

Perspective

Restaurant retail trendbook: The case of Ukraine in a crisis period

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CITATION

Bovsh L, Hopkalo L, Rasulova A.
Restaurant retail trendbook: The case
of Ukraine in a crisis period.
Business & Marketing Trends. 2025;
1(1): 2784.
<https://doi.org/10.59400/bmt2784>

ARTICLE INFO

Received: 13 February 2025

Accepted: 24 March 2025

Available online: 28 March 2025

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Abstract: Logistics support is the basis of successful activity in any socio-economic field. With the advent of the COVID-19 pandemic, there was a threat of global escalation of infection, which caused a crisis in the restaurant business due to the physical impossibility of service in the establishment and the gradual depletion of financial resources. The situation was complicated by a new wave of irresistible action—a full-scale war in Ukraine, which complicated logistics flows due to the risks of physical destruction of cargo, warehouses and accompanying individuals. The search for new formats of activity, the activation of digital relations, collaborations of related economic fields and survival tactics became new goals of adaptations of restaurant business entities. The article examines the trends in the development of restaurant retail. The adaptation strategies of business entities are analyzed, which include digitalization, omnichannel, collaborations with catering, dark kitchens and the development of grab-and-go formats. Special attention is paid to the impact of economic, social and security challenges on changing consumer behavior and transforming business models. Cases of Ukrainian companies demonstrating successful anti-crisis strategies are presented, and key trends that will shape the future of restaurant retail both in Ukraine and around the world are identified. The aim of the study was to determine how the restaurant business integrates into retail and forms successful cases of collaborations. The hypothesis is put forward that the restaurant business in times of crisis is transformed through adaptation to new challenges and diversification of activities. To develop the hypothesis and form research insight, the authors used the horizon scanning method and general scientific methods. The study concluded that restaurant-retail collaborations have positive prospects and mutually beneficially affect logistics, expand communications with consumers and stakeholders, and also contribute to strengthening brands. The importance of the research lies in applying the results obtained in theory and practice to see new business formats during the crisis.

Keywords: restaurant business; catering; brand synergy; Online-to-Offline (O2O); grab-and-go; crisis management; Ukraine

1. Introduction

Economic entities seek flexible and effective formats for survival and business development in times of crisis. The challenges of the coronavirus pandemic, military conflicts, and natural and man-made disasters cause collapses and crises. The restaurant business is most susceptible to the influence of these dangerous factors—an environment where the atmosphere and impressions of the interior and communications complement food services. The ban on physical contact during COVID-19 caused many restaurants to close down and switch to delivery and take-out formats, which allowed them to maintain their positions in the market. In addition, new formats of cooperation between the restaurant business and stores and delivery services have appeared as an opportunity to sell restaurant products. Economic and

social shocks of sudden stresses and crises were overcome by collaboration with retail in logistical aspects. The article aimed to identify and systematize key trends in restaurant retail in the context of a crisis period using the example of Ukraine. The study hypothesized that during a crisis, restaurant retail is transformed under the influence of environmental challenges, changes in consumer preferences, digitalization, and economic factors, which leads to the emergence of new business models and adaptive collaborations to increase the industry's sustainability.

A priori and acquired managerial competencies in trade and logistics cooperation form the current needs for studying trends and prospects for the development of restaurant retail.

Ukrainian restaurant business entities, diversifying their activities, are forming experience in cooperation with retail. Thus, an innovative concept is being formed—a collaborative product, which in the conditions of distancing services has shown its practicality and usefulness for consumers. Therefore, researching trends and prospects of restaurant retail is an important task in terms of the view of deploying tactics and strategies for the development of the restaurant business.

The trading field has been a driver of urban development since ancient times. Therefore, research covers different historical periods. Over time, business entities have mastered new channels of both offline and online sales, which have also not gone unnoticed by scientists. Relevant studies were conducted by Heinemann [1], who investigated the possibilities of integrating artificial intelligence into retail; Yermoshenko et al. [2]—the evolution of retail; Trubei et al. [3]—the restoration of businesses activity of retail entities in Ukraine in wartime.

