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**THE LABOUR MARKET
IN THE RESTAURANT
SECTOR: 2022**

**РИНОК ПРАЦІ
В РЕСТОРАННІЙ СФЕРІ:
2022**

Introduction. The emigration of more than 5.5 million citizens of working age and the internal displacement of more than 7.7 million Ukrainians after the start of the full-scale war with Russia caused changes in the HoReCa labor market.

Problem. The portrait of an employee in the HoReCa sector in Ukraine and abroad has changed significantly. Therefore, the study of the state of the labor market in the field of restaurant industry in wartime conditions is relevant.

The aim of the work is to carry out a comprehensive analysis of the Ukrainian labor market state in the field of restaurant business in war conditions, to determine the main trends and prospects for further development.

Methods. General scientific methods of analysis and synthesis, comparison, isolation, generalization and resulting systematization of the researched material are applied.

Results. As a result of the war there was a decrease in the market potential of the restaurant business. Consequently, the labor market changed its orientation from the employee to the employer.

Candidates are forced to give in to salary interests and adapt to new realities of work. The number of line workers is reduced as much as possible, resulting in an increase in the number of responsibilities of the rest of the staff. The Ukrainian restaurant business market suffers from a lack of qualified personnel, some of whom are mobilized, belong to IDPs or refugees.

Вступ. Еміграція після початку повномасштабної війни з росією (понад 5.5 млн громадян працездатного віку) та внутрішнє переміщення (понад 7.7 млн українців) спричинили зміни на ринку праці сфери *HoReCa*.

Проблема. Суттєво змінився портрет працівника у сфері *HoReCa* в Україні та за кордоном. Тому актуальними є дослідження стану ринку праці у сфері ресторанного господарства в умовах війни.

Мета роботи – проведення комплексного аналізу стану ринку праці України у сфері ресторанного бізнесу в умовах війни, визначення основних тенденцій і перспектив подальшого розвитку.

Методи. Застосовано загальнонаукові методи аналізу та синтезу, порівняння, виокремлення, узагальнення й результуючої систематизації дослідженого матеріалу.

Результати дослідження. Внаслідок війни відбулося зниження потенціалу ринку ресторанного бізнесу. Ринок праці змінив орієнтир з працівника на роботодавця.

Кандидати вимушені поступатися зарплатними інтересами й адаптуватися. Кількість лінійних працівників максимально скорочують, результатом чого є зростання кількості обов'язків у решти персоналу. Ринок українського ресторанного бізнесу страждає від нестачі кваліфікованого персоналу, частина якого є мобілізованою, належить до ВПО чи біженців.

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The labor market potential of the restaurant business abroad is analyzed. As a result, a portrait of a potential employee in the wartime restaurant business is described.

Conclusions. There will be a significant personnel update, we will have to reckon with changes in the portrait of a potential employee, and these circumstances will have a negative impact on business in general. While the Ukrainian restaurant market is undergoing structural changes, nothing will fundamentally change abroad.

Keywords: HoReCa; restaurant labor market; restaurant worker; employee portrait; volunteer; employment; unemployment; emigration.

JEL Classification: L83; O15; F22

Проаналізовано потенціал ринку праці ресторанного бізнесу за кордоном. Описано портрет потенційного працівника у ресторанному бізнесі воєнного часу.

Висновки. Відбудеться суттєве оновлення персоналу, доведеться рахуватися зі змінами портрету потенційного працівника, і ці обставини негативно вплинуть на бізнес загалом. Тоді як ресторанний ринок України зазнає структурних змін, за кордоном кардинально нічого не зміниться.

Ключові слова: HoReCa; ресторанний ринок праці; працівник ресторанної сфери; портрет працівника; волонтер; зайнятість; безробіття; еміграція.

Introduction. According to the UN, after the start of the full-scale war with Russia, as of June 16, 2022, more than 5.5 million citizens of working age left Ukraine [1; 2]. According to the report of the International Organization for Migration, since the beginning of the Russian invasion, more than 7.7 million Ukrainians have become internally displaced persons [3]. It is natural that, regardless of their status, most of them are looking for work.

The war also had a significant impact on business, in particular on the field of hospitality. In fact, since the Russian invasion of Ukraine, the restaurant business has stopped. Most of the owners immediately temporarily stopped the work of their establishments. However, many of them repurposed their activities into volunteer activities and began to feed the Armed Forces, military personnel, hospitals, displaced persons and local victims of shelling. As of August 1, 2022, 76 % of restaurants have resumed their work. At the same time, according to the data of the Ukrainian restaurant automation company Poster POS, 19 % of restaurants in Ukraine continued to work even in the first days of the war [4].

Problem. Considering the outflow from Ukraine to other countries of the world of people of working age with the desire to work, the portrait of an employee in the field of hospitality has changed significantly both in Ukraine and abroad. Based on the presented material, the study of the state of the labor market in the field of restaurant industry in wartime conditions, the determination of the main trends and prospects for its further development are relevant.

