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OVERVIEW OF NETWORK RETAIL IN UKRAINE AND PROSPECTIVE DIRECTIONS OF ITS DEVELOPMENT

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Abstract. The article examines changes in the structure of retail chains by the number of points of sale, as well as the regional distribution of these stores. According to the survey, the number of operating stores in the country increased by 31% during the 20 months of the war. It is noted that the retail market of Ukraine remains one of the largest and most powerful in Europe, and further growth in the volume of retail turnover is predicted. The growing popularity of network stores and omnichannel strategies among retailers are also highlighted. The main trends in the development of retail trade in Ukraine, including digital transformation, social responsibility and personalization, are analyzed.
Researchers examine the impact of economic and social factors on consumer behavior in an uncertain and changing market environment. It is noted that the population, in search of savings, pays attention to goods with low prices and offers with discounts, in particular, to essential goods. The growing popularity of "hard discounters" and e-commerce as a means of ensuring economic benefits for buyers is noted. Trends in the development of marketplaces and an omnichannel approach to the sale of goods are also analyzed. The need for retailers to look for new opportunities to increase sales and expand the assortment, as well as the need to optimize supply chains and improve customer service are the consequence of these changes.
The widespread adoption of technologies, such as self-service and payment using QR codes, which help to reduce costs and improve business efficiency, in the offline segment, is noted. The impact of augmented and virtual reality on retail, highlighting the benefits of personalized service and product visualization capabilities, is also examined. The authors also draw attention to the importance of cybersecurity and personalization in the work with clients, which remain key ones in the conditions of changing consumer preferences and competition.

Keywords: retail, network retail, retail market, digital transformation, omnichannel

Introduction

In a changing and unpredictable competitive environment, the Ukrainian retail market is forced to continuously adapt and change its development strategies. Rapid development of technologies and changes in consumer preferences encourage enterprises to review their formats and provide quality services. Therefore, enterprises actively introduce new formats, expand the assortment of goods and improve service in order to attract consumers. This leads to an increase in supply from manufacturers.
To achieve such goals, enterprises develop and implement continuous development strategies, expand their activities and structures, and implement local and global projects of changes in their activities. Recently, there has been an intensive development of network organizations in trade, penetrating all regions of the country.
Changes in the conditions of trading business and the need to adapt to them make this research relevant. Its purpose is to substantiate the trends and features of the development of trade in the conditions of constant changes.

Literature review

The latest research and publications in the field of effective management of the development of network trade attract significant attention of leading scientists both in domestic and foreign scientific circles. Bogoroditska *et al.* (2021), Curska (2022), Galkiv, Demchyshyn. & Hryschuk (2016), Vlasova & Kolyuchkova, (2012), Sak & Hrytsyuk (2020), Ilchenko & Kavun (2016), Szczukocka (2020), Kashperska (2021), Mykolaichuk & Silkina (2019), Mroszczyk (2008) and other scientists (*What awaits Ukrainian e-commerce,* n.d.; *State of the e-commerce market,* n.d.; *Official web resource,* n.d.*; GT Partners Ukraine,* n.d.; *Top-10 product retailers,* n.d.) are famous authors on this topic. Despite the extensive amount of research in this direction, some aspects remain insufficiently covered, in particular, the prospects for the development of trade networks. This is especially relevant given the constant change in the external environment, the implementation of digitalization processes, as well as the need to systematize and assess the impact of various factors. Thus, conducting research in this area is of great importance for understanding modern trends and effective management in network retail.

The purpose of the article consists in theoretical and methodical substantiation of current trends in the development of network retail, taking into account the peculiarities of its operation in Ukraine. Based on the research of Internet resources and information and analytical domestic publications, an analysis of trends and features of trade development in conditions of constant changes is carried out.

Results and discussion

The Russian invasion of Ukraine led not only to more refugees, but also to the displacement of many businesses. Recently, the structure of retail chains in terms of the number of points of sale in Ukraine has undergone changes due to this situation.

RAU's regular monthly survey of hundreds of Retailers Association members revealed 17.692 points of sale across nine major retail sectors, including the entertainment sector, as of October 2023. They include food and non-food retail, pharmacy, clothing, footwear and accessories, as well as appliances and electronics. During the 20 months of the war, the number of working shops increased by 31%, which indicates not only the recovery of the industry, but also its development (+1.9%) (*State of the e-commerce market,* n.d.).

