Ринок «Столичний»

POSITIONING · TRANSFORMATION CONCEPT 2.0

“In the new world, it is not the big fish which eats the small fish, it’s the fast fish which eats the slow fish”

– Klaus Schwab, founder of the World Economic Forum

Food Hub “Stolychnyi”: a big market becomes a fast one

Aleks Prykhodko



POSITIONING

Food Hub: formula, benchmark and scale



Fast modern ecosystems are partner channels, not competitors

Delivery platforms, dark kitchens and online retail plug into the market on its terms. “Stolychnyi” leads them instead of giving away its flows

Benchmark: Waterfront Market Dubai

Heritage + modern hygienic infrastructure + convenience + food and leisure. A market as a meeting place for generations, not a trip “like in 2005”

The scale is already here

37 ha · 500 kt per year · 1.5 M buyers · 500+ operating companies · 24/7. The goal is to turn scale into speed

HERITAGE OF THE LAND

This land has fed Kyivans since 1944. In the future it can become a Food Hub of national significance

1944
Pushcha-Vodytsia agro-combine
vegetables for Kyiv

→

Greenhouses
37 ha under glass
cucumbers, tomatoes, greens

→

2011
Rynok Stolychnyi
on former agro-combine land

→

Food Hub
growing on site
the market's waste heat
"grown here"

What we grow

Living greens and salads with roots, microgreens, cherry tomatoes, premium berries. Products where freshness in hours matters more than price: Premium and Lux tiers

Why here

Waste heat from refrigeration warms the greenhouses instead of venting through fans. The delivery leg is a few hundred metres from bed to shelf, with no trucks and no losses on the road

How it fits in

Traceability with a "grown here" mark · Living Greens module · tours and kids' classes in the events contour · a standard that scales to new markets with the model

PRINCIPLE **A return** growing here is not a new option but the land returning to its purpose: market heat → greenhouse → shelf → buyer in one loop

WHO WE SELL TO AND WHAT

Value for suppliers, buyers and against competitors

For suppliers

Sales and turnover without idle stock · fair prices through transparent categories · post-harvest services: sorting, sizing, packing, cooling, delivery · contracts, forwards and factoring against confirmed orders · access to retail chains and HoReCa

For buyers

Retail-grade convenience – categories, wayfinding, service points · trust – lot ID, documents, lab, temperature logs · speed – pre-orders, slots, delivery · source prices and choice

Against competitors

Other markets lose on convenience, cleanliness and digital. Silpo wins on ready meals: 54% of Europeans buy ready-to-eat, 77% of Gen Z buy food-to-go. The answer – source price and freshness + Market-to-Table + a long assortment tail

54 %

of Europeans buy ready-to-eat at least once a month

77 %

of Gen Z buy food-to-go monthly (McKinsey)

52 %

of the market's professional buyers are HoReCa

3,239

vendors on the vehicle trading platform in season

FIRST PRIORITY **90 days** digitise the buyer: who, how often, how long, what they buy, through which channel. If the market does not know its customer, a retail chain will know them better and take the flow

FOUNDATION

Categorisation: every income group finds its product

Economy

pensioners · large families · small shops · social canteens

off-grade sizes, discounted near-expiry, by the crate and sack, seasonal surplus

vs ATB and other markets

turnover instead of write-offs · “value crate” zone

Standard

middle class · weekend families

consistent quality, retail packs, ready-made kits

vs Silpo, Novus, nearby markets

fees for packing and labelling

Premium

HoReCa · upper middle · chefs

sized, with lot ID and documents, farmer stories, prep service

vs Silpo Premium, distributors

grading and certification · % of premium zones · delivery

Lux / Craft

affluent buyers · gifts · food tourists

craft cheeses, exotics, organic, Japanese strawberries, delicacies

vs boutiques, gastro markets

display fees · gift sets · private label “Stolychnyi Select”

PRINCIPLE **4 categories**

one product flow is sorted by size and genetics/quality into four prices and four buyers. The market grades, not the vendor – the category becomes the market’s promise. The buyer profile knows the segment: a pensioner gets a “value crate”, a restaurant gets a new Premium batch