Analysis of recent research and publications. The issue of analyzing the state of the labor market in the field of restaurant industry, in particular in the conditions of war, determining the main realities, trends and trends of their development, was studied in the works of foreign and domestic specialized specialists and scientists, in particular H. Mahringer, E. Smeral та H. Mahringer, U. Huemer, G. Kirton, A. Greene, N. Lloyd, F. Gauret, M. Duszczuk, P. Kaczmarczyk, T. McEnchroe, I. Sichka, O. Nasonova, V. Syliveistrom, A. Magaletskiy and I. Mahaletska [5–15].

E. Smeral [5] studied the problems of the labor market in the hospitality industry (Labor Market Problems in the Hotel and Restaurant Business – the original title of the article is in brackets), in particular the level of vacancy in the industry in Europe, the actual level of unemployment, as well as the seasonality of jobs in the hospitality industry and schemes for attracting workers from abroad, including from Ukraine. The presented data was taken into account in view of the need to assess the dynamics of the market in a temporal juncture.

H. Mahringer [6] in his writings paid attention to the gender distribution of the labor market in Austria, as a European country, including in the field of restaurant business. The review article is interesting due to the presented assessment of the distribution of power according to gender. In particular, they note that the share of women in the field of restaurant service decreases with the increase in the reputation of the profession, as well as the amount of hourly wages. This study is noteworthy in view of the rare cases of such discrimination in the Ukrainian restaurant industry among kitchen workers and even more rarely among service personnel.

U. Huemer [7], G. Kirton and A. Greene [8] in their works quantitatively record the role of women and men in the labor market, reflect their incomes and employment prospects, pay attention to the age profile of workers in the industry, demonstrate the structure of training and further education for both sexes and the compatibility of family and work. However, their studies are aimed exclusively at the analysis of the indigenous population, and do not take into account aspects of the activities of wage earners and migrants. But taking into account the rapid filling of the European labor market by Ukrainians fleeing from the war, the conducted studies are now even less realistic and need to be updated.

F. Gauret and N. Lloyd [9] relay the main goal of Europe's Public Employment Services Network to integrate Ukrainian refugees into the system in order to reduce the pressure on the economies of European countries. They also identify that hospitality, healthcare and IT workers are in demand, where there is a shortage of skilled workers. But although half of the registered Ukrainian refugees have higher education, immediate access to employment in the fields of healthcare and IT is difficult. The labor market in the hospitality industry remains attractive and potentially large, which once again confirms the relevance of this study.

However, Poland plays the most important role among all European countries that receive refugees from Ukraine. In one of the sections of their study, M. Duszczyk and P. Kaczmarczyk [10] describe the pressure on the labor market of Poland exerted by the reception of refugees from Ukraine. They note the inconsistency of the candidates' existing skills with the needs of the labor market. It is predicted that this will require Poland to create a large number of proposals for training and retraining taking into account the professional profile of Ukrainians. After all, it used to be common for this country to employ Ukrainians mainly in low-paid and low-skilled labor

positions. Now the situation has radically changed quantitatively and qualitatively. Therefore, considering the number of refugees accepted by Poland, it will be relevant to take into account the results of this study to form an overall picture of changes in the European labor market, in particular in the field of hospitality.

At the same time, T. McEnchroe [11] notes that Ukrainian refugees are mainly interested in short-term work. The relevance of taking into account the results of the survey conducted by T. McEnchroe is due to a relatively low level of motivation for professional growth in the future, which can directly affect the quality of services provided in the field of hospitality.

I. Sichka [12] confirms that hospitality workers must go through several adaptation phases during employment to maintain the given service standards. However, he does not take into account the peculiarities of the portrait of the Ukrainian refugee worker, since this study was conducted a month before the Russian invasion of Ukraine. Therefore, it is important to consider what changes the employment policy may undergo in the current situation.

Domestic practitioners in the restaurant sector, in particular O. Nasonova [13], V. Sylveistrom [14], A. Magaletskiy and I. Mahaletska [15], on the other hand, predicted a significant update of the portrait of a typical worker in the restaurant industry in Ukraine through the prism of their own experience. However, they did not take into account the statistical data of the changes that took place, which partly confirm and partly refute some theses.

Accordingly, it is relevant to study both the domestic labor market in the field of restaurant business and the foreign one in the field of hospitality, given the rapid migration process due to the war in Ukraine.

The aim of the work is to carry out a comprehensive analysis of the state of the Ukrainian labor market in the field of the restaurant industry in wartime conditions, to determine the main trends and prospects for its further development.

Methods. Statistical data and information were used as a methodological basis for the preparation of the material of the article, including the databases of the State Statistics Service of Ukraine, the Ministry of Finance of Ukraine, the Ministry of Economy of Ukraine, the International Organization for Migration, the Institute of Mass Information, the Association of Cooks of Ukraine, the All-Ukrainian Association of Bakers, and analytical companies. "Gradus Research Company", "Opendatabot", "Poster", data from the services "GURT", "Ukrainian.city", "HoReCa Angels", "Work.UA", "Jobs.UA", "OLX", "Rabota.UA", "Jooble" and information from other open sources. General scientific methods of analysis and synthesis, comparison, isolation, generalization and resulting systematization of the researched material are applied.