Regionally, the largest number of stores is concentrated in Kyiv and the region, as well as in the Lviv and Dnipropetrovsk regions. Top-5 regions, including Odesa and Vinnytsia regions, unite 54% of retail points of sale in Ukraine.

The retail market of Ukraine is one of the largest and most powerful ones in Europe. In 2022, the volume of retail turnover increased by 14% to UAH 1.874.900 million. It is predicted that in 2024, this indicator will increase by 10%, to UAH 2.062.390 million. Competition in the market is high, formats and channels are diverse, adaptation to changes in consumer demand and innovation are important. It is also worth noting that the variety of online stores in the country has increased, and the omnichannel strategy is gaining popularity among retailers.

The retail market of Ukraine is characterized by high competition, a variety of formats and channels, as well as an orientation towards innovation and adaptation to changes in consumer demand. According to the Nielsen company, in 2022 there were more than 70.000 retail points of sale in Ukraine, approximately 60% of which were discounters, 20% – supermarkets, 10% – hypermarkets, 5% – convenience stores, and another 5 % - specialty stores (*What awaits Ukrainian e-commerce,* n.d.).

In the field of food retail at the beginning of June 2023, the same three players remained the leaders in terms of the number of points of sale. ATB (Dnipro), Fozzy Group (Kyiv) and VolWest Retail (Lutsk) continue to play a leading role in this industry.

Fozzy Group is particularly active in development. In the first half of the year, this company opened 17 new stores, which brought the total number of points in 22 regions to 709. Although this is 5 stores less than in the previous year of 2021, but the percentage growth is only 2.5%.

ATB also showed an increase in the number of stores by 2.2%, up to 1.187 points of sale. However, it lags behind by about 120 stores compared to the previous period before the war.

Table 1. Leaders of Ukrainian food chains by the number of operating stores in the first half of 2023

Company	Number of points of sale as of June 2023	Number of points of sale in 2022	Growth in 2023-2022, %
ATB-Market LLC	1187	1162	2,2%
Fozzy Group	709	692	2,5%
Volwest Retail	252	249	1,2%
PJSC MHP	231	220	5,0%
ARETAIL LLC	228	221	3,2%
TVC Lvivholod LLC	200	200	0%
Clever Stores LLC	194	167	16,2%

Source: compiled by the authors [7]

VolWest Group, which develops the Nash Kray and SPAR chains under the franchise scheme, showed 1.2% growth. As of June 2023, both company networks had 252 points of sale.

Among the players of the national scale, the Myasomarket chain, owned by the MHP agricultural holding, deserves special attention. The retailer opened 27 stores during the half year (which is +5%) and increased the total number of points to 231 (*Top-10 product retailers*, n.d.).

Recent events, ranging from the coronavirus pandemic to full-scale war, have greatly accelerated the development of online sales. This happened as a result of forced closures, destruction or occupation of stores, which forced a lot of buyers to move to other regions. Retail chains such as EVA, Varus, ATB, Comfy and others are actively investing in online trade. In particular, Fozzy Group launched a new MauDau marketplace - its fifth project in the field of e-commerce. According to EVO, e-commerce showed record growth in 2020 amid the COVID-19 pandemic, increasing by 38% to $4 billion. The following year, growth slowed to 17.5%, but during the two years of the war, e-commerce grew by 6.4% in currency equivalent (*GT Partners Ukraine*, n.d.).

Along with the growing popularity of online shopping, there has been an increase in competition for the speed of delivery. For example, the Rozetka company, which is an integral part of the Ukrainian electronic market, successfully coped with the challenges that arose at the beginning of the war. After a sharp decrease in sales volumes by 175 times (to UAH 23 million per month), the company is actively developing a network of its own distribution points. As of the beginning of December 2023, the network had 456 delivery points in 138 cities of Ukraine. Today, Rozetka is the leader in the volume of consolidated turnover of the marketplace and online store for 2023 - UAH 45 billion. Last year, sales of Rozetka already exceeded pre-war figures.