As for restaurant retail, as the analysis of scientific sources shows, there is little interest. Thus, the study of the innovative business model of Eataly (an international gastronomic network), which combines retail with restaurants, is reflected in the works of Barrère [4] and Colombino [5]. The gastronomic experience in Eataly stores in New York, Rome, Munich and Istanbul was studied by Pasquinelli et al. [6], who analyzed the elements of three archetypal relationships: authenticity of origin, standardized authenticity and localized authenticity. The formation of the experience of pop-up restaurants was studied by Aaltojärvi et al. [7]. As a growth strategy through the expansion of a fast food brand into a retail network, de Reuck and Bick [8] presented it. As for domestic research, aspects of cooperation between retail and restaurant business in Ukraine have not been studied enough. Thus, the features of the work and quality of food courts in shopping centers are reflected in the work of Bovsh and Komarnitsky [9]. Other sources of information are professional blogs and analytics [10,11]. Of particular note is the research on retail collaborations with catering, contained in the works of Zhao et al. [12] and Li [13].

Thus, we see that the topic of restaurant retail is not sufficiently covered and requires elaboration in both theoretical issues and practical cases of interaction in hybrid formats of restaurant business and retail, which is a promising direction for the development of the restaurant services market in wartime and post-war times.

2. Materials and methods

The theoretical basis of the article was the study of the chains of interaction between the restaurant business entity and the retailer. The authors used general economic and analytical methods to conduct the study. Thus, the contamination of interpretations into “restaurant” and “retail” allowed the formulation of the operational term “restaurant retail”. The systematization method contributed to the identification of forms of collaboration between the restaurant business and retail. Practical insights also determined the primary forms of integration of the restaurant business into retail. Research into trends and tendencies in restaurant retail was conducted for the period 2007–2025. The horizon scanning method was used to process the data. First, the main markers of trends and tendencies in restaurant retail were determined. Then, a study of the main processes that developed in accordance with the indicated markers was conducted, and the effects of their occurrence were determined. The specified method analyzed digital innovations and technological transformations in the industry. The next step was to study the actual potential of cooperation. Thus, based on a statistical analysis of the total number of outlets of leading food retailers in Ukraine, the positive dynamics of market development and the tendency to scale it up were confirmed. Next, the authors modeled possible interaction channels between restaurant business entities and retailers. Based on the challenges of the environment, trend solutions were formed to adapt to crises. As a promising business model, a model of communication fulfillment for restaurant retail was proposed. It provides a complete cycle of interaction with the consumer—from personalized communication and order acceptance to satisfaction, after-sales service, and customer retention through digital channels and CRM systems.

Thus, a conclusion was made about which areas of collaboration are more important for economic development, given that positive results have been obtained from such cooperation between restaurant and retail entities. Scientific and analytical sources of information were used for the study.

3. Results and discussion

3.1. Theoretical foundations of restaurant retail

To clearly understand the forms of interaction in restaurant retail, it is worth orienting yourself in operational terminology. The subjects of the restaurant business are restaurants and catering companies. Accordingly, a restaurant is an establishment of a certain concept and format, where the production of dishes and drinks (restaurant product) is carried out, their consumption is organized and related services are provided. Catering is a form of restaurant service that involves the preparation of restaurant products and the provision of restaurant service on the go. In turn, retail is the process of selling products or services to end consumers [14]. Thus, restaurant retail can be defined as a form of collaboration between a restaurant business entity that creates a restaurant product and a retailer that provides communication with the consumer and the sale/delivery of the restaurant product through its own channels and points of sale, ensuring the complexity of the retailer’s service.

Thus, the collaboration of restaurant formats with retail forms channels for the sale of restaurant products: semi-finished products (ready-to-cook; cooking box), ready-made dishes and drinks (ready-to-eat; ready-to-drink), and services (catering, grab-and-go).

Retail supplies of restaurant products through retail are carried out through distributors, who act as intermediaries between manufacturers (restaurants or food service companies) and retail chains (**Figure 1**).