Results. The labor market in the classical sense is the sphere of formation of labor supply and demand [16]. With the invasion of Russia on the territory of Ukraine in February 2022, the ratio of supply and demand for labor in the hospitality industry and the nature of the interdependence of these

variables changed radically. Since the beginning of the war, almost 5 million Ukrainians have lost their jobs. Thus, according to the International Labor Organization under the UN, more than 1.2 million are refugees, 3.6 million are unemployed, who have remained in Ukraine. Many qualified specialists are looking for work.

In particular, in the market of restaurant services, the offer of vacancies primarily depends on the actual number of operating establishments and their financial capacity (*Figure 1*).

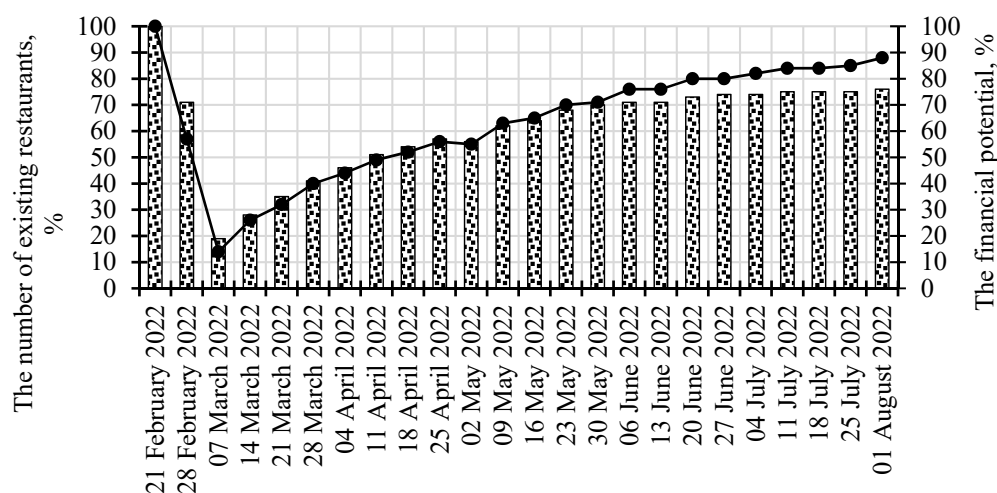


Figure 1. The dynamic of the potential of existing restaurants (%) before and during the war, 2022

Source: [17; 18].

The analysis of the information allows us to summarize that the maximum decrease in the potential of the restaurant business market to 19 % from the pre-war level occurred in the first weeks of March 2022. This is explained by the understanding that military actions will have a long-term nature; physical damage to the premises of institutions; loss of most of the workforce due to mobilization or departure to safe places; lack of recommendations on the organization of employee safety. Instead, the gradual and stable recovery of the restaurant industry is associated with the continuation of activity in the western regions of the country, in particular in Chernivtsi, Lviv, Ivano-Frankivsk [19], partial relocation of business to Western Ukraine [20] and the recovery/continuation of activity in cities that reliably protected by air defense installations [21]. According to the data in *Figure 1*, the adaptation period lasted a little more than a month and was marked by the resumption of work of 51 % of institutions.

Also, in April, the first news about the opening of new institutions appeared [22; 23]. Nevertheless, the formats of the new institutions in all aspects (production program, sophistication of the interior, etc.) were much simpler than the pre-war ones. Establishments that are now opening for the first time are mainly bistros, grill-bars, cafes, coffee shops and dark-kitchens. Overall, as of August 1, 2022, five months after the start of full-scale war,

the restaurant market is 75 % of its pre-war level. This testifies to the high potential of the market despite drastic structural changes. Accordingly, the pool of jobs in the restaurant business will grow, but to a lesser extent due to changes in the format of the establishments.

In order to confirm this, information (March 2022) [24] was analyzed regarding personnel changes experienced by the studied 721 establishments of the restaurant industry, and the regularities of the relevant processes were established (Figure 2).

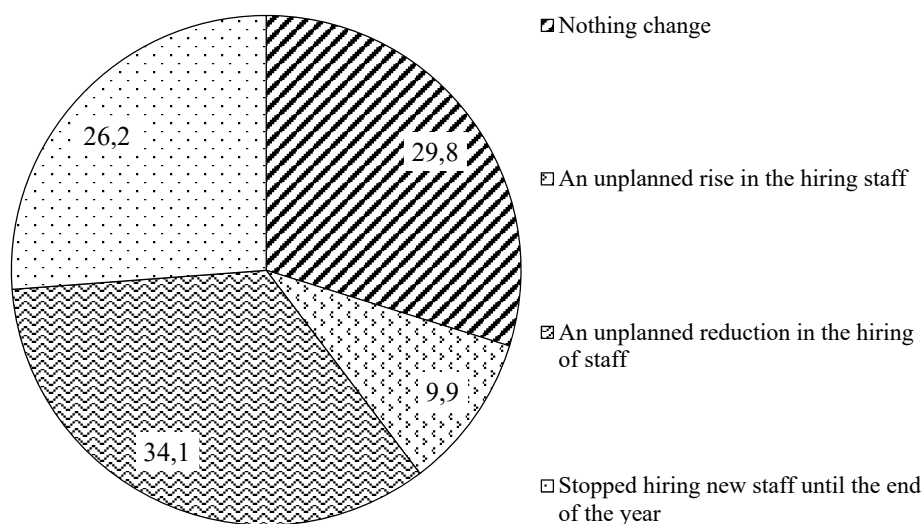


Figure 2. The dynamic of the restaurant plans for hiring employees (%) before and during the war

Source: [22–24].