FOUNDATION · HOW A CATEGORY IS ASSIGNED

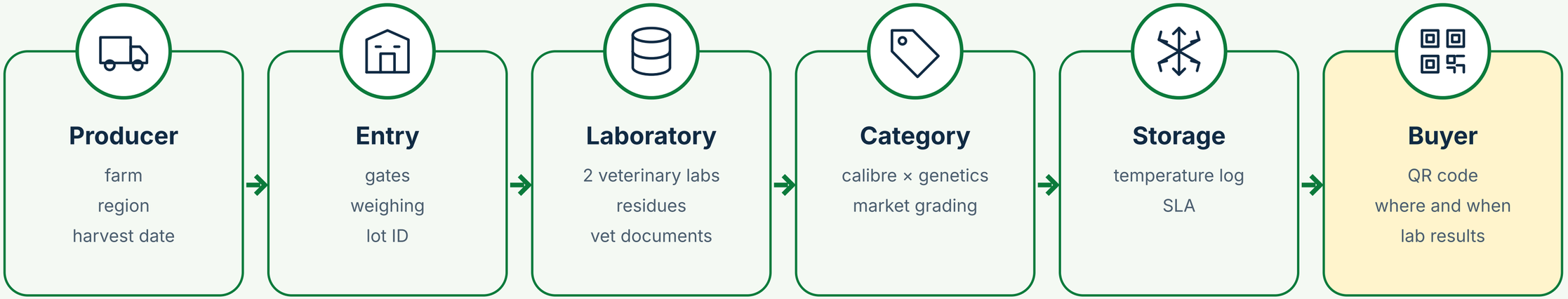
Category = size × genetics and quality

Group	Size / calibre	Genetics and quality
Fruit and vegetables	fruit diameter or weight, uniformity, shape	variety or hybrid · region · open field / greenhouse / hydroponics · BRIX · ripeness · defects
Berries and greens	berry calibre, bunch or pot weight	variety · BRIX · hours since harvest · living root (Living Greens)
Meat	carcass and cut weight, steak thickness	species and breed (Angus, Hereford) · age · grass / grain fed · marbling · dry-aging
Fish and seafood	fish weight, shrimp count per kg	species · wild or farmed · catch area · fresh / frozen · days since catch
Cheese and dairy	pack size, wheel / segment	cow / goat / sheep · craft or industrial · ageing · fat content
Eggs	S / M / L / XL by weight	housing system · hen breed · freshness
Dry goods, nuts, dried fruit	fraction, nut calibre	variety · country · harvest year · moisture

EXAMPLE **1 variety → 2 prices** the same tomato variety is Premium at calibre L and Economy at calibre S – the market sells both instead of writing off the small ones

TRACEABILITY

Traceability for every category: identical from Economy to Lux



Group	Origin in lot ID	Documents and lab	What the buyer sees via QR
Fruit and vegetables	farm, region, harvest date, variety; imports – country, importer	pesticides and nitrates, phytosanitary documents	farmer, harvest date, category, lab result
Greens and Living Greens	module, sowing and harvest dates	nitrates, spot microbiology	“grown here”, harvest day
Meat	farm, animal ID, slaughterhouse, slaughter date, breed	vet documents, market vet inspection, continuous t° log	farm, breed, slaughter date, ageing
Fish and seafood	species, catch area or farm, catch date	vet documents, freshness, glaze, t° log	species, origin, days since catch
Cheese, dairy, sausages	producer, batch, production date	producer declaration, ingredients, allergens, t° log	producer, ageing, shelf life
Dry goods, eggs, ready meals	country / farm / lot ID of market ingredients	import documents, aflatoxins, recipe	origin, shelf life, which market batches were used

TRUST AND DATA

Market OS: category, batch and price as a trust product

Verified vendors

Tiered profiles: baseline compliance, service level. Structured fields: taxonomy, pack sizes, minimum orders, delivery, certificates, SLA

