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THE IMPACT OF INNOVATIVE TRENDS ON THE COMPETITIVENESS OF ENTERPRISES IN THE HOSPITALITY INDUSTRY

This study examines the impact of the innovative trend of freezing bread and bakery products on the competitiveness of enterprises in the hospitality industry. The term «hospitality» is most commonly associated with the hotel and restaurant sectors. The structure of the hospitality industry has been analysed according to the Classification of Types of Economic Activities (CTEA DK 009:2010). A comparative analysis has been performed between the sales volumes and employment levels of enterprises in Ukraine's national economy and those in the hospitality sector. The paper has also explored current trends in the development of the bakery industry. According to the international forecast" Nutrition in the 21st Century", freezing has been recognized as one of the most advanced methods for processing and preserving food raw materials, positioning it as a key trend for enhancing competitiveness in hospitality enterprises. The findings emphasize the importance of adopting freezing technologies to optimize logistics, reduce losses, and improve customer satisfaction. The paper is concluded with recommendations for further research into innovative trends that can boost the competitiveness of the hospitality industry.

Key words: innovations, bread market trends, frozen bakery products, hospitality industry, competitiveness, on-the-go food, fast food restaurants.

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Statement of the problem and its connection with important scientific and practical tasks. Human advancement has always been driven by the exploration and implementation of innovative methods to simplify life and ensure adequate food resources. One of the critical milestones in human history was the shift from foraging to cultivating cereals. Early humans prepared porridge, which was later accidentally roasted over fire, and soon after, grains were ground into flour for baking flatbreads. References to bread production among the ancient Egyptians date back 4–5 millennia BC, where they pioneered the use of leavening and incorporated ingredients such as milk, honey, and fats. From these humble beginnings, the continuous improvement of bakery recipes, technologies, and product forms has persisted to the present day. At the 2020 Conference on Production and Packaging Technologies for Bakery and Flour Confectionery Products in Kyiv, industry leaders identified key trends in the bread market. These include the growth of bakery production in retail chains, expanding product assortments, rising influence of tax imbalances and unfair competition, and the growing emphasis on health-conscious eating. The development of artisanal breads, entry of international players into Ukraine, and expansion of bread street food also mark significant shifts. Against this backdrop, this paper explores how the adoption of freezing technologies for bakery products can enhance the competitiveness of enterprises within the hospitality sector.

The analysis of the latest publications on the problem. Research into the hospitality industry and its functional sectors has been conducted by both Ukrainian and international scholars. Among them are Andrenko I., Belyak A., Vyshnevska H., Honchar L., Huzar U., Shapovalenko D., Shestopalov B., and Shlapak A. Insights from leading industry practitioners, including Averchenko V. (PJSC Concern Khlibprom), Solovey S. (Puratos Ukraine), Tryndyuk Yu. (LLC Holding Company «Khlibni Investytsii»), and Chereda V. (PJSC Kyivkhlib), have also been instrumental. Taking into account

the results of the previous research and given the martial law conditions affecting hospitality enterprises, there is an urgent need to further investigate and implement innovative trends that can enhance competitiveness in the sector.

Forming of the aims of the research. The aim of this study is to analyze the impact of process innovations – specifically, freezing technologies for bread and bakery products – on the competitiveness of hospitality enterprises. To achieve this goal, the following tasks have been undertaken: the analysis of the concept and structure of the hospitality industry; investigation of the industry classification according to CTEA DK 009:2010; carrying out of the comparative analysis of sales volumes and employment between Ukraine's national economy and the hospitality sector; assessment of the impact of freezing technologies on the competitiveness of the hospitality industry.

