**Peculiarities of state regulation of food retail in St. Petersburg and medium-term prospects for its development**

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**Abstract**

**Research background:** The problems and prospects for the development of trade in food products in the world's major metropolitan areas, including St. Petersburg, have been the area of scientific interests of the authors of the article for many years.

**Purpose of the article:** With global shifts in world markets due to various causes, food trade has undergone significant changes around the world. Among the consequences of these changes, one should single out the accelerated growth in food prices. In an attempt to contain cost-push inflation, countries resort, among other things, to measures of state regulation of food markets. Taking into account the place and role of the food market in St. Petersburg, we have set the task to analyze the features of its state regulation and, on this basis, anticipate the medium-term prospects for its development.

**Methods:** Generalizations of the research are based on the processing and systematization of data obtained from available information sources. By analyzing the statistics, the authors were able to deduce the trends of the current moment and determine the prospects.

**Findings & Value added:** An analysis of expert research and the macroeconomic situation in the country made it possible to identify the main trends in the development of food retail in St. Petersburg in the medium term.

**Keywords:**  *food networks; pricing policy; virtual reality in e-commerce; marketplaces*

**JEL Classification:** *C43; D12; D21; D43*

**1 Introduction**

Having originated in the United States at the turn of the 19th - 20th centuries, the format of retail chains has spread throughout the world, and the first retail chains in Russia appeared at the end of the 20th - beginning of the 21st century.

COVID-19 has had a global impact on retail across the globe. Retailers have had to prove themselves in the area of corporate social responsibility (CSR) like never before (Kadekova et al., 2020). Merchants were forced on the one hand, to adapt to massive changes in consumer behavior patterns (Sheth, 2020), and on the other hand, to offer buyers their new consumption business models. An example is the model of the so-called "sharing economy", the essence of which is the collective use of various consumer goods on a lease or exchange basis. Thanks to it, a new culture of consumption was formed, which changed the attitude towards property (Hollowell et al., 2019). Another example is the exponential expansion of e-commerce (Stefko et al., 2019; Dsouza & Sharma, 2020).

Various aspects of the state and prospects for the development of food retail in St. Petersburg have long been the sphere of scientific interests of the authors of the article. Over the years, we were interested in the level of concentration and competition in the food market, the pricing policy of the main players (Dengov et al., 2016; Maksimov et al., 2016), a comparative analysis of the food markets in Moscow and St. Petersburg (Gregova et al., 2018) , pricing strategies of food retail chains in the face of global competition and the place of their private labels in this struggle (Tulyakova et al., 2020; Gregova et al., 2020).

**2 Subject and basis of the study and methodology**

In our article, we conducted a study of the regulatory impact of the state on the food trade in St. Petersburg and identified new trends in its development during the pandemic period and the period of adaptation to anti-Russian sanctions. We had to determine what changes had already taken place and what more should be expected. The factual and statistical basis for the study was information obtained from official open sources, such as retail.ru, infoline.spb.ru, rbc.ru, gov.spb.ru, etc. During the study, we used the methods of statistical and system analysis. The preliminary hypothesis was that despite the objective difficulties, this sector of the economy has quite successfully adapted to the new circumstances.

**3 Results and Discussion**

A feature of Russian retail trade networks has become the presence of different formats in terms of scale, penetration and turnover - federal and local, or regional networks. The development of trade in the format of "chains" in the region, the growth of competition between federal and regional chains contribute to curbing price increases and motivate retail chains to improve the quality of service. At the same time, it must be taken into account that the promotion of retail chains should be consistent with the normal conditions for the functioning of small businesses, which also perform important social and economic functions.