Lot ID and digital documents

One batch format across the market: lab, certificates, photos, temperature logs. Ready for GS1 2D (Sunrise 2027) and fast batch recalls

“Stolychnyi” price index

Prices are now published three times a week for reference. Target – a methodology by category, more frequent updates for key SKUs, an API for HoReCa and distributors, forecasts. Paid market intelligence

Sanitation as a brand

2 veterinary labs, 400,000+ inspections a year, 60 sanitary days. As at Waterfront – the deep-cleaning schedule is open to buyers

B2B transactions

Quotes, standing orders, credit terms, claims, procurement analytics – the market becomes buyable online, like Rungis Market or Mercachef

Reliable digital channels

Website, vendor catalogue and documents always available and up to date. For institutional buyers this is trust infrastructure, not “IT cosmetics”

MARKET-TO-TABLE

Campus plug-in modules: from raw produce to ready meals

№1 Packaging

Breaking wholesale into retail packs, labels with category, date, batch, origin. Removes the barrier between the market and B2C/delivery

#2 “Second-life” processing

Juices and purées, freezing, drying, fresh-cut. The main tool for cutting losses and smoothing seasonal peaks (Mercabarna Foodback case)

№3 Dark kitchen / Ready-to-eat

Ready meals and semi-prepared food from the market’s freshest produce, delivery, brand content. Launch after the quality, data and cold-chain contours

№4 Greenhouse / Living Greens

Living product with roots: losses down to 5%. Modules for 220–300 portions a day, payback 12–24 months. Heat from refrigeration waste heat

№5 Circular

Organics → feed by barter / compost / biogas, packaging → sorting and baling, returnable crates

Prep-services

Fish cleaning and filleting, butchering and marinades, washing and cutting vegetables – the bridge between buying and cooking, as at Waterfront

ANCHOR **GastroHub**

Bakery Lab + Production Pods: demo centre and test kitchen (recipes, standards, R&D, content) + producer tenants of standardised SKUs: pastries, sandwich bread, burger buns, desserts for HoReCa and delivery

ROLES

What the market does itself, what it gives to partners, what it requires from anchors

The market itself – the “skeleton”

Market OS · quality standards and categorisation · gates, slots, ramps · core cold chain · energy and heat · waste contour · shelter. The skeleton stays in-house – otherwise control is lost

To partner-operators

Processing, dark kitchen, bakery pods, specialised workshops, biogas, delivery operator, crate pool. Operating skills matter more than owning hardware: lease/revenue share + KPI

Requirements for anchor tenants

Grading, lot ID, temperature logs, SLA for handling and claims · minimum guaranteed volumes · joining the write-off reduction programme · data feed to Market OS · mall-grade service

KPI FOOD HUB throughput

t/day and pallets/hour · queue SLA · losses and diversion rate as a financial metric · share of deals with lot ID · picking accuracy · repeat visits · share of ready-to-eat ingredients sourced from the market

Financial services for suppliers

Forwards and factoring against confirmed orders, trade credit insurance. An extension of the existing tenant deposit mechanism – once Market OS verifies transactions.

Why the resource contour strengthens the Food Hub instead of spreading CAPEX thin

Cooling runs 24/7

The market’s largest energy consumer – an ideal profile for on-site solar: everything generated during the day is consumed on site

Energy resilience = argument #1

Meat and fish tenants pay a premium for a guarantee that their cold room will not thaw. Autonomous cooling attracts the best operators

Waste is a raw material

10–25 kt of organics a year that the market currently pays to haul away. Diversion rate becomes a financial metric

Logistics = Market OS in hardware

Gates, slots, cross-dock – the one contour the market cannot hand to tenants, and the one point where every buyer is visible

KEY EFFECT

The market stops being only a landlord and becomes the operator of its own infrastructure for energy, heat, waste, flows and buyer data. Every contour fits the concept’s grant rule: a grant funds what has an OPEX model and an accountable operator.