Giving an account of the main results and their substantiation. The term «hospitality» was introduced by European experts from HOTREC (Confederation of National Associations of Hotels and Restaurants, founded in 1982). It encompasses systems and mechanisms aimed at meeting guests' domestic, business, and cultural needs [1]. The English word «hospitality» traces its roots to the Latin hospitium, related to host (host) and hospice (shelter) [2]. The hospitality industry is closely linked to tourism. Some scholars view it as a unifying instrument that encompasses tourism, hotel and restaurant businesses, public catering, leisure, and event organization [3]. Others believe that the hospitality industry is a part of tourism, which is responsible for accommodation, catering for tourists and activities related to entertainment [4]. The term «hospitality» is mainly used in the hotel and restaurant business, which is understood as a list of activities and the procedure for their implementation in order to meet the various needs, services and a number of services of guests of tourist companies. The hospitality industry, along with other sectors of the national economy, contributes to the filling of the state budget, the growth of the number of jobs, both in the centre and on the periphery, and acts as a motivator for the growth of other areas related to the hotel and restaurant business. Domestic researchers [5] include the following main components of the hospitality industry: hotel industry (hotel business); restaurant business; tourism business; transport enterprises; medical institutions; sports facilities; socio-cultural institutions (Table 1). Others regard it as a sector within tourism that focuses on accommodation, catering, and entertainment services.

Table 1

Components of the hospitality industry [5]

Component	Description
Hotel Business	Hotels, motels, campsites, etc.
Restaurant Business	Restaurant chains, cafes, fast food establishments, and other catering services
Transport Enterprises	Airports, railways, automobiles, etc.
Medical Institutions	Private and public medical facilities
Socio-cultural Institutions	Museums, exhibition centres, theatres, concert halls, libraries, etc.
Tourism Business	Travel companies and agencies
Sports Facilities	Sports complexes, swimming pools, gyms

For comparison, EduSteps which is the official representative of leading international hospitality management universities – hotel, restaurant management and event management – Glion Institute of Higher Education (Campuses in Switzerland, Great Britain) and Les Roches Global Hospitality Education (Campuses in Spain, Switzerland, China and the USA) outlines a more simplified structure consisting of five sectors: Lodging and Accommodation, Food and Beverage, Travel and Tourism, Entertainment Industry, Timeshare. The hospitality industry refers to the socio-economic systems of the tourism sector with its own development vectors, organizational and technological, legal forms of organization and institutional support. The hospitality industry includes hotel and restaurant companies that are rapidly developing, offering a variety of accommodation, catering, household services, recreation, entertainment and other services. The analysis of the research into the structure of the hospitality industry shows that one of the key components is the catering sector. To analyze the role of the catering system in the structure of the hospitality industry, the structure of KVED DK 009:2010 was studied, in which Section I was highlighted: Temporary accommodation and catering has been emphasized. This section covers two areas: provision of places for short-term accommodation and provision of ready-made meals and drinks on site.

Chapter 55. KVED-2010 establishes requirements for short-term accommodation services. Chapter 56. KVED-2010 regulates the work on providing meals and beverages. This chapter covers food and beverage service activities if food and beverages are consumed on site in classic restaurants, self-service or quick-service restaurants operating on a permanent or temporary basis, with or without seating. The KVED-2010 study showed that the catering system belongs to the hospitality industry and is designed to provide catering services to tourists, athletes, and other categories of food consumers in public catering establishments [7].

Using data from the Statistical Yearbook of Ukraine for 2022, the comparative analysis of the volume of products sold by enterprises of the national economy of Ukraine and enterprises for temporary accommodation and catering was carried out (Table 2).

Figure 1. Structure of the Hospitality Industry According to Edu Steps [6]

Table 2

Sales Volume of Enterprises in Ukraine's National Economy and the Hospitality Industry, million UAH

Year	National Economy	Hospitality Industry Enterprises	% of National Economy
2015	5 159 067,1	18 250, 0	0,35
2019	9 639 730,6	42 201,9	0,44
2020	10 049 870,8	30 215,0	0,30
2021	13 616 793.2	48 059,1	0,35
2022	11 033 018,1	35 617,4	0,32

**Source: calculated by the authors based on [8]*

Hospitality enterprises account for approximately 0.35% of Ukraine's total economic output. Employment Analysis of Average Employment in Ukraine's National Economy and the Hospitality Industry, thousand persons (Table 3).

