

одна з найбільш вразливих галузей, стикається з численними кризовими явищами, серед яких зміни у споживчих вподобаннях, коливання економічної ситуації, пандемії та інші зовнішні фактори. Вивчення антикризових методів та інструментів, таких як гнучкість в управлінні, адаптація до нових технологій, оптимізація витрат і використання digital-маркетингу, дозволяє зменшити ризики та мінімізувати втрати.

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THE ENDURANCE OF THE UKRAINE'S RESTAURANT INDUSTRY AMID CHALLENGES

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Despite the hostilities, the restaurant business is actively developing and recovering, demonstrating remarkable flexibility and adaptability. New formats and concepts are emerging, along with shifts in consumer preferences and clientele. Both practitioners and scholars are raising questions about the post-war revival and development of the restaurant business in various aspects of its functioning, including the formation of new brand identities and core values, the increasing role of innovative and digital technologies, the promotion of healthy eating, and the potential of gastronomic tourism as a factor in Ukraine's attractiveness.

It should be noted that in the pre-war and pre-pandemic periods, Ukraine's restaurant business experienced stable growth, demonstrating

competitive advantages and strong profitability. A significant number of establishments earned a reputation as reliable and socially responsible enterprises. Despite numerous challenges, the period of quarantine restrictions brought substantial innovations to the restaurant business, ensuring safety for both customers and employees. These innovations spread across nearly all establishments and included the possibility of ordering takeaway or home delivery via third-party services, the establishment of drive-through systems, improvements in packaging to maintain sanitary standards and preserve food quality, as well as the widespread adoption of contactless and mobile payment methods, mandatory digital menus accessible via QR codes, online ordering and payment options, and the development of specialized apps. The inevitable expansion of social media and messaging platforms enabled restaurants to maintain their reputation at a high level by swiftly and flexibly responding to emerging threats, which became a decisive factor in the survival of many businesses. According to a survey, 40% of restaurant industry entrepreneurs, across all segments from fine dining to casual cafes and eateries, confirmed the integration of technological solutions into their businesses [1].

A notable trend is that millennials and Generation Z are the primary target audience for food delivery services. Compared to other generations, they allocate the largest portion of their budget to ordering prepared meals, making food quality and safety paramount concerns for them. Additionally, they demand instant delivery, gamification, personalization, and real-time tracking of orders [1]. These generations are also more likely to leave reviews, shaping either a positive or negative online reputation for businesses.

During the pandemic period, the primary safety concerns were compliance with hygiene and sanitation regulations, food safety, and cleanliness. However, during wartime, the focus has shifted to the immediate safety and survival of individuals.

Since the onset of the full-scale war, the Ukrainian restaurant market has contracted from 36,500 to 32,000 establishments. According to recent data, the average revenue of restaurant businesses in Ukraine grew by 40% in 2023 compared to 2022. Considering the depreciation of the national currency and the consequent rise in prices, the average check increased by 38% [3]. At the same time, the average attendance at restaurants in 2024 decreased by 7% compared to last year. Pizzerias and fast food restaurants showed the worst performance, with the number of visitors falling by 8%. Despite attacks on civilian infrastructure and electricity outages, the industry did not experience a massive wave of restaurant closures. However, revenue losses varied by location, with some establishments reporting declines of up to 15% [3].

One of the most remarkable aspects of the Ukrainian restaurant business is its exceptional adaptability. 2023 - 2024 winter periods became a true test for the entire country, with continuous power outages transforming restaurants into resilience hubs for thousands of Ukrainians. Many establishments provided free access to Wi-Fi, charging stations for mobile devices, workspaces, warmth, and emotional support during difficult times. Restaurants located in basements or

semi-basement spaces were in the most advantageous position, as they could continue operating during air raid alerts, offering not only food services but also serving as shelters for visitors. Establishments that took part in these efforts gained a strong reputational advantage and a loyal customer base.

The most resilient and safest restaurants are located in western part of Ukraine, particularly in Lviv and the Lviv region. Lviv Croissants, known for its affordable yet high-quality café-bakery concept, remains the largest restaurant chain in Ukraine with 11 branches in Poland. In 2024, the chain launched franchises in Slovakia, the United States, and in Cannes, France. [3]. During the war, the company demonstrates strong operational stability. However, customer reviews regarding service and food quality have declined since the war began, requiring further analysis and strategic improvements. The challenge lies in the franchise model, where maintaining uniformly high standards across all locations is a complex task.

The second-largest restaurant group is !FEST Holding of Emotions, which in 2024, opened 45 new establishments, expanding to 150 locations in Ukraine, some of which operate under a franchise model. The third-largest chain is McDonald's, which gradually resumed operations in Ukraine from September 2022. The company deliberately delayed reopening, emphasizing that the safety of employees and customers was its top priority. One of its new strategic directions involves opening locations along major highways, increasing competition with restaurant brands at fuel stations such as WOG, OKKO, and UPG.

GastroFamily, the restaurant group founded by Dmytro Borysov, had positive results in 2023, but lost its fourth position in 2024 and moved to the sixth one.

The top five largest restaurant chains are rounded out by the American franchise Domino's Pizza, which continues to operate 65 locations in Ukraine, despite closures in the southern and eastern regions due to the war, and KFC with 64 restaurants.

According to Forbes Ukraine, the largest restaurant chains as of March, 2024, are as follows:

Table 1

Top 10 Restaurant Chains in Ukraine

No	Restaurant Chain	Number of Locations	Number of Cities
1	Lviv Croissants	179	42
2	!FEST Holding (“Piana Vyshnia”, “Lvivska Maisternia Shokoladu”, “Rebernia” Restaurants: “Teatr Pyva Pravda”, “Mazokh Kafé”, “Hasova Lampa”, “Kryivka”, “Poshta na Drukarskii”)	150	33
3	McDonald's	109	35
4	Domino's Pizza	65	14

5	KFC	64	21
6	GastroFamily (e.g., “Ostannia Barykada”, “Ohota na Ovets”, “Mushlya”, “BPSH”)	62	17
7	Kumpel Group (+Fast Food Systems)	50	29
8	Puzata Hata	41	6
9	Chornomorka	32	13
10	Tarantino family	24	1

Source: compiled on basis [3]

The above presented restaurant establishments make up only a third of the Ukrainian HoReCa market. As of 29 December 2023, there were 32,000 restaurant establishments in Ukraine, of which 6,500 were restaurants and 6,000 were coffee shops [3]. In this context, it is necessary to add that the presented rating does not take into account several other large mixed-format chains, as well as restaurants and coffee shops at petrol stations that have a good reputation and are identified as safe by drivers and travellers, and compete with McDonald's and KFC.

According to the same study by Forbes Ukraine [3], the WOG petrol station chain is represented by 360 WOG Cafe restaurants, as of January, 2025. OKKO has 404 HotCafes, as well as 27 restaurants under the A la Minute, Pasta Mia and Meiwei brands [3]. In view of this, it is evident that WOG and OKKO are the largest companies in the restaurant segment. However, most of their outlets are integrated into petrol stations, so they are not represented in the ranking above.

Summing up it is necessary to admit that Ukrainian restaurant industry has demonstrated remarkable resilience and adaptability in the face of unprecedented challenges, from the pandemic to the ongoing war. Despite economic instability, power outages, ongoing risks and uncertainties and shifting consumer behaviours, the sector continues to evolve, introducing new formats, expanding franchise models, and leveraging digital innovations to sustain operations and enhance customer experiences. Further research is needed to explore how reputation management, crisis response strategies, and consumer preferences influence the industry's ability to thrive in the post-war and post-crisis landscape.

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