**3.1. Peculiarities of state regulation of food retail in St. Petersburg**

The main normative act regulating the activities of food retail in St. Petersburg is the law "On State Regulation of Trading Activities in St. Petersburg". Since 2014, within the framework of the state program "Development of Entrepreneurship and the Consumer Market of St. Petersburg", the subprogram "Development of wholesale and retail trade, public catering, consumer services and the sphere of funeral services" has been implemented The main tasks of the subprogram:

- ensuring a balanced development and deployment of infrastructure for wholesale and retail trade, public catering, consumer services and funeral services in St. Petersburg;

- creation of conditions for increasing demand for goods of Russian manufacturers and increasing the economic accessibility of goods and services for the population of the city.

Program indicators and results are shown in Table 1.

**Table 1.** Subprogramme indicators and results

|  |  |  |
| --- | --- | --- |
| Indicator name | Target value for 2021 | Actual value for 2021 |
| Retail trade turnover, billion rubles | 1 602,2 | 1 875,4 |
| Index of physical volume of retail trade turnover in comparable prices, % | 102,0 | 115,0 |
| Turnover of public catering per capita, thousand rubles | 13,8 | 18,9 |

Source: SPb IAC (2022)

The turnover of network retailers exceeded the figures planned for 2021. And this despite the fact that the consumer market of the city was under the influence of anti-COVID legislative restrictions. At the same time, the trade turnover of retail food chains amounted to 1,875.4 billion rubles, which is 15% more than in 2020.

The annual report “On the state and development of the competitive environment in the markets of goods, works and services in St. Petersburg” of the Committee for Industrial Policy, Innovation and Trade of the Government of St. Petersburg monitors the level of competition by industry, customer satisfaction, and the state of the market in the reporting period. Thus, the city authorities are developing the basis for administrative and regulatory measures in various sectors. The 2021 report assesses the level of competition in the retail market as “high”, with the share of the private sector over 80%. In addition, much attention is paid to assessing the quality of goods and services in retail chains. For this purpose, social networks and instant messengers are monitored. In St. Petersburg, information on checking the quality of food products sold in chains is very popular, and the city government monitors this information (Table 2).

**Table 2.** Information on compliance with the quality of products in the retail chains of St. Petersburg (by groups in the VKontakte network)

|  |  |  |  |
| --- | --- | --- | --- |
| Community name | Link | Number of subscribers as of 10.10.2021 | The number of reviews for low-quality goods from 01.01.2021 to 10.10.2021 |
| Blacklist Peter | hhtps://vk.com/stoplistspb | 52727 | 85 |
| Protection of consumer rights | hhtps://vk.com/spbpotrebitel | 10693 | 7 |
| Overheard in DIXY | hhtps://vk.com/dixi\_ru | 4474 | 1 |
| Protecting the rights of citizens in SPb | hhtps://vk.com/czpgspb | 2461 | 4 |
| Public control | hhtps://vk.com/club85554982 | 1600 | 38 |
| Overdue patrol | hhtps://vk.com/prosrokspb | 667 | 20 |

Source: Administration of St. Petersburg (2022)

On March 1, 2022, retailers signed a voluntary agreement to limit the markup to 5% on certain socially important food products. The mandatory list includes products from the categories of dairy products, bakery products, vegetables, sugar. Retail chains must choose specific names themselves. There were 276 such goods in Magnit's assortment, 150 each in Pyaterochka and Perekrestok. At the same time, private labels do not fall under these restrictions. As the experts emphasize, “the margin cap option is more flexible than last year's agreements on fixing wholesale and retail prices for sugar and sunflower oil, and is also more adequate to the current unstable conditions. The intensification of inflationary processes and the impossibility of state regulation of prices will stimulate the expansion of the practice of such agreements for other positions and categories as well.” (Polukhin, 2022).

In general, the trend of opening discount stores is currently developing in St. Petersburg. For example, antimonopoly restrictions that are aimed at containing the X5 Group chain are not an obstacle to the development of Chizhik stores of the same chain, since the chain has the right to reformat outlets within the allowed market share of the city. This allowed the chain to open 163 new outlets in July-August 2022.