Table 3

Comparative Analysis of Average Employment in Ukraine's National Economy and the Hospitality Industry, thousand persons*

Year	National Economy	Hospitality Industry	% of National Economy
2015	8065	71	0.88
2017	7679	70	0.91
2018	7662	70	0,91
2019	7443	76	1,02
2020	7345	68	0,93
2021	7096	65	0,92

**Source: calculated by the authors based on [8]*

The hospitality sector employs approximately 0.93% of the workforce in Ukraine's national economy. Comparative calculations of the labour efficiency of national housekeepers (excluding hospitality industry workers) by product sales indicator and the labour efficiency of hospitality industry workers by the same indicator (Table 4).

Table 4

Comparison of labour efficiency, thousand UAH*

Indicator	2015	2019	2020	2021
Sales volumes in the national economy (excluding the hospitality industry). thousand UAH	5140817100	9597528700	10019655,8	13568734,1
Average number of employees in the national economy excluding employees in the hospitality industry, thousand people	7994	7367	7277	7031

Continue of table 4

Indicator	2015	2019	2020	2021
Labour efficiency of 1 worker by the indicator of sales volume in the national economy, thousand UAH	643,1	1302,8	1376,9	1929,8
Sales volumes of hospitality industry products, thousand UAH	18250000	42201900	30215000	48059100
Number of employees in the hospitality industry, thousand UAH.	71	76	68	65
Labour efficiency of 1 employee in the hospitality industry by sales volume indicator, thousand UAH	257,0	555,3	444,3	739,4
Coefficients of differences in labour efficiency of 1 employee in the national economy and the hospitality industry (times)	2,5	2,35	3,1	2,6

**Source: Calculated by the authors based on [8]*

The calculations which have been made allow us to state: in the structure of the classifier of types of economic activity KVED DK 009:2010, Section I has been distinguished: temporary accommodation and catering activities; during 2015-2021, an increase in the volume of sales of products by enterprises of the national economy of Ukraine and enterprises of the hospitality industry has been observed; the share of the volume of products sold by enterprises of the hospitality industry in the total volume of sales by enterprises of the national economy of Ukraine is 0.35 percent; the share of the number of employees working at enterprises of the hospitality industry in the total number of the national economy of the state occupies an average of 0.93 percent; comparative calculations of the labour efficiency of employees of the national economy (excluding employees of the hospitality industry) and the labour efficiency of employees of the hospitality industry demonstrate that the labour efficiency in the hospitality industry show us the following results:

a. the indices of the labour efficiency of 1 employee in the field of the national economy and respectively in the hospitality industry demonstrate the increasing tendency.
b. The labour efficiency of 1 employee in the hospitality industry is lower than that of 1 employee in tge national economy on an average by 2.64 times ((2.5+2.35+3.1+2.6)\4).

The problem is rooted in the organization of work in the hospitality industry, where a lot of manual labor is used for a certain amount of processes and operations. The increase in sales of products (services) during the period under review is due to several factors. One of them is the growth in sales of frozen bakery products in the hotel catering system. The current global trend is people saving their main resource – time: in the work process, on vacation, traveling, in everyday life. One of the common vectors of saving is consuming food “on the go”. Despite the Ukrainian traditions of home cooking, saving time leads them to – cafes, bars, pubs, bistros. For this reason, the influence of street trade on the bread market is growing and stimulating the demand for small, ready-to-eat long-term storage products, which are supplied frozen and heated up on the street trading floor. The main competitive advantages, of course, are in quality, wide assortment and speed of bringing the product to readiness. One of the manifestations of this trend is already the increase in the production of toast bread, which is the basis for sandwiches, over the past two years. Time is becoming more precious, people live dynamically, snacking on the go. This must be taken into account and adapted to the realities.