Market baseline data used in the estimates

37 ha
site area

40,000 m²
covered area – roofs for PV

17,000 m²
refrigerated area + 11,000 m³ of cold rooms

5,000 veh./day
traffic · 1,000 parking spaces

1.5 M
buyers per year · 52% of professionals are HoReCa

500 kt
annual turnover

155 agreements
with village councils – a channel for return flows

1,791
seasonal producers on the vehicle trading platform

Sources: “Rynok Stolychnyi” brochure 2019, kyivopt.com. All figures in this presentation are indicative estimates and will be refined at the design stage.

CONTOUR 1

Energy: on-site generation for cooling

Goal – cover 20–30% of the market's annual consumption and 100% of the daytime cooling load, and make critical cooling and IT independent of grid outages.

- **Rooftop PV** on A4, B1, B2 and the vehicle-trading canopy: phase 1 – 2 MW, phase 2 – carports 1.5–2 MW
- **BESS 1 MW / 2 MWh** for the critical load: meat, fish, cheese, bananas, servers, gates
- **Energy management:** metering per cold room, "cooling as a service" tariff, data in Market OS
- No net billing needed – the market consumes everything itself; the project does not depend on feed-in tariffs





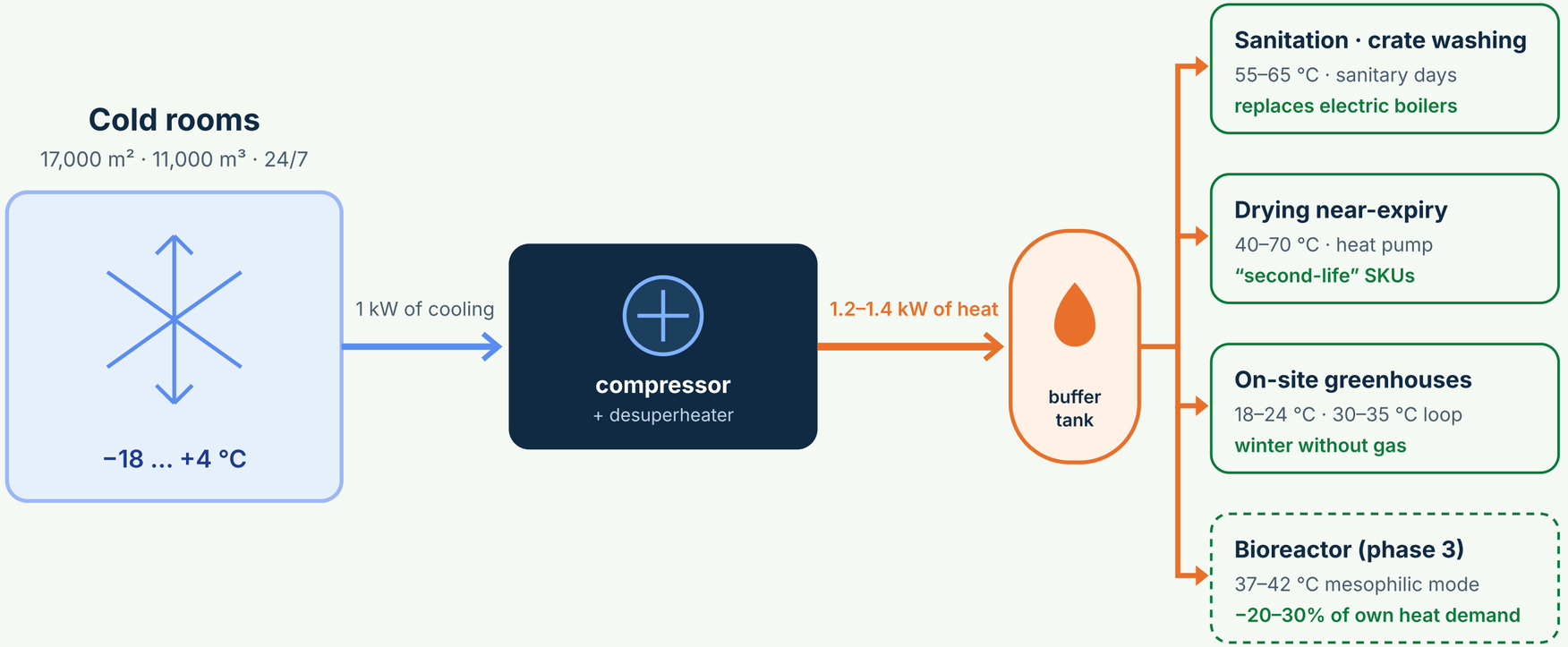
CONTOUR 2 · HEAT

Every kilowatt of cooling releases 1.2–1.4 kW of heat

Today the market pays for it twice: electricity for compressors and for condenser fans. Heat recovery turns this waste into free hot water, drying and greenhouses.

CONTOUR 2

Heat: refrigeration waste heat becomes a free resource



ROLL-OUT ORDER **1.5–2.5 years** indicative payback of heat recovery on hot water alone · first an audit of refrigeration groups, then desuperheaters + tank on the largest compressor groups · heat pump – when drying and greenhouses launch



CONTOUR 3 · WASTE-TO-VALUE

10–25 kt of organics a year – a raw material, not a cost

Sorting yard with scales, cardboard balers, compost and near-expiry processing. Diversion rate becomes a financial metric for the market.

CONTOUR 3

Waste-to-value: flow hierarchy and honest economics

1. Near-expiry → processing

drying, freezing, purées, juices, fresh-cut
highest margin · module #2 · dark kitchen

2. Edible → donation

charity kitchens, armed forces, social canteens
tracked by lot ID · Foodback model (Mercabarna)

3. Organics → feed / compost / biogas

vegetable fraction to farmers · in-vessel compost
AD only in phase 3 · 10–25 kt per year

4. Packaging → sorting and resale

baled cardboard and film = revenue
wooden crates → wood chips · returnable crates with deposit