Analysis of detailed data allow us to summarize that systemic changes began to take place in companies since the beginning of the war. Business began to adapt to the new realities of life and adapt to them. It is worth noting that since the pandemic of 2020, the restaurant business is in a constant state of turbulence. Even before the war, about 300–350 thousand people who worked in the restaurant industry left it due to instability. Even entire networks were closed due to the impossibility of paying rent and wages to employees [15]. The war caused restaurant-keepers to be re-examined for their ability to adapt to new changing conditions. Therefore, 30 % of the unplanned hiring of additional personnel is explained by the relocation of institutions to safe places and the increase in the workload of existing institutions, mainly in the West of Ukraine, at the expense of IDPs. In addition, 9.9 % of the surveyed restaurant-keepers do not change their plans for hiring staff. Also, 26.2 % do not plan to hire new employees until the end of the year. That is, the last two considered segments are characterized by an effort to preserve existing jobs. In contrast, 34 % of establishments that reported a change in hiring plans that would result in layoffs either suspended operations indefinitely or adapted to new business realities.

Therefore, according to the results of re-collected data (May – June 2022), it was found that more than 66 % of respondents reported a decrease in the number of personnel in the current reality (*Figure 3*) [25]. Therefore, more than 66 % of establishments responded appropriately to changes in the restaurant services market. First of all, by the will of the management, line workers were released, the duties of several positions were combined for the same salary; instead, due to indirect factors, personnel were released due to relocation to safer regions of the country, mobilization, loss of working capacity, death.

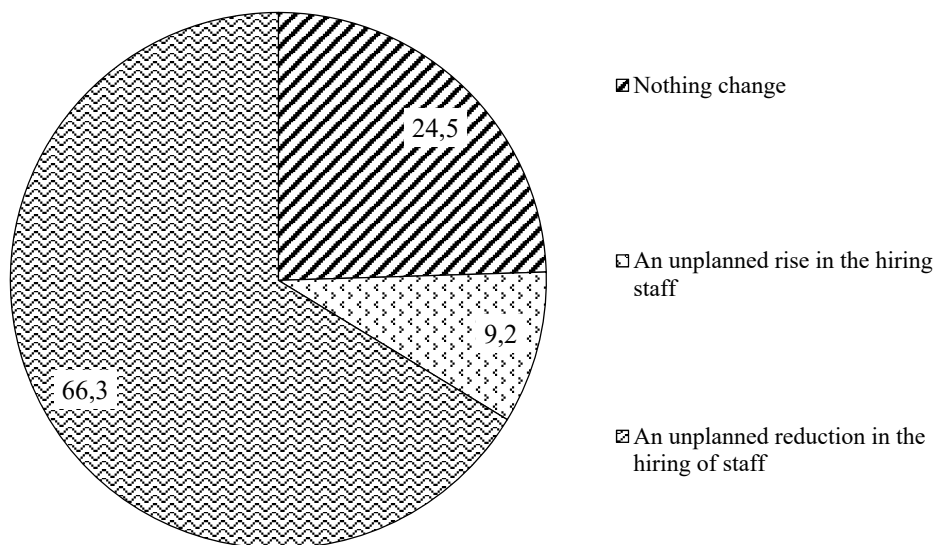


Figure 3. Changes in the number of the restaurant staff (%) before and during the war

Source: [25; 28; 29].

On the other hand, institutions that were not closed during the war, but needed workers on a free basis, actively recruited volunteers. The selection of volunteers was carried out without considering special education, work experience, or the results of a medical examination. The main reason for the absence of an entry barrier was the unpaid basis of employment and the lack of an alternative choice for employers. This is also reflected in the results presented in *Figure 3*. In particular, the meaning of the answers "no change" or "increase in the number of hired workers" is affected by the massive retraining of volunteers who replaced the dismissed workers and partially remained employed in new workplaces. These results are also explained by the fact that 25 % of institutions have not yet recovered their work from the pre-war level and, accordingly, the share of workers who were released creates a competitive environment in the labor market. Ukrainians faced a big problem: there is no work, and competition has increased. According to data from the Work.UA website, the candidates give way to salary interests: most are ready to reduce their salaries by 35–45 % from the pre-war level. In addition, a significant increase in the activity of job seekers is recorded,

starting from April 2022. For example, on grc.ua, the number of responses to open vacancies increased by 33 %, and the number of new registrations among candidates increased by 55 %.

