

## Ukraine

### Ukrainians are most satisfied with large retailers

Ukrainians are increasingly showing a preference for modern retail channels for buying food and non-food FMCG products, with 73% of buyers shopping in hypermarkets, supermarkets, or small self-service shops. The most popular retail chain is "ATB-market" with 14% of Ukrainians considering it their first-choice outlet. Convenient location, acceptable prices, and a wide range of products are the main reasons for choosing a specific outlet. Leaders in general customer satisfaction are "Karavan", Auchan, and METRO.

These are the results of the Retail Study in Ukraine, which was conducted by GfK Ukraine in November-December 2009.

#### Large retail chains are the main shopping places for Ukrainians

According to the 2009 results, the "ATB-market" retail chain strengthened its position significantly, retaining its leading position: 14% of the respondents consider it to be their main shopping place, that is 5 p.p. more compared to 2008. The "ATB-market" chain holds sway in the Eastern and Central regions of the country.

Second place is taken by the "Silpo" retail chain, which is preferred by 11% of Ukrainians (compared to 8% in 2008). This chain is the most popular in Kiev and the Western region. "Silpo" is followed by "Amstor," "Furshet," METRO and "Velyka Kyshenya" with a minimal gap between them (each chain is preferred by 5-7% of Ukrainians).

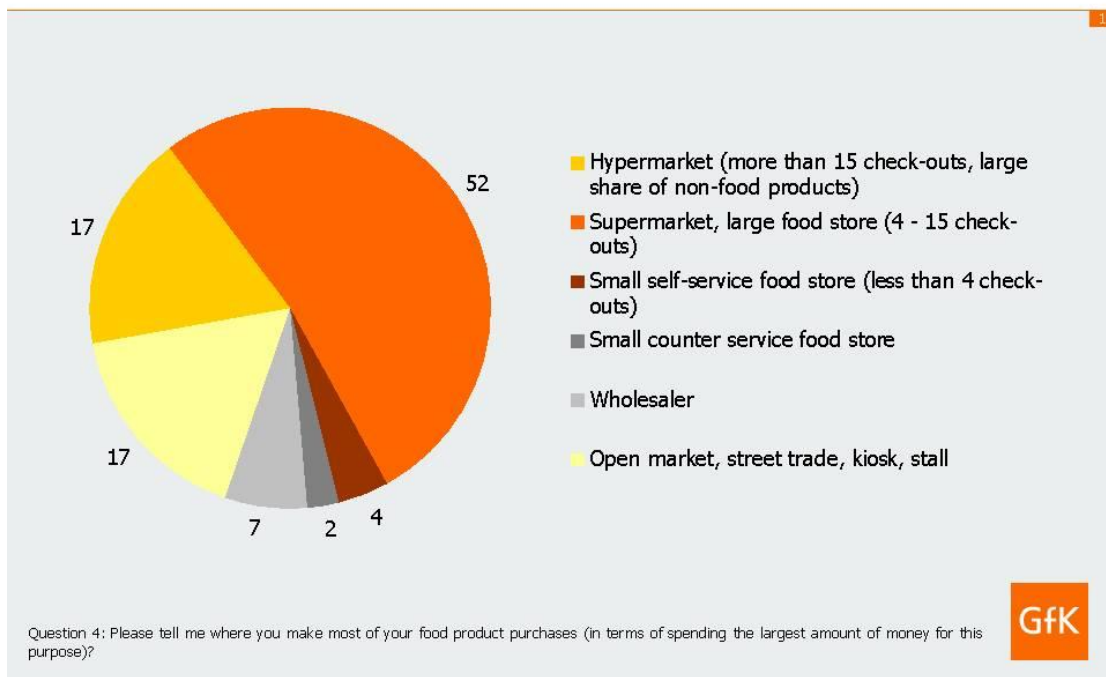
Overall, 73% of Ukrainians named hypermarkets, supermarkets, or small self-service shops as their preferred shopping venue choices in 2009, which is 5 p.p. more than in 2008. Regular open markets/bazaars remain the choice of 17% of Ukrainians compared to 22% in 2008. Buying the majority of their required food products at open markets is observed mainly amongst respondents from the Northern region, whilst it is least common amongst the residents of Kiev.

