



Consumer Foodservice in Ukraine

March 2026

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Consumer Foodservice in Ukraine

EXECUTIVE SUMMARY

Ukraine's consumer foodservice sustains growth through resilience and adaptation

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Consumer foodservice sustains value growth despite declining footfall
Delivery and takeaway reinforce their role as structural growth channels
Consumer pragmatism drives value-focused strategies and digital engagement

WHAT'S NEXT?

Consumer foodservice sales in Ukraine are set for sustained growth during market adaptation
Innovation in automation and virtual dining are set to address labour challenges
Sustainability is set to gain momentum as a key trend in consumer foodservice

COMPETITIVE LANDSCAPE

Leading brands sustain top positions through scale, innovation, and diversification
Chin Chin drives the dynamic expansion of Asian cuisine across Ukraine
Notable openings highlight innovation in convenience, plant-based and virtual dining

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Inflation-driven growth masks underlying pressure in Ukraine's cafés/bars
Shifting consumer habits support growth across cafés/bars and hybrid formats

Economy-format bar concepts gain traction as value becomes paramount

WHAT'S NEXT?

Evolving consumer preferences and flexible formats are set to support value growth

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INDUSTRY PERFORMANCE

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Consumer pragmatism reshapes full-service restaurant demand in Ukraine

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WHAT'S NEXT?

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Affordable and convenient formats sustain demand for street stalls/kiosks

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INDUSTRY PERFORMANCE

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Standalone outlets maintain growth through operational agility

Value-led propositions drive recovery in consumer foodservice

WHAT'S NEXT?

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