Comfy, an online store for appliances and electronics with a turnover almost five times lower (UAH 9.7 billion), was in second place. It is important to note that Comfy's share of online sales is higher than its competitors, accounting for more than 30%.

The Foxtrot company, which ranks only ninth in terms of annual online sales of UAH 2.1 billion, is the closest competitor. However, it is worth noting that the retailer suffered the loss of a central warehouse with an area of more than 30.000 square meters in Gostomel with goods worth UAH 650 million and was therefore forced to reduce investments in its e-commerce, focusing on the optimization of internal processes.

The top three is completed by the only foreign player - AliExpress, with targeted sales figures of UAH 7-11 billion. According to the logistics operator Cainiao, which is referred to by Ukrposhta as a postal partner of the marketplace, 80% of purchases are goods worth up to $10 (*State of the e-commerce market.* n.d.).

Table 2. The largest retailers in terms of sales in the Ukrainian e-commerce segment in 2023

No.	Name	Revenue, UAH billion	Specialization	Traffic, million visits
1	Rozetka	45	Online store and marketplace	398.5
2	Comfi	9,7	Online store	80.9
3	AliExpress	7,5-11	Marketplace	96.7
4	EPICENTER	7,9	Online store and marketplace	206.1
5	ALLO	5,7	Online store and marketplace	85.6
6	Silpo	3,6-4,3	Online store	33.4
7	MAKEUP	3,2-3,9	Online store and marketplace	115.5
8	EVA	2,4	Online store and marketplace	86.9
9	Foxtrot	2,1	Online store	40.5
10	ATB	1,7-1,9	Online store	27.6

Source: compiled by the authors [6]

The Ukrainian online store and marketplace of the Epicenter company successfully competes with other players, having a significant volume of traffic - more than 206 million visits per year. Since 2020, when the marketplace was launched (the online store has been operating since 2016), the range of products has increased from 1 to 4.5 million items. Epicenter's main goal is to double its share of the Ukrainian e-commerce market, which currently stands at 10%.

The Allo company, which has earned UAH 5.7 billion, is also among the top 5 e-commerce leaders. In 2023, they actively developed a network of points of goods delivery from their Allo.ua platform, opening them in the form of small-format stores and corners at OKKO gas stations. Their plans include opening similar corners throughout Kyiv. Also, Allo.ua has been operating as a marketplace where goods of various categories are sold for three years. In 2023, the network's Internet division sales increased by 22% compared to 2022.

Three more participants in the rating represent the food retail segments, including Fozzy Group with the Silpo online store and the maudau marketplace, which was launched in 2021. In 2022-2023, the maudau grew 4.5 times due to investment in advertising. The largest prodretail network - ATB on the Internet - surpasses the maudau in terms of turnover, but lags behind Silpo by almost two times. It is planned that the number of users of the ATB's own mobile application will double the number of regular online shoppers of the retailer thanks to the application, which will allow not only to shop in the supermarket, but also to search and buy tickets for trains or planes, pay taxes and utility bills.

Other players from the top 15 largest e-commerce retailers include segments of drogerie (EVA and MakeUp), fashion retail (Intertop and Kasta), as well as one of the largest online pet stores Pethouse and book platform Yakaboo. However, these segments still generate approximately UAH 1 billion in revenue per year.

Table 3. Volume of the Ukrainian online trade market in 2023

Year	Volume of retail trade, UAH	Online sales, UAH
2021	1.443 billion (+20%)	129 billion (+20%)
2022	1.396 billion (-3%)	151 billion (+17%)
2023	1.819 billion (+30%)	182 billion (+21%)

Source: compiled by the authors [7]

According to a study by the EVO company, in 2023 there were more than 20.000 online stores in Ukraine, of which about 40% worked in the non-food sector, 30% - in the food sector, 20% - in the mixed sector and 10% - in other sectors. Also, 10 million Ukrainians bought goods online. Of them, 1.5 million made their first purchase in 2023. And the total amount of sales of goods and services via the Internet amounted to more than UAH 182 billion (*Top-10 product retailers*, n.d.).

