

Apparel and Footwear Specialists in Ukraine

March 2024

Table of Contents

KEY DATA FINDINGS

2023 DEVELOPMENTS

Trade remains subdued as Ukrainians rein in discretionary spending

H&M resumes operations in Ukraine

Local brands continue to gain ground

PROSPECTS AND OPPORTUNITIES

Operators with a lower price positioning set to perform well

War will continue to shape consumer preferences and competitive strategies

Polish chain Greenpoint expected to enter Ukraine in 2024

CHANNEL DATA

Table 1 - Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space 2018-2023

Table 2 - Apparel and Footwear Specialists: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 3 - Apparel and Footwear Specialists GBO Company Shares: % Value 2019-2023

Table 4 - Apparel and Footwear Specialists GBN Brand Shares: % Value 2020-2023

Table 5 - Apparel and Footwear Specialists LBN Brand Shares: Outlets 2020-2023

Table 6 - Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 7 - Apparel and Footwear Specialists Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Retail in Ukraine - Industry Overview

EXECUTIVE SUMMARY

Retail in 2023: The big picture

War-induced disruption further strengthens penetration of e-commerce in Ukraine

Domestic retailers continue to gain ground across the market

What next for retail?

OPERATING ENVIRONMENT

Informal retail

Opening hours for physical retail

Summary 1 - Standard Opening Hours by Channel Type 2023

Seasonality

International Women's Day

New Year

MARKET DATA

Table 8 - Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2018-2023

Table 9 - Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2018-2023

Table 10 - Sales in Retail Offline by Channel: Value 2018-2023

Table 11 - Sales in Retail Offline by Channel: % Value Growth 2018-2023

Table 12 - Retail Offline Outlets by Channel: Units 2018-2023

Table 13 - Retail Offline Outlets by Channel: % Unit Growth 2018-2023

Table 14 - Sales in Retail E-Commerce by Product: Value 2018-2023

Table 15 - Sales in Retail E-Commerce by Product: % Value Growth 2018-2023

Table 16 - Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 17 - Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 18 - Sales in Grocery Retailers by Channel: Value 2018-2023

Table 19 - Sales in Grocery Retailers by Channel: % Value Growth 2018-2023

Table 20 - Grocery Retailers Outlets by Channel: Units 2018-2023

Table 21 - Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023

Table 22 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space 2018-2023

Table 23 - Non-Grocery Retailers: Value Sales, Outlets and Selling Space: % Growth 2018-2023

Table 24 - Sales in Non-Grocery Retailers by Channel: Value 2018-2023

Table 25 - Sales in Non-Grocery Retailers by Channel: % Value Growth 2018-2023

Table 26 - Non-Grocery Retailers Outlets by Channel: Units 2018-2023

Table 27 - Non-Grocery Retailers Outlets by Channel: % Unit Growth 2018-2023

Table 28 - Retail GBO Company Shares: % Value 2019-2023

Table 29 - Retail GBN Brand Shares: % Value 2020-2023

Table 30 - Retail Offline GBO Company Shares: % Value 2019-2023

Table 31 - Retail Offline GBN Brand Shares: % Value 2020-2023

Table 32 - Retail Offline LBN Brand Shares: Outlets 2020-2023

Table 33 - Retail E-Commerce GBO Company Shares: % Value 2019-2023

Table 34 - Retail E-Commerce GBN Brand Shares: % Value 2020-2023

Table 35 - Grocery Retailers GBO Company Shares: % Value 2019-2023

Table 36 - Grocery Retailers GBN Brand Shares: % Value 2020-2023

Table 37 - Grocery Retailers LBN Brand Shares: Outlets 2020-2023

Table 38 - Non-Grocery Retailers GBO Company Shares: % Value 2019-2023

Table 39 - Non-Grocery Retailers GBN Brand Shares: % Value 2020-2023

Table 40 - Non-Grocery Retailers LBN Brand Shares: Outlets 2020-2023

Table 41 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: Value 2023-2028

Table 42 - Forecast Sales in Retail by Retail Offline vs Retail E-Commerce: % Value Growth 2023-2028

Table 43 - Forecast Sales in Retail Offline by Channel: Value 2023-2028

Table 44 - Forecast Sales in Retail Offline by Channel: % Value Growth 2023-2028

Table 45 - Forecast Retail Offline Outlets by Channel: Units 2023-2028

Table 46 - Forecast Retail Offline Outlets by Channel: % Unit Growth 2023-2028

Table 47 - Forecast Sales in Retail E-Commerce by Product: Value 2023-2028

Table 48 - Forecast Sales in Retail E-Commerce by Product: % Value Growth 2023-2028

Table 49 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 50 - Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 51 - Forecast Sales in Grocery Retailers by Channel: Value 2023-2028

Table 52 - Forecast Sales in Grocery Retailers by Channel: % Value Growth 2023-2028

Table 53 - Forecast Grocery Retailers Outlets by Channel: Units 2023-2028

Table 54 - Forecast Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028

Table 55 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space 2023-2028

Table 56 - Non-Grocery Retailers Forecasts: Value Sales, Outlets and Selling Space: % Growth 2023-2028

Table 57 - Forecast Sales in Non-Grocery Retailers by Channel: Value 2023-2028

Table 58 - Forecast Sales in Non-Grocery Retailers by Channel: % Value Growth 2023-2028

Table 59 - Forecast Non-Grocery Retailers Outlets by Channel: Units 2023-2028

Table 60 - Forecast Non-Grocery Retailers Outlets by Channel: % Unit Growth 2023-2028

DISCLAIMER

SOURCES

Summary 2 - Research Sources

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/apparel-and-footwear-specialists-in-ukraine/report.