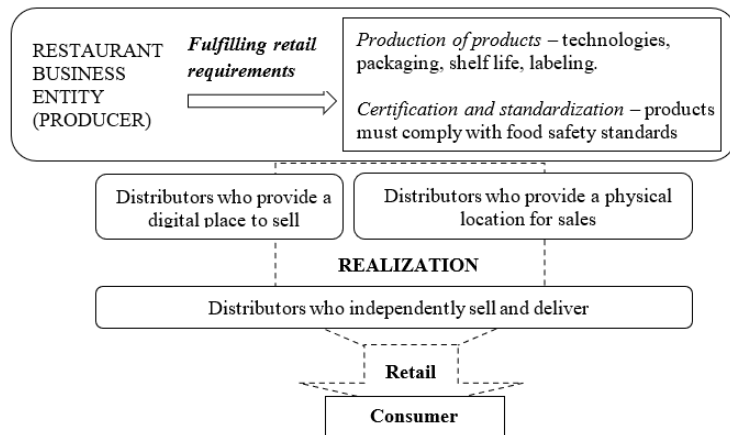


Figure 1. Chain of interaction between a restaurant business entity and a retailer.

Source: Own development.

Accordingly, the integration of the restaurant business into retail can be carried out in the following forms **Figure 2**.

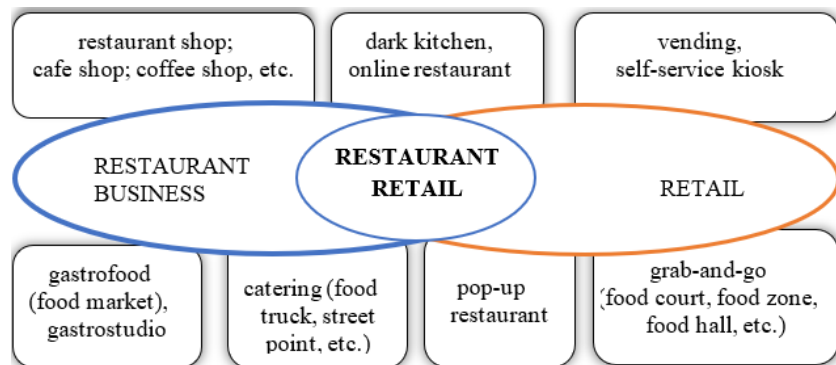


Figure 2. Forms of integration of the restaurant business into retail.

Source: Author’s research.

The store-restaurant formats (“Borisova’s Food KOLO tebe”, “KOLO” supermarket chain), store-cafe (food zone in Novus, Silpo supermarkets, etc.), store-coffee shop (food halls in “Epicenter” chains, etc.), sandwich shop (“Salateira” ZK Venetsia, Kyiv) are organized as food halls, the delivery of ready-made food to which is carried out from the dark kitchen by the restaurateurs themselves [15].

Gastrofoods (“Myasomarket”), gastrostudios (“Secrety Shefa”, “MHP”) are projects of stores near the home—mixes of a butcher shop and a restaurant [15].

The grab-and-go format is a key trend in restaurant retail in times of crisis. It can be represented by the concepts of food courts, food zones and food halls, which are located in shopping centers, exhibition areas and are often representatives of

well-known brands [9,16]: McDonald’s, “Kryla”, “SushyYa”, Noodle Doodle, KFC, etc.

Pop-up formats operate temporarily in a certain territory or in an unusual location, where the organization of a traditional type of establishment is difficult [7]. They are often located in furniture stores, art centers and other unusual locations (the “Pop-up Bistro” restaurant at the Pinchuk Art Centre).

Vending is mainly represented by coffee machines (60% of the total volume of vending trade in Ukraine), snack machines (respectively 10%), fresh fruit machines (juice machines, fruit machines)—they are not yet widespread in Ukraine [17]. As for self-service kiosks (QSR) [18], they are still used as terminals for selecting and paying for restaurant products in the sales halls of restaurants (Burger UA, McDonald’s, etc.).