In contrast to retail in Europe and the USA, in Russia, the participation of the state in the FMCG industry is obvious. For example, “since 2018, VTB has been the largest co-owner of Magnit. At the same time, the bank remains a key financial partner of the network: it issues Magnit debit cards, and also launched a payment service with expanded functionality Magnit Pay. Both Magnit and Lenta have said they will finance takeover deals with their own funds and unused credit line balances. At the same time, both companies borrow mainly from state-owned banks - VTB and Sberbank. (Prostakov, 2021).

To a certain extent, this became the basis of the development model, the desire for which was declared by the management of X5 Group:

1. Commitment to the goals of sustainable development in unity with society and the state.

2. Implementation of ESG principles in corporate culture, purchasing activities and social responsibility programs. ESG stands for environmental, social and governance indicators of sustainable development at different levels - from small companies to corporations and countries.

In the past few years, with the growing understanding of the environmental and social pressures of today, the principles of ESG have become popular and have reached the level of public awareness of their importance.

ESG data tends to reflect non-financial factors in overall performance that have traditionally been missing from financial analysis: an organization's energy and water management, waste generation, employee rights and working conditions, and more traditional measures of organizational accountability and transparency. The ESG brings together and systematizes almost everything that reflects how an organization works in society and the environment, and whether that mode of operation is sustainable and responsible.

3. Digital transformation as the basis for making "managerial decisions based on big data and artificial intelligence" (Lvov, 2020).

These trends, proclaimed by the state, affect the business models of Russian retail. The influence of the state on the activities of food retail is also associated with forced regulatory activities in the situation of sanctions restrictions. This regulation includes the permission of parallel imports. With regard to federal networks, it concerns the supply of household chemicals, hygiene products and cosmetics. The state accepts the risks of claims from the right holders, but this does not negate the special legal control and expertise on the part of the largest players in the FMCG industry: “in order to defend your right from any claims, it is important that the import by the entrepreneur is carried out in accordance with the legislation in force at the time import” (RGRU, 2022).

In a situation of rising logistics costs and sanctions for regional retail, the issue of competition with federal networks is especially acute. Under these conditions, the business model that is traditional for regional retail trade is relevant - convenience stores and mobile trade under the brands of retail chains as a guarantor of product quality and a loyal pricing policy.

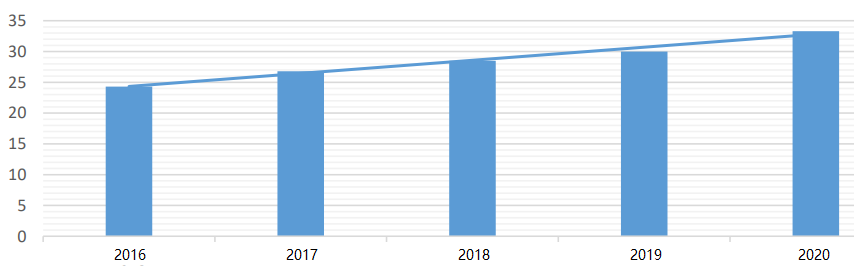
At the same time, it is natural to increase the share of domestic retail due to the withdrawal of foreign producers and retail chains from the market. Thus, a certain retail business model is also formed, which takes into account, for example, the former name of the retail chain, to which consumer loyalty of customers has formed.

Thus, the situation on the commodity food market is developing in the context of restrictive measures, a decrease in the growth of the purchasing power of the population, but also an increase in revenue. The restrictions imposed by the regulator relate to sanitary measures, pricing policy, quality of goods and services. Due to the fact that the opening of large retail outlets for networks has become less relevant, antitrust restrictions are not so sharp. Retail chains can redistribute the format of stores within the available volumes of retail space, and now this is happening in favor of discounters.

**3.2. Trends in the development of retail in the medium-long term in St. Petersburg**

Retail development trends depend both on the strategies of retailers and on the macroeconomic situation. In the first case, they are usually formed by large federal players, in the second case, regional representatives of the FMCG industry and the state are actively involved.