Value hierarchy: most valuable at the top · KPI = diversion rate, the share of waste kept out of landfill

Phase 1 · quick start

Sorting yard with scales and per-tenant tracking · balers for cardboard and film · “sorted is cheaper than mixed” tariff · in-vessel compost pilot of 1–2 t/day

Biogas – phase 3 only

15 kt → 3.5–4.5 GWh of electricity and as much heat, but the plant does not pay back on energy alone. Economics = avoided landfill + gate fee + replaced energy + digestate for farmers. Only with an operator and a 40–50% grant.

CONTOUR 3 · BARTER

Organics → animal feed by barter

F&V pavilions

plant fraction only

kept apart from meat and fish

Sorting yard

weighing

lot ID

market vet control

Backhaul

farmer collects the feed

with own transport

Settled in kind

Economy-category discount

priority on seasonal produce

volumes for reserves

Cattle · goats · BSF

animal feed

larvae → feed protein

EFFECT **zero cost**

to remove the plant fraction · loyal supplier · cheaper produce for the Economy category · barter tracked by scales and handover record

Veterinary safety – a critical condition

African swine fever circulates in Ukraine, so only the plant F&V fraction becomes feed, with no contact with meat, fish or kitchen food waste – these must not be fed to animals. Every batch passes vet control. BSF larvae are a separate line for phase 2.



CONTOUR 4 · LOGISTICS

The market manages flows like an airport

5,000 vehicles a day is an undigitised asset. Gates, slots, cross-dock and consolidated HoReCa delivery in reefer e-vans.

CONTOUR 4

Logistics: the market manages flows like an airport

Digital gates

plate recognition
prepaid entry
Fast line on all lanes

Slots and pricing

booked windows
cheaper at night
Fri–Sun peak costs more

Cross-dock

orders from many tenants
lot ID
temperature zones

Delivery 04–09

reefer e-vans
HoReCa windows
daytime solar charging

Backhaul

farmers never leave empty crates
compost, digestate

WHY NOT LEAVE IT TO TENANTS 90 days

gates and slots are the one point where the market physically sees every buyer and every batch. Licence plate + payment + slot = an identified buyer, without persuading 700 vendors to keep records

Contour KPIs

entry-to-exit time by buyer type · share of slot-based entries · share of HoReCa turnover via consolidated delivery · share of loaded farmer backhauls · pallets per hour at the cross-dock



CONTOUR 5 · BUYER

A buyer known by name

Profile, reserves, personalised delivery and a loyalty programme. Chains win not on price but by knowing their customer – the market sees them in person.