In its international forecast "Nutrition in the 21st Century," UNESCO recognizes that freezing food is one of the most effective ways to process and preserve food raw materials.

The spread of low-temperature technologies in the baking and confectionery industries is due to these advantages: baking products from frozen semi-finished products allows you to save time, space and special equipment for manufacturing; semi-finished products are convenient to use for home baking; prerequisites have been created for a quick response to market demands; the possibility of centralized quality and safety control at the stage of manufacturing frozen semi-finished products has been ensured; the possibility of expanding the sales network of fresh products by installing inexpensive low-power ovens for baking directly at the points of sale has also been provided.

Freezing technology is widely used in different parts of the world. An example is the statistics of the USA, where 69% of frozen dough blanks are supplied to bakeries, and the rest to catering establishments. In Europe, frozen dough semi-finished products occupy 80-90% of the entire bread market, while frozen bakery products are sold in any supermarket. Global trends indicate an increase in demand for frozen products that can be cooked in a microwave oven. In addition, freshly baked bread made on the site from frozen processed products,is in great demand in fast food segments and HoReCa segments, which are the main consumers in the market. In practice, the following freezing technologies are used: freshly mixed dough; after dividing the dough into pieces; melded dough blanks; partially baked dough blanks; finished products after baking and cooling. At all stages of the technical process, freezing is carried out in a shock freezing chamber at a temperature of minus 20-25°C or minus 30-35°C, to the temperature of the central part of the product of minus 18°C. The product is stored in a freezer at a temperature of minus 18°C. Under such conditions, the shelf life is up to 6 months.

In the spread of promising technology, the main drawback is the high price of the equipment. Almost the entire technological process is built using special refrigeration units: quick freezing of products, storage in refrigerated warehouses, transportation in special refrigerated trucks, storage in refrigerators at the point of sale. At all stages of the production and logistics chain, an appropriate low temperature must be ensured. Provided that the entire production, logistics and warehouse chain is properly organized, frozen products can be stored for up to 180 days without losing their taste and nutritional properties. The market for frozen HFCS in Ukraine, as in most countries of the world, is actively developing. Consumer diets have changed dramatically during the COVID-19 pandemic, and prolonged stay at home has made self-cooking a necessary habit and required new solutions for quick, convenient and tasty preparation of dishes. Frozen semi-finished products have become one of the types of products whose market is growing during this period. The volume and assortment of frozen CBV are increasing in Ukrainian retail chains (Table 5).

Table 5

Range of Frozen Bakery Products Available in Ukrainian Retail Chains [9]

Product Name	Weight (g)	Packaging	Price (UAH/unit)
Vienna Hot Dog Rolls	65	5 pcs × 65 g	61.45
Frozen Rollini with Veal	95	—	27.98
Frozen Apple Strudel	350	—	154.33

The analysis of the frozen pastry market shows the recovery of the industry after a significant decline due to the outbreak of full-scale war. Ukrainian producers of frozen products are increasing production and export volumes. The sales market is significantly dependent on the overall consumption of bakery products, but requires special storage and preparation conditions. Given the level of population migration and the number of potential consumers, it is possible to predict significant market growth only after the end of the war and the return of the population to Ukraine. Currently, 5.2 million Ukrainians are abroad [10]. Two factors contribute to the development of this segment: consumer demand for fresh bread and other baked goods and economic benefits for manufacturers and retailers. The examples given prove that the frozen food segment is one of the promising ones in the food sector: in the short term, this market will show growth by almost a third, so that its share will approach 10 % of the total volume of food consumption. For example, according to analysts' forecasts, in 2024 the volume of the global frozen food market should amount to 223 billion dollars, and by 2026 – 295 billion. Traditionally, the Ukrainian market lags behind its eastern neighbours in development. At the same time, it is worth recognizing that the time to overcome these gaps is rapidly decreasing both due to the development of technologies and due to an increase in the speed of general processes. An example is the dynamics of the French company Mekaterm, which supplies 1-2 technological lines to Ukraine per year, while Poland builds one full-fledged bakery per month [12].