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### Main shopping place

% of respondents, N=1003



## How Ukrainians evaluate the performance of retail chains

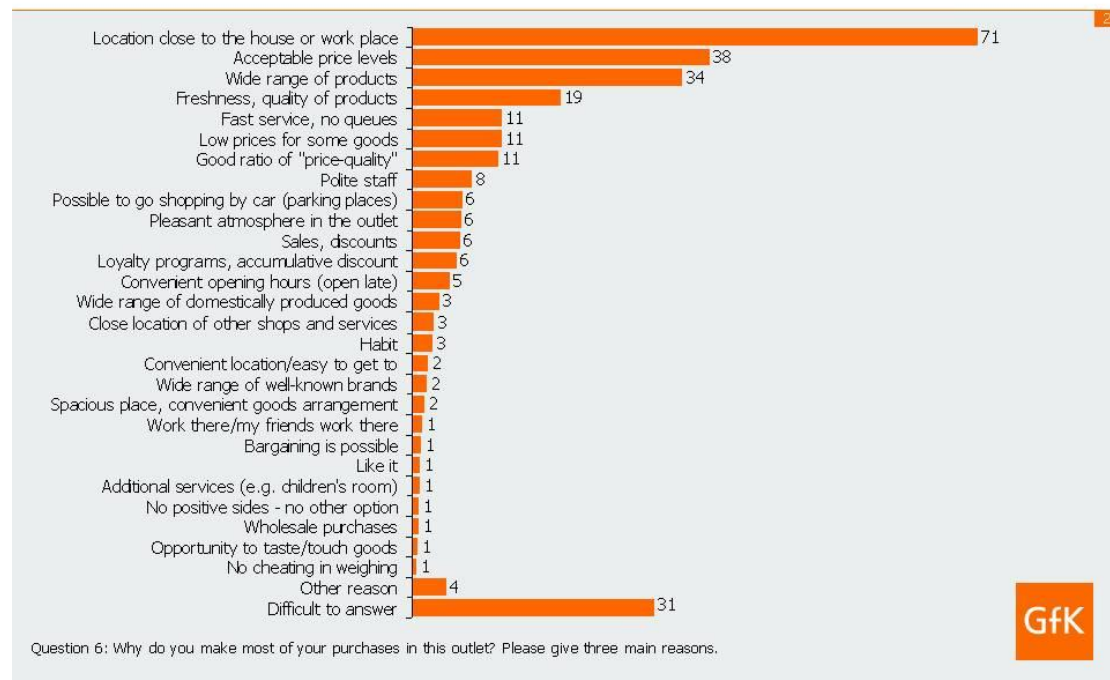
Amongst the main reasons for choosing a preferred place to make purchases are its convenient location near to home or work (70% of respondents), acceptable prices (38%), and a wide range of products (34%).

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### Major reasons for choosing outlet for the majority of purchases

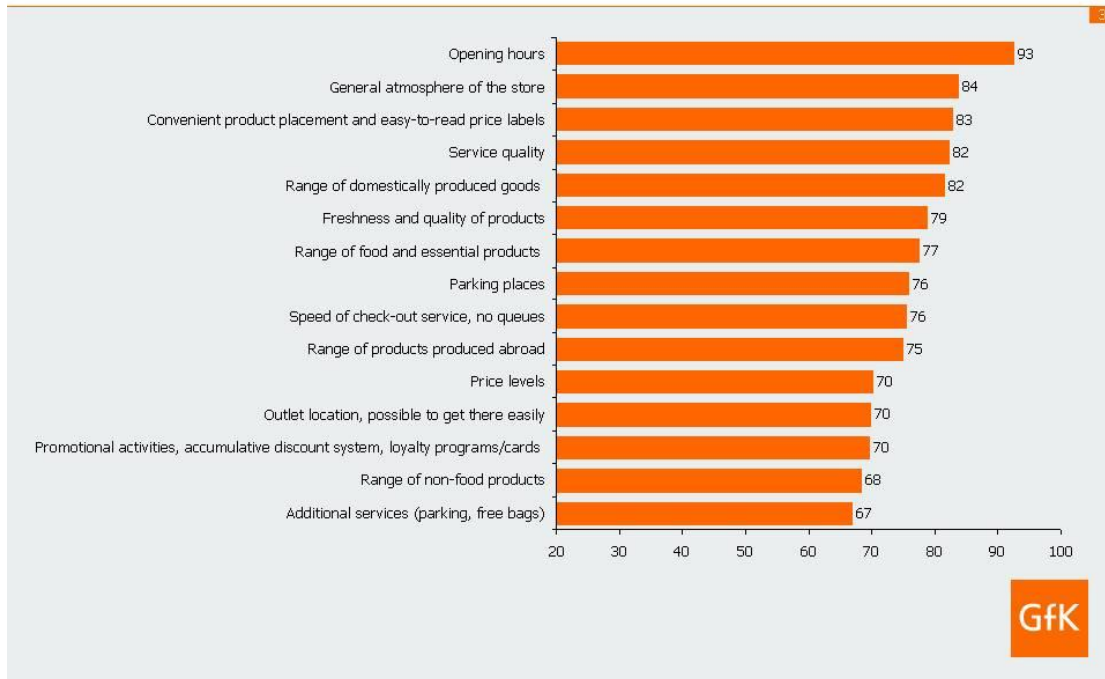
% of respondents, N=1003



Of all of the elements of retail chain operation, respondents were most satisfied with the opening hours and the general atmosphere of the store (product placement, cleanliness in the outlet) and least satisfied by the range of non-food products and additional services (packing services, free bags). Leaders with regard to general customer satisfaction are "Karavan," "Auchan," and METRO, which proves the perspective of the development of large retail formats in Ukraine.

## Satisfaction with retail chains offer

Average % of respondents, who are «completely satisfied» and «rather satisfied», N=1003



### Information about the survey

Research on the retail trade market in Ukraine in 2009 is based on a survey carried out in Ukrainian cities with more than 50,000 inhabitants. The sample consisted of 1003 respondents chosen at random. One person in a given household, responsible for making everyday purchases of food and non-food FMCG products, was chosen as a respondent. The maximum statistical error is 2.9%. The survey method is computer-based telephone interviewing. The survey was conducted in November-December 2009.

### Contact:

Tetyana Yablonovska  
Senior Researcher, Retail & Regional Studies  
Services Research

**GfK Ukraine**

34 Lesi Ukrainki blvd., off. 601

01601, Kyiv

Ukraine

Tel. +380 44 230 0260

Fax +380 44 230 0262

[tetyana.yablonovska@gfk.com](mailto:tetyana.yablonovska@gfk.com)

[www.gfk.ua](http://www.gfk.ua)