CONTOUR 5

Buyer: digitisation, profile, repeat sales

1.5 M anonymous visits a year → profiles with history, reserves, personal delivery and a loyalty programme. Chains win not on price but by knowing the customer. The market sees them in person – so it can know them better.



Personalisation, convenience and motivation: what each side gets

Buyer profile

Type (restaurant, shop, family), favourite vendors, volumes, visit schedule. Personal prices and reminders when a favourite product is in season. For the market – segmentation and demand forecasts for farmers

Reserves and pre-orders

A batch or crate booked before arrival, price locked, seasonal produce (strawberries, cherries) reserved by lot ID. For the market – planned picking at the cross-dock, prepayment, fewer write-offs

Personalised delivery

Time window, temperature mode, repeat order “same as last week”, one invoice across several tenants. For the market – HoReCa retention and predictable turnover

Loyalty programme

Standard / Pro / Partner tiers, rewards for frequency and volume, priority entry slot, free crate washing, discounts on sorted-waste collection. Slot and sorting discipline without fines

Retail-grade convenience

Wayfinding to the vendor, e-documents and certificates by lot ID, Fast line by profile, cashless payment. Less time on site, data on every transaction

Repeat sales

KPIs: share of identified visits · repeat purchases within 30 days · share of turnover via reserves · HoReCa retention over 12 months · programme participation · NPS by segment

HOW NOT TO FAIL **no app** first 90 days – licence plate at the gate + messenger bot. The profile is shared: vendors see their own customers, otherwise tenants will see it as the market taking their clients. Rewards are funded from energy and waste savings, not from tenants’ margins

CONTOUR 6 · EVENTS

A seasonal calendar that brings visitors in and keeps them coming back

Winter

St Nicholas Day · Christmas Eve and Christmas · New Year · Epiphany

Christmas fair · kutia and the 12 Christmas Eve dishes – masterclasses · Lux gift sets · hot food in the garden

meat, fish, cheese, nuts, gifts

Spring

Easter · Mother's Day

Easter fair – paska bread, dyed eggs, pysanka painting for kids · seedling festival with the Gardening Centre · first greens

baked goods, eggs, cheese, seedlings, microgreens

Summer

Constitution Day · Independence Day · Honey and Apple Saviour feasts

strawberry and cherry festival · Ukrainian producers' fair · preserving with chefs · evening markets

berries, fruit, honey, greens, barbecue

Autumn

Day of Defenders

harvest and pumpkin festival · cheese and wine weekend · fair for military families