The influence of large federal players must be taken into account because their influence on network trading is only increasing. And this is a global trend: “a high degree of concentration of the retail market is typical for Germany - the 5 largest retail operators control 65% of the market share, Great Britain - 4 networks occupy more than 70%, France - 5 largest networks control 85%, Denmark - 2 leading networks share between represents 60% of the market” (Belova and Verona, 2021). In Russia, the consolidation of the FMCG industry is lower, but it shows a steady trend (Fig. 1).



**Figure 1.** Share of TOP-10 largest federal food retail chains, %

Source: compiled by the authors based on Belova and Verona (2021)

One of the trends reflecting the relationship between the economic development of retail and the social responsibility of business is the compliance of retail strategies with the national development goals of the country. The strategic programs of federal retail chains are being brought into line with such government objectives as maintaining the health of the population, a comfortable environment for life and effective entrepreneurship.

For example, X5 Group sets an example in this regard by implementing the social projects “Kindness Basket”, “Safety Island”, “Healthy Habits Route”, developing “green marketing”. In addition, the retailer's management set the task of organizing an infrastructure for the collection of secondary raw materials and packaging, reducing greenhouse gas emissions by 10% by 2023, increasing by 355 the volume of products that are recycled instead of disposed of (Lvov, 2020).

An analysis of expert research and the macroeconomic situation on the market allows us to identify the following trends in the development of retail in the medium-long term for St. Petersburg:

- development of a delivery service for federal and regional retailers, which will focus not only on the product range, but also on non-grocery items from the SKU of the outlet;

- development of private label assortment not only for federal, but also for regional players, including discounters;

- maintaining a high level of product quality at "hard discounters" that enter the market of St. Petersburg, including the development of private labels of the middle price category, which will be sold only in retail outlets of the city;

- the growth of the "green" economy and marketing, the allocation of a "green shelf" in all federal chains with the prospect of developing individual retail outlets under the auspices of large retailers;

- digitalization of trade: active development of online stores, joint marketplaces, digital service zones and mobile applications. In addition, “the development of category management, as well as the digital sphere and e-commerce, remain the priorities of retail trade. Innovative technologies are the present and future of Russian trade, in which assortment forecasting, depending on external factors, the opening of new stores from geo-forecasting, personalization of purchases is already becoming a reality today.” (Belova and Verona, 2021).

Retailers in St. Petersburg can contribute to the development of another trend, which was revealed as a result of a change in the assortment matrix of retail chains due to sanctions and disrupted supply chains: the introduction of mid-priced delicatessen products into the assortment. Such goods include alcohol, chocolate, fish and meat delicacies, and high-quality cheeses. There are manufacturers in St. Petersburg who are able to produce such products, and retail chains have experience in opening and maintaining retail shelves with such an assortment that will be especially in demand on the eve of the holidays.

That is, it is necessary to develop a special promotional and pricing strategy that will combine the following elements: the opportunity for the mass buyer to purchase everyday goods (milk, bread, eggs, groceries) using promotions and discounts, and products of the "holiday" assortment or delicacies at affordable prices. prices and in sufficient range.

The experience of Perekrestok and VkusVill revealed another trend in the work of retail chains: the demand for dark stores and partner delivery. In this regard, the unification of dark stores, retailers' delivery departments and partner services will become relevant. Magnit is currently working on this trend by teaming up with the iGooods delivery service. IGooods has developed logistics centers in St. Petersburg, the range of which includes at least 10,000 SKUs. Darkstore itself forms the assortment matrix, but it can also include exclusive brands of retailers, including private labels. If IGooods and retail chains enter into partnership agreements, the range of the service will reach 22,000 items. As Magnit's experience shows, partnership with the service allows "to make delivery from a retail network even more convenient and attractive for users who prefer to make large purchases of products, but at the same time spend a little time on the whole process" (Sorokin, 2022).