Therefore, in five months of active hostilities, the market conditions have changed. The number of vacancies has become so small compared to pre-war levels that the recovery only suggests that the market has passed the zero mark, when everyone was engaged in security. As of March 2022, there were almost no new vacancies, and workers were not looking for work. Starting from April, the labor market entered the adaptation phase and continues to be in it. Searchers are just as active, there are just as few vacancies. The growth dynamics of the labor market in the restaurant industry remained consistently low. Analysts predicted that no drastic changes are expected during April-June. However, it was during this period that the market was characterized by stable growth. Kyiv, Lviv, Dnipro, Odesa and Vinnytsia are the leaders in the number of open vacancies as of June-August 2022, where about 67 % of all vacancies are concentrated. The number of vacancies is increasing most dynamically in the capital, where people are actively returning, business is recovering, and the level of security is relatively high due to the excellent operation of air defense installations. The labor market in Ukraine perked up noticeably in July. The number of vacancies increased by 14 %, and in the western regions their number reached 75 % of the 2021 figures [26; 27]. In July-August, there is an imbalance of demand and supply of work in favor of restaurant-keepers. It can be argued that the modern labor market in the restaurant business is an "employer's market" and not an employee's as it was during 2021. In order to stay on the market, companies had to significantly revise their expenses, including staff maintenance. Due to the drop-in company revenues, many of them laid off workers and cut salaries. According to data from the State Employment Service, approximately 12 people apply for one job. According to the grc.ua portal, this indicator is 17 in Zaporizhzhia Oblast, 14 in Odesa Oblast, 13 in Kyiv Oblast, and 9 in the capital. Given the combination of direct and indirect factors, this trend will continue at least until September (*Figure 4*).

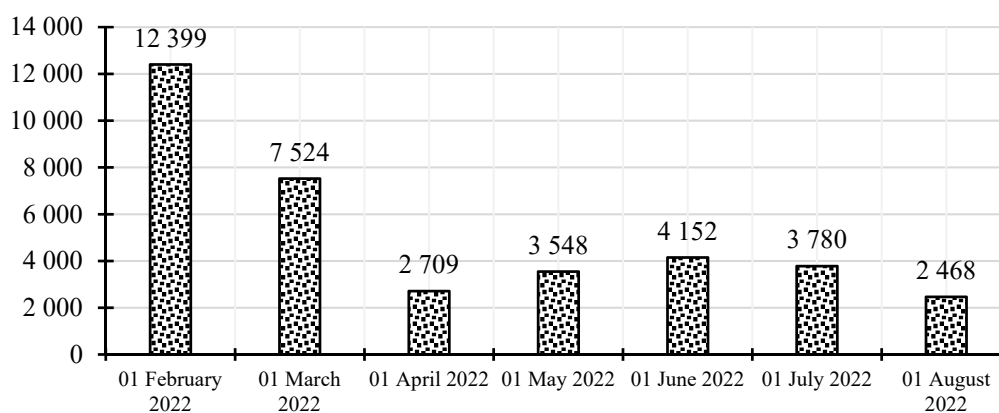


Figure 4. Changes in the number of open vacancies (pieces) before and during the war, 2022

Source: [26; 28; 29].

At the same time, the mass dismissals had common features. Mainly, the number of line workers was reduced, which as a result led to an increase in the number of responsibilities of the staff who were left. There is a consolidation of several job positions into one for a constant salary. "Waiter-cashier", "baker-cashier", "cook-waiter-cashier", "barista-waiter-cashier", etc. became common vacancies. The allocation of vacancies to open positions was carried out according to the determining affiliation to one or another sphere of responsibility (*Figure 5*).



Figure 5. Changes in the number of open vacancies due to profession (pieces; %)

Source: [26–31].

The distribution of forces has changed in favor of the kitchen staff, while the pre-war labor market was characterized by an excess of hired workers for service in the hall and an acute shortage of workers in production. On the other hand, the predominance of the number of administrative personnel over service personnel is conditional in view of the unification of their duties. Invariable during June-August is the demand for bar staff, which is explained by the increase in the share of bars, cafes, and coffee shops among active wartime establishments. The tendency to combine functional responsibilities, high competition among job seekers, and a decrease in the offered wages are predicted to be inherent in the labor market of restaurant services in Ukraine during the war and after its end.

On the other hand, analyzing the labor market of restaurant services and forming a "portrait of a restaurant worker", it is worth considering the aspects of employment of Ukrainian refugees in the restaurant sector abroad.

According to the Office of the United Nations High Commissioner for Refugees, 6.6 million citizens have gone abroad since the beginning of the war: 93 % of all Ukrainian refugees are women and only 7 % are men, including adults with children – 64 %. Mostly persons of working age, young people under 35 years of age, 64 % of whom speak one or more foreign

languages [32]. As the experience of other countries shows, some of these people do not return home. According to the data collected by the 4Service company, 67 % of Ukrainian refugees admit that they will stay abroad if the war drags on. Regardless of their plans for the future, refugees look for work abroad on their own, with the help of volunteer organizations or official job search platforms for foreigners.

Thus, since the beginning of the war, a social project – HoReCa Angels, based entirely on volunteer principles, was implemented to promote safe employment in the restaurant sector of Ukrainian refugees abroad [15]. The disadvantage of the project is the spot placement of vacant offers for employment in the restaurant business in different countries. Accordingly, this initiative did not have a particular impact on the labor market abroad.