The Ukrainian e-commerce market continues its development, despite the difficult situation with the war. In 2023, its volume reached UAH 151 billion, which is 17% more than in 2022. Mobile e-commerce has already become a necessary component of the Ukrainian electronic market. In 2024, this trend will continue and more and more purchases will be made via mobile devices. Stores that will not be optimized for mobile devices are at risk of losing part of their customer potential. According to Statista, in 2024 mobile shopping will account for 72.9% of total e-commerce.

The popularity of shopping on the Internet using voice input is growing both in Ukraine and around the world. Voice shopping allows customers to make purchases effectively without being distracted from their activities. They can easily add items to the cart or place an order by voice, saving their time. Ukrainian stores are already implementing voice shopping, for example, the Rozetka marketplace provides its customers with the opportunity to make purchases using the voice assistant Alisa.

Social networks are becoming an increasingly popular channel for selling goods and services. It's fast and convenient for buyers and affordable for sellers. It is predicted that by 2024, social commerce will reach $36.09 billion (*Top-10 product retailers,* n.d.).

Live streaming services are a new way of shopping. They combine video viewing and online shopping, allowing shoppers to learn more about products and services and watch them being used in real time. According to Coresight Research, in 2024 purchases in live streaming services will reach $25 billion.

Influencer marketing is an effective tool for increasing brand awareness and attracting customers. Collaboration with influencers allows brands to reach their target audience through their trust and influence. In 2024, spending on influencer marketing is predicted to increase by 4.3%.

Marketing automation is becoming increasingly popular among businesses. It allows to automate routine tasks, increasing the efficiency and personalization of marketing campaigns. The marketing automation market is predicted to reach $8.42 billion in 2024.

Feedback allows to receive real feedback from participants in business processes, which helps to improve quality and customer satisfaction.

Chatbots are becoming a popular communication tool for many businesses, helping to reduce costs and improve customer service.

Augmented reality allows consumers to try products and services in a virtual environment.

Data from the GfK company show that in Ukraine in 2022 there were more than 50 retailers that used an omnichannel strategy. Of this amount, about 60% were hypermarkets, 20% - supermarkets, 10% - specialty stores, and another 10% - other formats (*GT Partners Ukraine,* n.d.).

These data indicate the diversity of the market, emphasizing the role of different formats and channels in the retail industry of Ukraine, as well as the active use of the omnichannel strategy by various retailers to provide effective customer service.

The retail market of Ukraine is constantly evolving and adapting to changes in society, economy and technology. Here are some of the main trends that affect the development of retail in Ukraine.

Digital transformation is the process of implementing digital technologies in all aspects of retailers' activities, such as marketing, sales, logistics, analytics, personnel management, etc. Digital transformation enables retailers to improve business efficiency, increase customer loyalty, reduce costs and increase profits. Here are some examples of digital transformation in Ukraine: the launch of the Rozetka Marketplace online platform, the introduction of the Silpo Pay cashless payment system, the launch of the Metro Online product delivery service, the introduction of the Watsons AI artificial intelligence system for personalizing offers to customers, etc.

Social responsibility is the obligation of retailers to adhere to ethical, environmental and social standards in their activities, as well as to contribute to the development of society and people's well-being. Social responsibility allows retailers to improve their image, attract new customers, partners and employees, as well as reduce risks and conflicts. Here are some examples of social responsibility in Ukraine: the launch of the Novus Local small and medium business support program, the launch of the Auchan Eco project on processing plastic into furniture, the launch of the Silpo Healthy food promotion campaign, etc.

Personalization is the process of adapting offers, service and communications of retailers to individual needs, wishes and behavior of each customer. Personalization allows retailers to increase customer satisfaction and loyalty, conversion and average check, and gain a competitive advantage. Here are some examples of personalization in Ukraine: the launch of the Metro&Me loyalty program, the launch of the Rozetka Smart product recommendation service, the launch of the Intertop Style online stylist service, etc.

The global crisis situation against the background of the past coronavirus pandemic and the alarming geopolitical situation has determined buyers' desire for frugality and savings. In a number of regions, there is a decrease in the solvency of citizens. People save not only on luxury items, but also on everyday items from clothes to groceries.

The population buys less, looks for cheaper goods. In this vein, the stakes will be on promotions, offers, economic "family goods". The price prevails over the quality - let it be less functional, but the cost is lower. People may refuse to buy anything that is not a basic necessity.