This experience gives impetus to another trend - the development of e-commerce services, and it is under the brand of a retailer. This can be either your own delivery service or affiliate programs, for example, with Yandex.Food, Samokat. However, in the case of a private label or an original assortment, such as VkusVill, delivery with its own brand will help maintain the loyalty of customers who are used to the assortment of a particular retailer and choose it.

Particular attention should also be paid to the development of STM. In October 2022, according to Lenta, in St. Petersburg, the share of private labels in total sales was from 16% to 20%, although retailers expected a maximum of 15.4%. In this regard, the formation of special centers for the development and analysis of private labels for retail grocery chains is relevant.

As an experiment, Lenta launched the Product Lab marketing project in St. Petersburg hypermarkets, a special test center where experts from among regular customers will test and taste new private label chains. For participating in testing, experts receive bonuses on the Lenta loyalty card. Thus, two tasks are solved at once: customer loyalty is maintained, which encourages them to make purchases in the stores of the network, and actual testing of private labels that have not yet been put into circulation is carried out.

The peculiarity of the development of private labels lies in the fact that in different regions there are different consumer preferences. For example, manufacturers know that Petersburgers prefer creme brulee ice cream and instant coffee, but drink little non-alcoholic beer. Thus, the private label put on the shelf of a city retailer must take into account these consumer preferences and traditions.

As part of the development of private labels, it is important to adhere to the following trends:

- develop private labels not only in the lower price segment, but also in the middle and premium segments;

- to develop category management aimed at SMT and regional producers;

- timely test, update or replace private labels on the shelf, focusing on the fact that in the most popular segments the actual or potential share of private labels should be at least 16-20%.

Within the framework of the city program for the development of the concept of the "15-minute city", retail development trends are also being formed (Dom.RF, 2021). According to Romir, the structure of retail trade over the past 5 years has changed from a decrease in preference for traditional hypermarkets (from 34% to 29%) to an increase in preferences for "hard" discounters (from 1% to 4%), online shopping (from 3% to 6% ) and convenience stores (from 12% to 19%).

Based on this, a trend is gaining momentum in St. Petersburg, when traditional hypermarkets begin to open outlets that are not typical for them. For example, in 2021, O'KEY announced that it intends to develop the convenience store format, which is insufficient in St. Petersburg and has great potential. Analysts believe that a few smaller stores can generate more customer traffic. In the summer of 2021, the chain filed an application with Rospatent for the registration of the O’KEY Daily trademark, which will be intended for this type of outlets (Zaitseva, 2021).

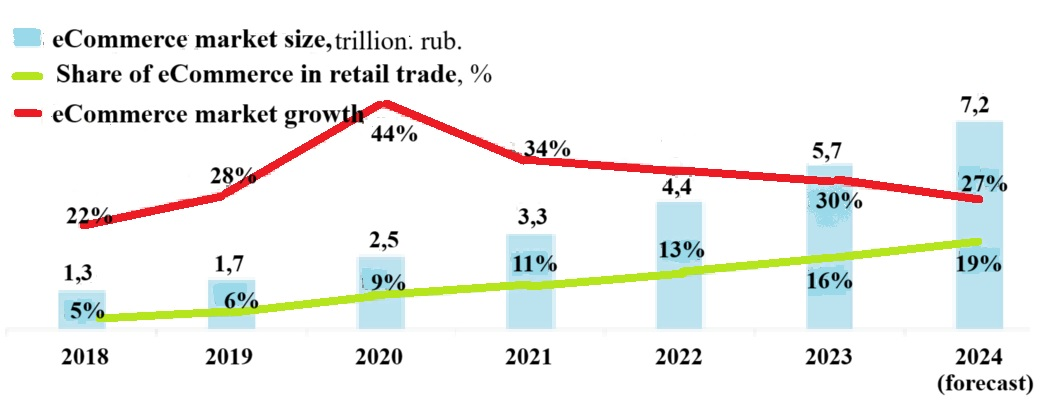
Experts emphasize that this format in St. Petersburg will be in great demand in places of new development in already inhabited areas. For example, in the Petrogradsky, Kalininsky, Moskovsky, Vyborgsky districts of St. Petersburg, where new housing is being introduced, and there are quite few territories for opening hypermarkets with all the infrastructure. At the same time, there are enough premises on the real estate market with an area of ​​less than 300 sq.m, which are just right for the convenience store format. If hypermarkets do not master the new format, they risk losing customers.