Regarding online restaurants, their feature is the presence of a kitchen (dark kitchen, cook room) and the absence of an offline hall for receiving guests. At the same time, orders are placed around the clock using mobile applications, a website or a call to the operator [19,20]. The concepts of online restaurants are built on cooperation with digital retail based on O2O (Online to Offline) services. Retail, as an online component in O2O, is represented by marketplaces (Glovo, Bolt Food; Raketa kitchen.in.ua; Eda.ua; Portion.com.ua; Pokupon.ua; Superdeal.ua; Skidochnik.com.ua, etc.), which are part of the service distribution policy of the restaurant business entity. At the same time, restaurants are represented by the formats of online restaurants (Smilefood restaurant), cloud kitchens (Kitaika, Menya Musashi, Berliner Döner, Foodz Ukraine, Beyond Burger, Prosto Burger, etc. chains) [21,22].

In turn, catering is an important part of restaurant retail, which in times of crisis acquires new formats (corporate catering, delivery of ready-made meals to stores, mobile food services, food on transport, on-board meals) and collaborative solutions (see **Figure 3**).

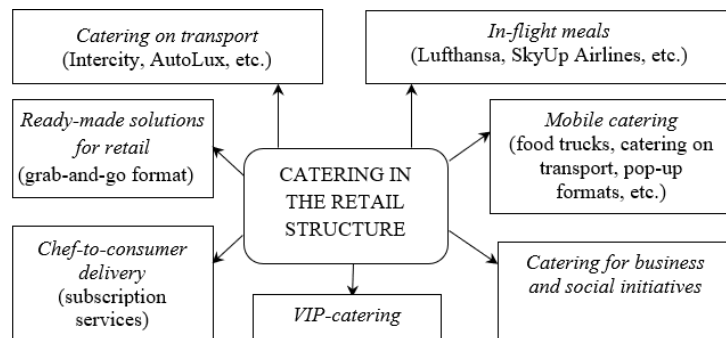


Figure 3. Forms of catering integration into retail.

Source: Author’s research.

As we can see, catering companies as subjects of the restaurant services market are also adapting to crisis conditions and are combining with retail and creating product diversification: ready-made meals in supermarkets, partnerships with gas stations, marketplaces, and carriers. Examples of such collaborations include Ocado Retail and Marks & Spencer, which in 2020 entered into a partnership to deliver ready-made meals and products to consumers [23]; Whole Foods and local catering companies [24]; METRO Cash & Carry [25].

In general, collaborations (permanent or temporary) between restaurant and retail entities are promising strategic decisions, allowing both sectors to expand their capabilities and offer customers new services. In the context of the economic crisis, changing consumer behavior and sustainable development trends, restaurant retail is also able to optimize resources and efforts, attract new customers and increase attention to brands.

3.2. Key trends in restaurant retail

In times of crisis, flexible forms of restaurant business management have proven effective, including the search and use of all possible sales channels that diversify income. Thus, scaling the business through collaboration with retail is one of the effective and trendy tactics of restaurants. The crisis experience of fluctuating lockdowns demonstrates the development of the following trends:

- Omnichannel sales (Online-to-Offline (O2O) business model), when all possible distribution channels are involved in the fulfillment process: direct and indirect;
- Local products and sustainable development, associated with environmental trends in business;
- Digitalization of relationships and distancing of services;
- Brand collaborations and creation of joint products (services).

That is why some economic entities are joining a noticeable global trend: the development of gastronomically oriented formats at the junction of retail and restaurant/catering.

The diversification of activities carried out at the same time contributes to the generation of additional sources of income.

To assess the prospects for the development of restaurant retail, we will examine market trends using the horizon scanning method in **Table 1**.

Table 1. Retail market horizon scanning markers in Ukraine.

Key markers	Horizon Scanning (Key Trends 2007–2025)	Effect (positive—«+», negative—«-»)
2007–2010: regional expansion of networks	<ul style="list-style-type: none"> • Geographical expansion of food retail, the share of consumer spending on products is over 40% 	+
2011–2015: development of retail parks, shopping centers and street retail	<ul style="list-style-type: none"> • Transformation of the “point of sale” format into the “showroom” format; • Emergence and implementation of mobile applications and QR codes 	±
2017–2025: market innovation (creation of a new market for goods/services)	<ul style="list-style-type: none"> • Formation of IoT, the market for digital products, digital services 	±
2019–2022: food collaborations	<ul style="list-style-type: none"> • Attention to healthy eating, Zero waste, Eco-friendly concepts; • prevention of threats of infection with the COVID-19 virus 	±

Table 1. (Continued).