Instead, official specialized services for employment abroad for foreigners were subject to study. Information about the work of the HOSCO – Hospitality Connection service was widely distributed among refugees. According to the website, as of August 2022, open vacancies in many HoReCa establishments were available for Ukrainians. The ratio of available open vacancies and companies that offer them by country is presented in *Figure 6* [33].

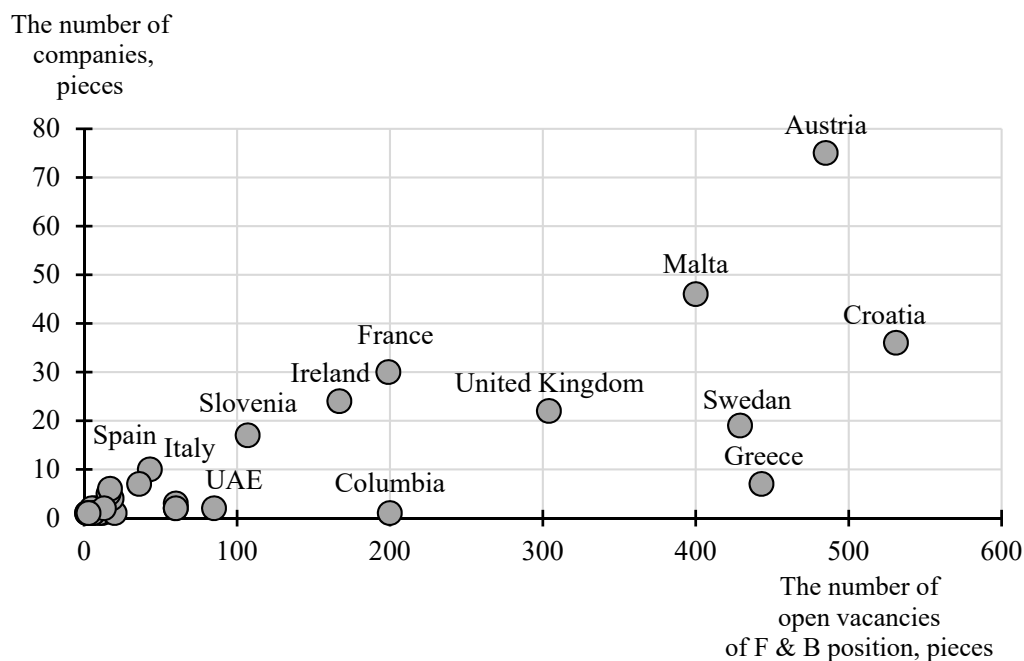


Figure 6. The average number of open vacancies of F&B positions (pieces) for Ukrainians by companies (pieces) by countries

Source: [15; 32; 33].

As can be seen, Austria (485 vacancies in 75 companies), Croatia (531 vacancies in 36 companies), Malta (400 vacancies in 46 companies) are the 6 leaders in terms of the number of open vacancies in the HoReCa sector and involved companies. This fact indicates a positive perception of Ukrainians as employees in the HoReCa sector. In addition, a large pool of vacancies from a large number of companies indicates the presence of healthy

competition and the struggle of the employer for the employee, and not the other way around. This circumstance generally contributes to the improvement of working conditions and the growth of wages in the industry. On the other hand, Colombia (200 vacancies in 1 network company), Greece (443 – in 7 companies), UAE (60 vacancies in 3 companies) and others are characterized by weak involvement of companies and are characterized as monopolistic offers. Accordingly, in the absence of an alternative, refugees may face a number of growing restrictions and violations of rights by the employer. Its distinctive that there is no connection between the number of accepted refugees and the available opportunities for employment in the HoReCa sector (*Figure 7*).