winter vegetables, preserves, cheese, wine

WEEKLY **52 events/year**

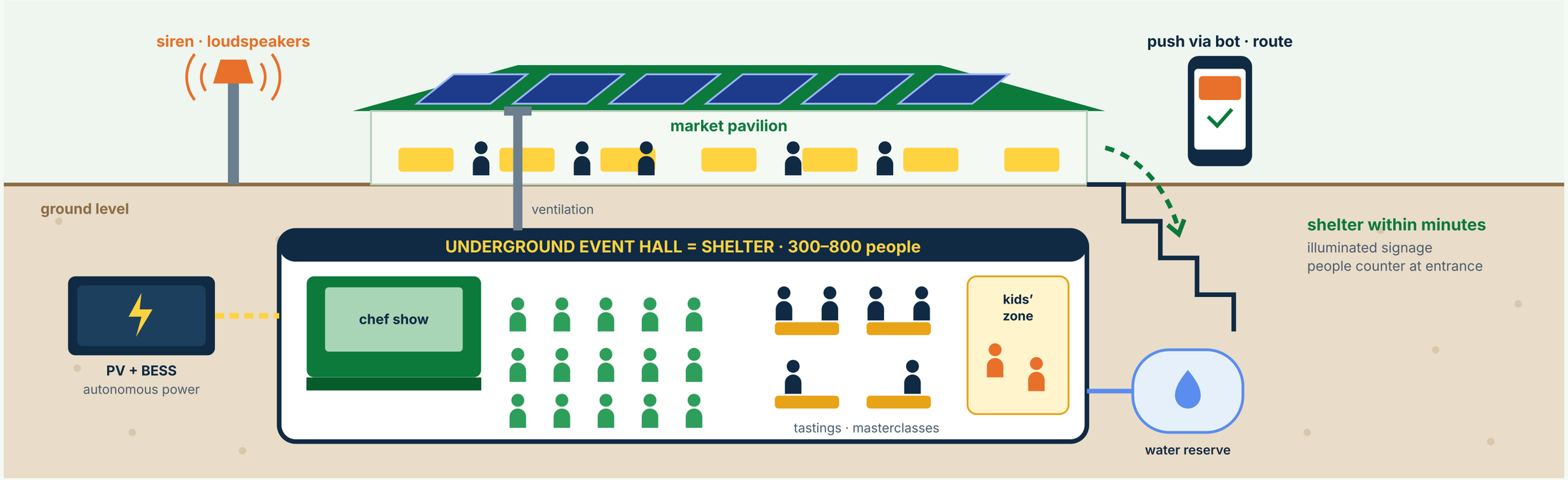
GastroHub chef series · kids' cooking classes · farmer weekends · tastings of new SKUs · "visitor passport" – regularity builds habit, festivals create traffic peaks

How the market earns

vendor fees for fairs · brand sponsorship · masterclass tickets · event-space rental · higher turnover on event days. Event registration = a new buyer profile and a reward. KPI: event visitors returning within 30 days.

CONTOUR 7 · SAFETY

Air-raid alerts don’t cancel events: a shelter that is an event hall in peacetime



Peacetime

event hall for 300–800 people, tasting room, cooking studio, kids’ centre, cinema, lecture hall

Alert

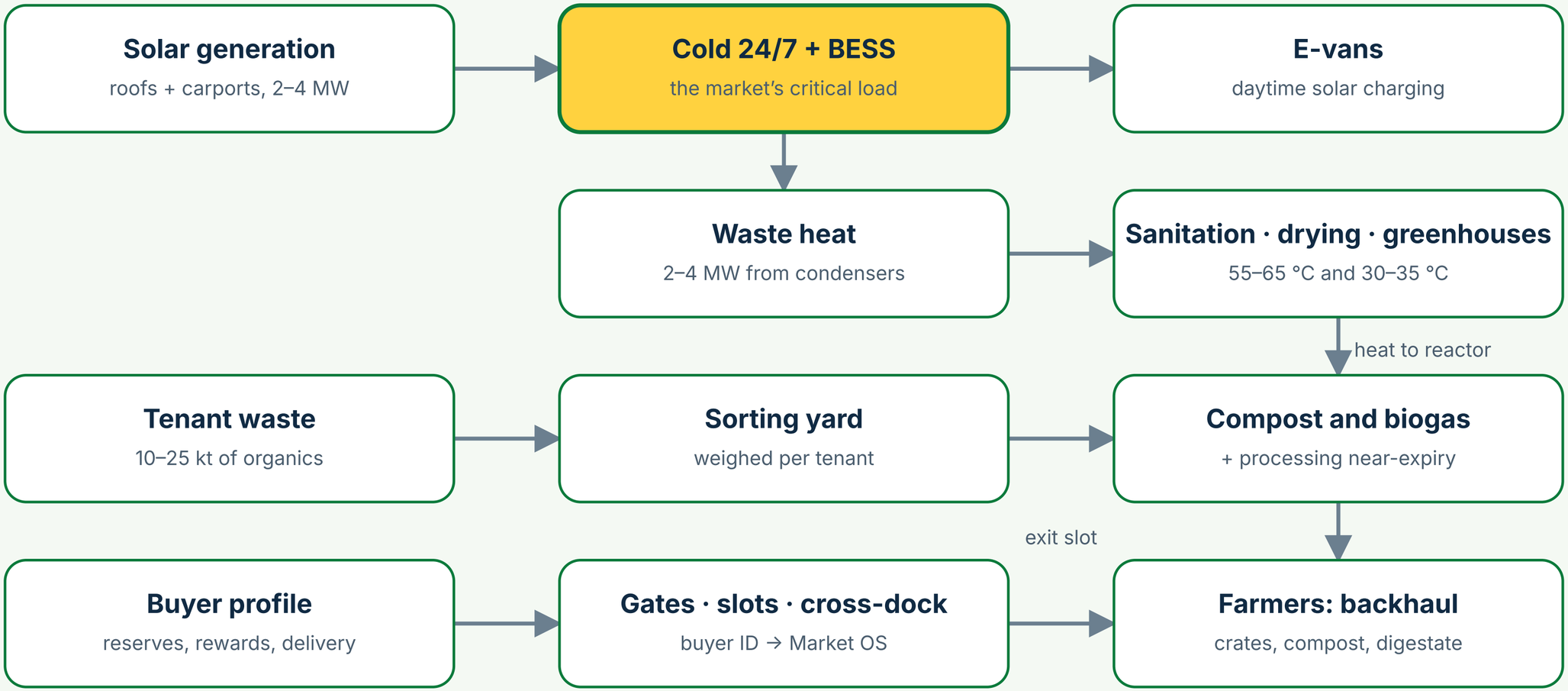
shelter with ventilation, water, toilets, connectivity and lighting. The event programme continues without cancellation