Key markers	Horizon Scanning (Key Trends 2007–2025)	Effect (positive—«+», negative—«-»)
2020–2025: marketing innovation (development of a new source of supply of resources)	<ul style="list-style-type: none"> • Development of Data Science and digital platforms for selling resources, goods and services: buyers in social networks, marketplaces, distribution platforms; • Deepening of commercial omnichity; • Further development of digital marketing (chat bots, social networks, influence marketing); • Further development of Pick Up Point formats (McDonald’s “McPickUp”, KFC “Click & Collect”), Drive Thru and Walk-Up Windows (Starbucks Pick Up, McDrive); • Organization of Pick Up Zone, where customers can receive orders from several restaurants at once (Panda Express Pick Up, Food Hall Self-Pickup); • Introduction of drones and robotic delivery (Amazon, Uber Eats, McDonald’s) • Food establishments where there are no cash registers: customers simply take the goods, and payment is automatically taken via cameras and artificial intelligence (Carrefour Flash 10/10); • Countering military threats (blackouts, air alarms, staff shortage, business relocation) 	±
forecast for 2025–2030: collaboration between retailers and restaurant brands	<ul style="list-style-type: none"> • Retail development of local brands; • Stimulation of social commerce; cost reduction through kiosks and self-service checkouts; • Diversification of the use of cobots and robots in service; • Use of artificial intelligence to analyze customer preferences; • Diversification of the use of robot chefs and waiters; • Development of establishments that serve exclusively online orders; • Organization of virtual kitchens that provide real catering establishments with high-quality products and semi-finished products • Product quality testing to better achieve compliance with standards; • Growing relevance of Zero-Waste concepts and environmental friendliness (minimization of recycling, transfer of unsold dishes to charity through food collection programs) 	±

Source: developed by the authors based on [6,10,26–28].

The above forms the framing of the restaurant retail trendbook in Ukraine for the future, where the leading food retailers of the market are attractive for forming collaborations (see **Figure 4**).

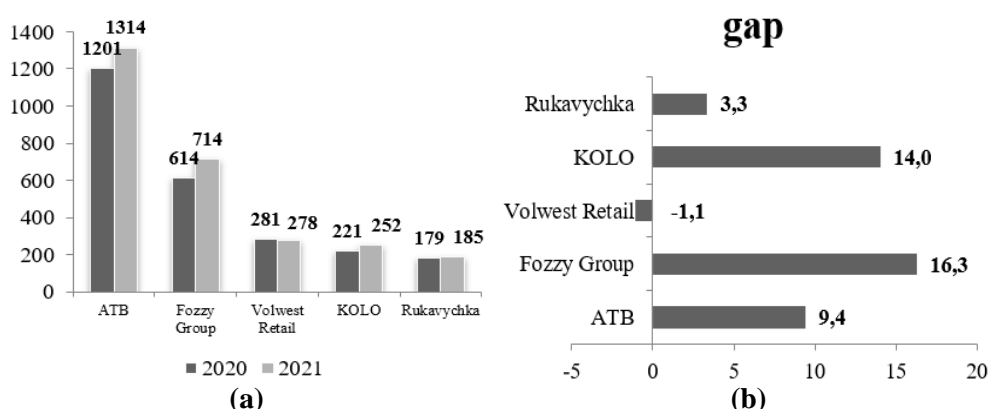


Figure 4. Dynamics of the development of retail outlets of leading food retailers of Ukraine, 2020–2021: (a) total number of retail outlets; (b) deviation, %.

Source: developed by the authors based on [29].

As we can see from **Figure 4**, all companies in 2021 scaled with an increase of at least +3%, except for Volwest Retail, which showed a negative gap of 1%. Two retailers out of five (KOLO and Fozzy Group) significantly expanded their networks,

increasing the gap from competitors. Therefore, restaurants should consider them as potential partners for joint projects.

Since the beginning of the full-scale war, Ukrainian food retail has experienced significant stress. However, it was able to recover and even achieve some development thanks to the establishment of logistics with European countries and the diversification of product lines, including restaurant retail (Figure 5). Overall, the industry recovered by 21.2% [24].