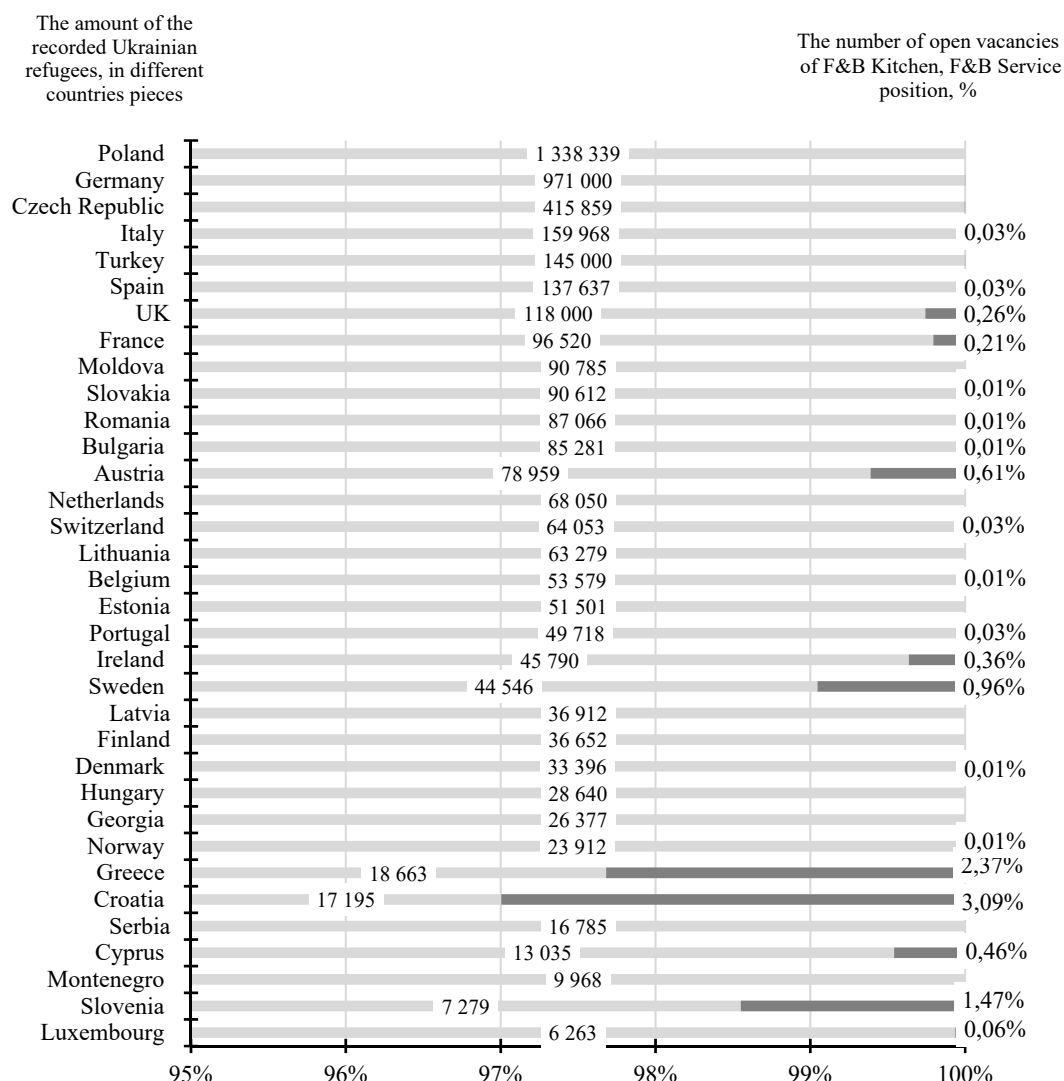


Figure 7. The interdependence of the number of open vacancies of F & B positions (%) and the number of refugees by countries (pieces, %)

Source: [15; 32; 33].

The maximum number of open vacancies in the HoReCa sector in relation to the number of accepted refugees is available in the labor market of Croatia, Greece and Slovenia. At the same time, the lack of job offers in

the restaurant business is characteristic of the market leaders in terms of the number of refugees accepted. This picture is explained by the usual assortment of available vacancies for foreigners. For example, according to the data of the National Bank of Poland (NBP), during 2017–2022, Ukrainians in Poland mainly perform simple work (construction, work in households (caring for children, the elderly and the sick, cleaning, housekeeping), agriculture, industry), which does not require high qualifications (71 %). Qualified Ukrainian workers on the Polish labor market are no more than 3 % of the total number. Refugees now, as well as workers before, are characterized by receiving a 32 % lower salary, a 35 % longer working week, and unsettled labor relations. The range of vacancies offered can change only with the support of the host country's government, through changes in the economy. Accordingly, at the moment, although Poland is the leader in the number of accepted refugees, there are few official vacancies for long-term work in the F&B sector for Ukrainians [34]. A similar situation is observed in other countries of the world that actively accepted refugees from Ukraine.

Structural changes in business in Ukraine, current requirements of the market abroad, contribute to changes in the "portrait of an employee" in the field of restaurant business, which, accordingly, in the future, restaurateurs should consider when recruiting staff.

The following traits are characteristic of an average employee in the restaurant industry:

Gender. With the beginning of hostilities, many women evacuated, and men took up arms. Therefore, according to LigaBiz, as of May 7, 2022, more than 60 % of workers have not been able to return to work since the beginning of the war [4]. In pre-war times, mostly men worked in the kitchen, and with the beginning of the war, the contingent of kitchen workers by gender changed sharply in the opposite direction [5].

Age. The average age of employees has also become younger, due to active youth aged 17–29 with a pro-Ukrainian position, who are willing to work for free on a volunteer basis. On the other hand, in the pre-war period, the average age of a chef was 30–35 years [6], his assistant cooks in the range of 21–37 years, support staff – 48–56 years, waiters – 17–20 years [7].