The trend towards saving leads to the strengthening of the positions of the so-called "hard discounters" - those chain stores "near the house" that attract customers with low prices and constant discounts. How do you choose a favorite among them? Again, heading to where eternal promotions and low prices on products from the basic consumer basket.

Electronic purchases also fit into the trend of savings due to transparent benefits. People compare prices offline and online more and more in favor of the latter. Again, due to constant promotions, sales, affiliate programs, accumulative system of discounts, the ability to quickly compare certain products. It is interesting that today this trend extends to both the food and non-food segments.

Marketplaces, which in 2023 pleased with a record jump in sales, also remain in trend! What is especially good, in the near future this trend will only strengthen. And today, even those companies that have their own online stores with a good reputation and stable profits are increasing their customer base and sales volumes on marketplaces.

If in 2021 the volume of global retail e-commerce was close to $5.2 trillion, then in the near future this figure will increase by 56%. It is predicted that already in 2026 it will reach the mark of $8.1 trillion. Against this background, retailers should take care of strengthening their own social and mobile commerce, the operation of applications for smartphones. So, the buyer should be able to buy, order goods from his phone, as well as receive help and advice 24/7 in the same chatbot (*Official web resource*, n.d.).

Pay attention to emerging trends such as buy now, pay later (BNPL). These are convenient novelties, with the help of which you can deposit a certain percentage of the total purchase price, and then pay off the balance in equal installments over a certain period. It is predicted that the volume of global transactions for BNPL alone will increase in the next four years by $450 billion.

In 2024, low price determines product choice. Retailers in such conditions face a difficult task: where to find new opportunities to increase sales, so as not to lower prices to symbolic levels? The way out can be seen in the introduction of new products on the market and qualitative expansion of the assortment (Mykolaichuk & Silkina, 2019).

Research shows that 75% of buyers are interested in trying unusual, new products. There are categories of consumers who purposefully look for novelties, especially if they start at an attractive price. The main thing for a business here is not to get carried away with the diversification of the assortment, so as not to shift or blur the focus of attention of its company.

The trend of introducing new products leads to another fresh trend - omnichannelness. This is the desire to use all justified sales channels from leaflets, billboards, radio advertising to target, development of own website and launch of communities in social networks. Interestingly, the trend applies to both large and small players. Regardless of size, businesses understand that the stake today is on high-quality, sincere and close interaction with customers. They increase the number of points of contact with customers, work on the level of service and customer service. After all, the company's profit depends on the loyalty of consumers (Bogoroditska et al., 2021).

However, it is important not just to follow the omnichannel trend, but to do it qualitatively, so that every channel of interaction with customers - from the messenger to the marketplace – would allow to quickly buy and solve the issues that have arisen. Today, it is simply not possible to leave customers with only one way of ordering and purchasing. The more sales channels, the better for business.

Recent world events have made the situation of shortage or complete unavailability of usual goods already typical. The retailer's task is to be the first to offer consumers alternative products so that they do not have the desire to switch to another seller. In this vein, thoughtful correction of supply chain management cannot be dispensed with. Today, they are betting on speed, flexibility, the use of modern technologies and high quality of service (Kashperska, 2021).

Against the background of reducing costs and improving business efficiency, the trend towards digitalization of retail stands out. This is clearly manifested in the offline segment - the same introduction of terminals and entire self-service systems. This is how stores reduce personnel costs. The machines work without breaks, sick days and vacations, which helps to cope with such a problem as queues. The widespread use of payment using QR codes and SPB is a big step towards the convenience of payments.

Augmented and virtual realities managed to reach retail in 2024. Their main advantages are that, firstly, they give the buyer the opportunity to examine the product from all sides, even if it is thousands of kilometers away. Secondly, it is the same service personalization. It is not enough for buyers to see how the cosmetics or clothes look on the model. And with AR/VR, they can scan their face and figure to virtually "try on" a new mascara or dress. Finally, 3D visualization is the best argument in favor of quick purchasing decisions and a qualitative reduction in the number of returns.