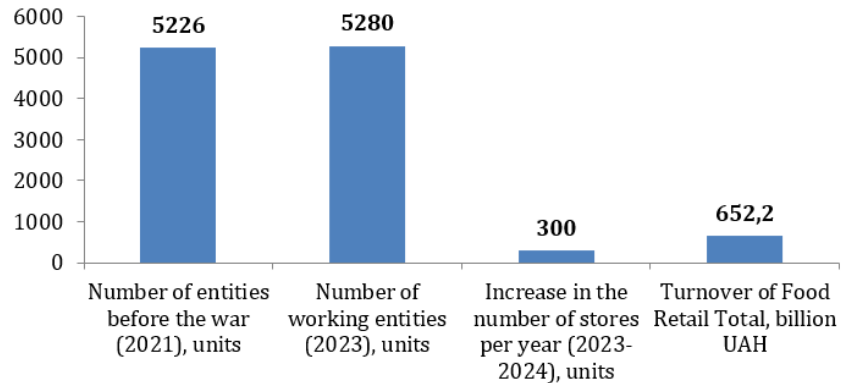


Figure 5. Development indicators of food retailers in Ukraine.

Source: compiled by [24].

Today, Ukraine’s economic environment is in an extremely risky area: military threats, complicated logistics, fluctuating power supply and mobile/internet communications. This imposes additional layers in the formation of restaurant retail development goals Figure 6.

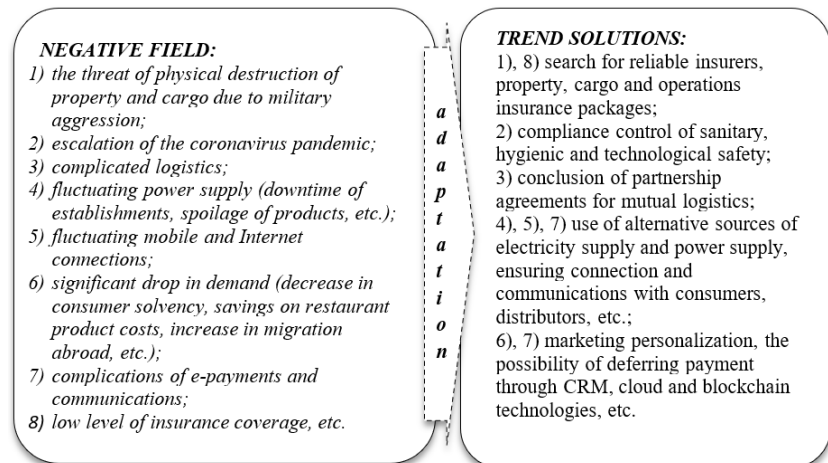


Figure 6. Restaurant retail trendbook in the crisis realities of Ukraine.

Source: Author’s research.

Accordingly, the described trend solutions are proposals for the formation of restaurant retail development strategies. Combining the content of the trend book (Figure 5) with the research insights of Figure 1 (chains of interaction between the restaurant business entity and the retailer), Figure 2 (forms of integration of the restaurant business in retail) and the practical experience described when scanning the

retail market horizon (**Table 1**), we will form a system of communication fulfillment of restaurant retail (**Figure 7**).

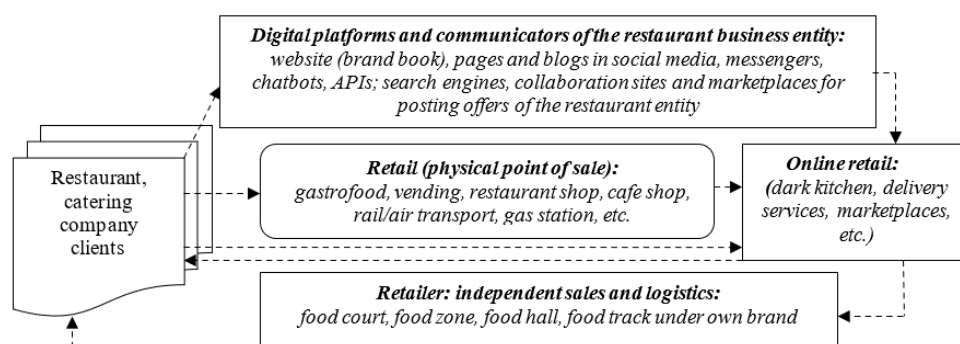


Figure 7. Restaurant retail communication fulfillment model.