Qualifications and experience. It is worth noting that even before the war, the entry threshold for employees in the restaurant business was already low, and in fact there were no requirements for existing education, and express training took place during a short-term internship. At the same time, the current situation has significantly worsened. In the first month of the war, cooks worked for free, on enthusiasm. Since April, employees have already received their wages. Waiters, bartenders, hostesses temporarily lost their jobs. Instead, the workload of kitchen workers has increased many times, but the required level of qualification has fallen. This is explained by the fact that restaurant food became irrelevant during the war, instead, establishments changed the focus of production to simple dishes, a narrow assortment, with the lowest possible cost. Currently, the available positions of cook's assistants are occupied by persons without appropriate education, without sanitary

books, without work experience in the restaurant business and without orientation to prospective employment in current positions. At the same time, the availability of low-skilled personnel, problems with logistics, lack of funds collectively contributed to the simplification of the menu and, accordingly, technological processes, the narrowing of the range of manufactured products, the use of local raw materials. As a result, the successful implementation of such measures allows attracting low-skilled personnel and volunteers. However, the compliance of technological processes with HACCP standards is questionable in the absence of minimum required knowledge of sanitation and hygiene among employees. This and other factors will negatively affect the level of service and quality of products and services.

Localization. The owners of establishments began to give preference in employment to locals who live within walking distance of the establishment. There are several reasons for this. First of all, as a result of the pandemic, the restaurant business has already begun to reorient itself to the local consumer, in particular in the sleeping areas. And already during the full-scale invasion of Russia into Ukraine, this trend was characterized by the strengthening of this trend due to difficulties in moving around the city (change of routes, reduction of transport, air alarms) and shortage of fuel. This is evidenced by the decrease in demand for commercial real estate in the center of the capital, and the increase in demand on the outskirts of the city in sleeping areas [19]. Focusing on local workers eliminates the risk of absenteeism and lateness of workers due to problems with getting to the workplace. It will also help to increase the demand for products and services due to the promotion of the establishment through personal contacts of employees with local residents.

Language skills. Adoption of the draft law on services in the Ukrainian language was not implemented in practice before the start of a full-scale war. However, a massive change in the institution's policy regarding the presentation of menus and service only in the Ukrainian language contributed to the qualitative renewal of the staff.

Temporality. In view of the increase in the volume of duties in the absence or low growth of wages, employees will consider professions in the field of restaurant business as temporary employment, which does not contribute to increasing the level of service and the quality of products and services. Such a position will not contribute to self-improvement, work "for the future". It is predicted that staff turnover will increase significantly compared to the already high pre-war rate.

These characteristics should be considered when selecting and hiring staff for restaurant establishments. And in view of the above, it is worth following certain recommendations:

Stage of selection of employees. To ensure the hiring of employees with professional education, to organize training, training and retraining of personnel in order to maintain high standards of product and service quality. To give preference to local workers in view of the problems caused by the war. Employ former military personnel.

The stage of introduction into the work process. Simplify production processes in existing establishments or open establishments of a simpler

format in view of the low qualifications of existing candidates and the lack of motivation for professional growth.

The stage of rallying the workers. To support the patriotic spirit among the employees and guests of the institution (use appropriate symbols in the interior decoration, in the decoration of dishes and drinks, practice patriotic greetings, volunteer with the whole team, collect funds and send them to the help of the Armed Forces of Ukraine, report to the employees and guests of the institution with photos, videos, to help IDPs with social actions (cleaning the territory, construction) by personnel, etc.).

Work process. Be consistent in the institution's pro-state policy: replace software from Russian developers (for example, iiko, 1C: accounting, etc.) with Ukrainian alternatives (for example, Poster). Order products exclusively from Ukrainian manufacturers and suppliers. Give preference to suppliers who support the military and refugees during wartime. Provide service exclusively in the state language.

Summarizing the results of the research, it can be concluded that the restaurant labour market both abroad and in Ukraine has undergone large-scale changes. Corresponding changes need to be taken into account when hiring employees, developing and implementing an adaptation policy at hospitality enterprises, clarifying job duties, etc. The given recommendations may be supplemented. And the characteristics of the portrait of a typical restaurant business employee require monitoring of further changes in dynamics.

Conclusions. Therefore, analyzing the current situation, we can conclude that there will be a significant renewal and rejuvenation of the personnel, we will have to reckon with a gender bias in favor of women, the level of qualification of employees will continue to decrease, the relevance of obtaining education in the specific direction will fall below the current level. In the future, these circumstances will negatively affect the quality of products and services and business in general.

On the other hand, the share of volunteers who came to work in the kitchen will either stay there or try to open their own establishment, given the experience gained. This will contribute to the diversification of restaurant establishments, due to the opening of qualitatively new, non-standard establishments.

While the Ukrainian restaurant market is undergoing structural changes, nothing will fundamentally change abroad. Despite the large number of refugees of working age who are related to the restaurant industry, open vacancies in the relevant field abroad are not enough to make changes in the industry. It is predicted that the situation abroad will change over time due to the large number of unemployed refugees of working age with the experience in the HoReCa sector.

Conflict of interest. The authors certify that they have no financial or non-financial interest in the subject matter or materials discussed in this manuscript; the authors have no association with state bodies, any organizations or commercial entities having a financial interest in or financial conflict with the subject matter or research presented in the manuscript. Given that one of the authors is affiliated with the institution that publishes this journal, which may cause potential conflict or suspicion of bias and therefore the final decision to publish this article (including the reviewers and editors) is made by the members of the Editorial Board who are not the employees of this institution.

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