This format is already being actively developed by Azbuka Vkusa, which opens retail outlets called AB Daily in new buildings in the Petrogradsky District, but there are still few of them and clearly not enough. Also, as part of the 15-minute city concept, Lenta opens new retail outlets. The popularity of hypermarkets is falling, they occupy an area of at least 5,500 square meters and cannot be located in densely populated new buildings. Therefore, Lenta is launching the SuperLenta format on the first floors of residential buildings or in small detached premises.

At the same time, the retailer does not intend to develop net discounters, emphasizing that they are looking for “a model that could then be safely scaled up, being sure that it will be able to recoup the shareholders’ investments… We are rather trying to find an economy store option that would be suitable for our current client in the current economic situation and at the same time could enjoy most of the synergies that can be obtained by being part of the “big” Lenta (Retail.Ru., 2022).

Another trend that has become familiar and the relevance of which is not disputed, but it can undergo certain transformations. We are talking about the digitalization of the network business. Since the beginning of the pandemic, the growth of online commerce has shown at least 6% per year. The cumulative increase in network retail until 2024 is planned to be 4.4 trillion rubles, with a total income of 23.3 trillion rubles.

The total volume of e-commerce and the place of network retail in it is shown in Fig. 2.



**Figure 2***.* The growth of e-commerce and the share of online retail in the trend, %

Source: EDIWEB (2021)

The following current trends that St. Petersburg specialists are working on can be distinguished:

- the introduction of virtual reality (VR) in e-commerce can increase online commerce by 17%. These technologies contribute to the so-called "risk-free trading", when you can make a more informed purchase decision;

- automation of purchases and analysis of consumer demand, updated in mobile offers. Now this technology is implemented in VkusVilla applications and in the future it will be extended to the activities of other retailers;

- analysis of the authenticity of the marking "Honest Sign" using a smartphone. The technology is implemented by Perekrestok and is attractive to other large retailers;

- creation of own marketplaces. X5 Group followed this path, having created the “For the future” marketplace and setting a certain trend.

**4 Conclusions**

As the analysis showed, the trends in the development of retail in St. Petersburg are similar to the all-Russian trends (and international ones too). But in St. Petersburg, they have a higher potential for development, as the city has better financial and human resources than most other regions of the country.

Statistical analysis also showed that there was no reduction in the volume of food retail. Food is the last thing people will save on. The rise in food prices was held back by agreements between retailers, rather high competition among sellers, and the regulatory influence of the state. Due to sanctions and the withdrawal of some Western chains from the Russian market, the share of domestic retail chains naturally increased. At the same time, competition between retailers of different levels has intensified - from federal and regional chains to small and medium-sized businesses.

There was an active change in business models in food retail, taking into account the principles of ESG, the need for digital transformation and the use of artificial intelligence. The development of retail in the medium-long term in St. Petersburg will manifest such trends as: the further development of home delivery services, the development of the range of private labels not only among federal, but also regional players, including discounters, support at a high level of product quality at hard discounters, the growth of the green economy and marketing, the allocation of the green shelf in all federal networks, the digitalization of trade: the active development of online stores, joint marketplaces, digital service zones and mobile applications and e-commerce.

In order to improve the anti-crisis state policy in the sphere of regulation of regional retail, it is necessary to make scientifically based decisions, in connection with which the work reflected new approaches to the innovative development of retail and proposed a model of anti-crisis management of regional retail in the context of the consequences of the pandemic.

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