Source: Author's research.

As we can see from (**Figure 7**), as a result of the client's communications with restaurant retail, the following fulfillment models are formed:

- Direct fulfillment can be carried out directly when the client personally applies for solutions on a digital platform or communicator to the restaurant business entity and places an order online; or makes direct purchases from the retailer (in a store, supermarket, which has created a food zone, food hall, food court, etc.);
- Direct tangential fulfillment has the following variations: first, when the client searches for a certain restaurant concept through a search engine, assesses the feasibility of visiting it through visitor reviews, opinions of opinion leaders (bloggers, experts or critics); second, orders a certificate or discount coupon on the marketplace (Pokupon.ua; Superdeal.ua; Skidochnik.com.ua, etc.); thirdly, using a geomap, they search for the nearest restaurant [9].
- Indirect fulfillment, when a client, contacting a website or mobile application of a delivery service (Bolt Food, Eda.ua, Glovo, Uber.eats, etc.), or a dark kitchen restaurant (Raketa, Glovo, Food tech, "Kitchen", "Silpo"), makes and pays for a restaurant product of a certain restaurant entity [30].

Understanding these processes facilitates marketing communications and indicates points of contact with consumers and retailers, as well as directions for diversifying the activities of restaurant business entities, which is important on the path to commoditization of the restaurant product and the formation of additional sources of income.

4. Discussion

The study of theoretical and practical aspects demonstrated the need for the development of business entities through partnerships and brand collaborations, in particular in the context of an adaptation strategy during crisis conditions in business. Thus, the Ukrainian restaurant business in the context of the coronavirus pandemic has mastered an adaptation model of restaurant retail, which has become effective even during the war (today's realities). This was argued theoretically (by analysis of scientific literature) and practically (by successful examples of restaurant retail formats both in Ukraine and in the world), which substantiates and confirms the

hypothesis put forward by us about the feasibility of transforming the restaurant business in the context of a crisis into flexible collaboration formats. Such strategic decisions are reflected in product diversification (new services, food and beverage design solutions) [7,8,10,13,29,31], diversification of sales channels (O2O communication model: ordering, delivery to consumers or service in a convenient and accessible location) [4,11,17,19,21,25,30], business diversification (new business formats: food courts, food zones, street points, food tracks, pop-ups, etc.) [5,9,11,16,18,23].

The created advantages are manifested in increased sales due to mutual promotion and expansion of the customer base, synergy (joining forces will allow creating a more attractive offer for customers, which can lead to increased loyalty), new opportunities for marketing (joint promotions, tastings and other marketing activities allow attracting new customers and increasing brand awareness). However, for successful cooperation, it is necessary to constantly monitor the market, study changes in tastes and preferences of the target audience and design effective products.

Thus, the integration of strategic partnerships between restaurant and retail entities contributes to increased sales and compliance with modern economic trends: personalization of products and services, increased convenience of communications for users due to omnichannel, maintaining high loyalty to brands, because consumers trust physical points of sale more.

5. Conclusion

Thus, the main tendencies and trends in the development of restaurant retail have been identified and systematized. These consist of the continued integration of restaurant formats into the activities of trade entities: supermarkets, shopping centers, etc. Combining the content of the training book with research insights (chains of interaction between the restaurant business entity and the retailer, forms of integration of the restaurant business in retail) and practical experience described when scanning the horizon of the retail market, a system of communication fulfillment of restaurant retail has been formed, which showed the optimal ways of marketing interaction. Thus, the hypothesis that during the crisis period, the restaurant business was transformed and caused the emergence of new business models and adaptive collaborations to increase the industry's sustainability was confirmed by practical insights into Ukrainian restaurant retail. Prospects for further research include studying the effectiveness of collaboration in the restaurant retail market during wartime in Ukraine and the results of the integration of Ukrainian food retail into European markets (in particular, Gastro Family and Lviv Croissants).

Conflict of interest: The authors declare no conflict of interest.

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