Blackout

autonomous power from PV + BESS, the market’s water and food reserves, a resilience point for the district

Phase 1 – alerts, wayfinding and a tenant protocol. Phases 2–3 – a dual-use underground space built to current Ukrainian shelter codes (DBN).

One resource contour: how the contours feed each other



Cooling sits at the centre: the sun powers it by day, its heat feeds sanitation, drying and greenhouses. Waste goes through the sorting yard and returns to farmers on backhauls that the market sees at the gates. The same gate contour builds the buyer profile.

Phasing: first what pays for itself, then what needs an operator and a grant

1 Phase 1 · Foundation

0–12 mo

- categorisation + grading
- 2 MW PV + BESS
- desuperheater + tank
- sorting yard + feed barter
- digital gates + buyer ID
- alerts and shelter wayfinding

own funds · concessional loan

energy and disposal savings

payback 3.5–4.5 years

2 Phase 2 · Services

12–30 mo

- PV carports
- heat pump
- cross-dock
- personalised delivery
- returnable crates
- in-vessel compost
- loyalty programme
- seasonal event calendar

market · grant · delivery partner

new revenue: delivery, crates, cooling

payback 3–5 years

3 Phase 3 · Production

30–60 mo

- biogas + CHP
- CO_2/NH_3 refrigerants
- greenhouses on waste heat
- underground event hall / shelter
- BSF line

operator · grant

energy, gate fee, digestate

payback 3–4 years with a grant

SCALING

“The farmer grows – the Food Hub manages”: a model that scales to emerging markets

Iraq

Rebuilding sales chains · working with smallholders · basic grading, cold chain and export channels. Sun + cooling + water is the core argument

Saudi Arabia

Integration with food security programmes · contract farming · strict traceability standards · B2G and HoReCa

Vietnam

High yields and seasonality · exports · potential for “second-life” processing and surplus-to-value

Core

quality standards
Market OS
farmer contracts
logistics and data

Local adaptation

consumption culture
climate and seasonality
regulation

Pilot → cluster → network

pilot hub
farmer onboarding
regional roll-out



RESULT

A market for every income group – with its own energy, zero waste to landfill, full traceability, managed flows and buyers known by name. Indicative payback of phases 1–2: 3–5 years.

Aleks Prykhodko