Retail cannot be completely protected from the sad trend of DDoS attacks, fraudulent hacker schemes, and data leaks. The buyer in such conditions cannot trust the seller, if the latter is not able to ensure the protection of the confidentiality of his (the client's) data at the highest level. Therefore, it is important for retailers not to forget about the use of cyber security services (Vlasova & Kolyuchkova, 2012).

The replacement of traditional customer services with innovative ones fully applies to retail. After all, stores have to process huge amounts of data every day to improve customer service. Moreover, modern machine learning algorithms help to predict demand, minimize errors in business processes, and take over routine tasks that used to take staff time.

The focus on personalization in the work with consumers remains key one. Modern buyers are distinguished by "unstable loyalty" - even if they like a certain brand and its products, nothing prevents them from switching to another manufacturer or seller, guided by the same low price.

In order for this not to happen, the business needs to be able to analyze individual preferences of customers, which can be completely different. Personal mailings, individual discounts, subscriptions, and loyalty programs will be good helpers here.

Conclusions

Therefore, the retail market of Ukraine is determined by high competition and a variety of formats and channels. Recent events, including pandemics and war, have accelerated the development of online sales, requiring rapid adaptation and competition for delivery speed. Companies such as Rozetka are actively developing a network of their own delivery points, coping with the challenges of crisis situations. Players such as Comfy and AliExpress have also made their mark in online sales, but there are challenges, including losses of warehouses and instability in the military situation.

In the context of these changes, an omnichannel strategy, which requires a combination of online and offline sales channels to meet consumer needs, is becoming increasingly popular among retailers. Ukraine's retail market is predicted to continue to grow, especially in the e-commerce sector, but the volatile environment will require constant adaptation and innovation to function successfully. This Ukrainian market is constantly evolving and adapting to changes in society,

economy and technology. New trends include digital transformation, social responsibility and personalization that allow retailers to improve business efficiency.
In general, the retail sector of Ukraine continues to develop and adapt to new realities, using advanced technologies and strategies to meet consumer needs and ensure business success.

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ОГЛЯД МЕРЕЖЕВОГО РИТЕЙЛУ В УКРАЇНІ ТА ПЕРСПЕКТИВНІ НАПРЯМИ ЙОГО РОЗВИТКУ

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Анотація. У статті досліджено зміни в структурі торговельних мереж за кількістю торгових точок, а також за регіональним розподілом цих магазинів. За даними опитування, за 20 місяців війни кількість діючих магазинів у країні зросла на 31%. Зазначається, що ринок роздрібної торгівлі України залишається одним із найбільших і найпотужніших у Європі, і прогнозується подальше зростання обсягів роздрібного товарообігу. Також підкреслюється зростання популярності онлайн-магазинів і багатоканальних стратегій серед роздрібних продавців. Проаналізовано основні тренди розвитку роздрібної торгівлі в Україні, зокрема цифрову трансформацію, соціальну відповідальність та персоналізацію.

Дослідники вивчають вплив економічних і соціальних факторів на поведінку споживачів у невизначеному та мінливому ринковому середовищі. Зазначається, що населення в пошуках заощаджень звертає увагу на товари з низькими цінами та пропозиції зі знижками, зокрема на товари першої необхідності. Відзначено зростання популярності «хард дискаунтерів» та електронної комерції як засобу забезпечення економічної вигоди для покупців. Також проаналізовано тенденції розвитку маркетплейсів та омніканального підходу до продажу товарів. Наслідком цих змін є потреба рітейлерів шукати нові можливості для збільшення продажів і розширення асортименту, а також потреба в оптимізації ланцюжків поставок і покращенні обслуговування клієнтів.

Відзначено широке впровадження в офлайн-сегменті технологій, таких як самообслуговування та оплата за допомогою QR-кодів, які допомагають скоротити витрати та підвищити ефективність бізнесу. Також досліджено вплив доповненої та віртуальної реальності на роздрібну торгівлю, підкреслюючи переваги персоналізованого обслуговування та можливості візуалізації продукту. Автори також звертають увагу на важливість кібербезпеки та персоналізації в роботі з клієнтами, які залишаються ключовими в умовах зміни споживчих уподобань і конкуренції.

Ключові слова: ритейл, мережевий ритейл, ринок ритейлу, цифрова трансформація, омніканальність