Conclusions and prospects of the further investigations. The study of the impact of the innovative trend of freezing bakery products on the competitiveness of hospitality establishments allows us to draw some conclusions. It has been proven that the hospitality industry is a dynamically developing industry, one of the key components of the service sector. According to the estimates, in 2015-2021 there will be an increase in the volume of sales of products by enterprises of the Ukrainian economy in general and enterprises of the hospitality industry in particular. The share of the volume of products sold by hospitality enterprises in the total volume of sales by enterprises of the national economy of Ukraine is 0.35 percent. The share of the number of employees working in hospitality enterprises in the total number of employees of the national economy of the state is on average 0.93 percent. The labour efficiency of 1 employee working in the hospitality industry is lower than the labour efficiency of 1 employee working in the national economy by an average of 2.64 times. The reason for this lies in the system of labour organization of the hospitality industry, where a significant amount of manual labour is used. The innovative trend of freezing bakery products, which is widely used in the food system, significantly affects the growth of the competitiveness of the hospitality industry. Further study of the results of the hospitality industry requires the analysis of the activities of the functional areas of the industry: tourism, hotel business, catering, recreation and entertainment, organization of conferences and meetings, and their economic contribution to the overall results. The availability of information on the results of the activities of each functional area will allow to develop the models of industry development according to the certain criteria.

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ВПЛИВ ІННОВАЦІЙНИХ ТРЕНДІВ НА КОНКУРЕНТОСПРОМОЖНІСТЬ ПІДПРИЄМСТВ ГАЛУЗІ ГОСТИННОСТІ

Стаття присвячена дослідженню впливу інноваційних технологій на конкурентоспроможність підприємств галузі гостинності. Поняття "гостинність" найчастіше використовується у готельно-ресторанному бізнесі. Гостинність розуміється як система заходів і порядок їх реалізації з метою задоволення різноманітних побутових, господарських та культурних потреб гостей туристичних компаній, їхнього сервісного обслуговування та надання комплексу послуг. Галузь гостинності сприяє ефективності та розвитку національної економіки, оскільки зростання малого бізнесу наповнює державний бюджет, зростає зайнятість населення, покращується рівень життя в регіонах, а також позитивно впливають суміжні галузі, пов'язані з готельним бізнесом. Загалом індустрія гостинності є динамічно зростаючим сектором та однією з основних складових сфери послуг, яка включає готельні та ресторанні підприємства, що надають різноманітні послуги з розміщення, харчування, побутового обслуговування, відпочинку та розваг. Метою статті є дослідити структуру індустрії гостинності в Україні та проаналізувати вплив інноваційного тренду — заморожування хліба та хлібобулочних виробів — на конкурентоспроможність підприємств цієї галузі. Дослідження доводять, що відповідно до класифікації КВЕД-2010, система харчування є складовою індустрії гостинності у вигляді звичайних ресторанів, ресторанів самообслуговування, закладів швидкого обслуговування, кафе тощо. Згідно з міжнародним прогнозом ЮНЕСКО «Харчування у XXI столітті», заморожування харчових продуктів визнано одним із найбільш прогресивних методів їх обробки та зберігання. Випікання продукції із заморожених напівфабрикатів дозволяє заощаджувати час, простір і спеціальне обладнання для приготування; напівфабрикати зручні для домашньої випічки; створюються умови для оперативної реакції на потреби ринку; забезпечується централізований контроль якості та безпеки на етапі виготовлення заморожених напі-

вфабрикатів; з'являється можливість розширення мережі продажу свіжої продукції шляхом встановлення доступних малопотужних печей для випікання безпосередньо у точках продаж.

Ключові слова: інновації, тренди ринку хліба, заморожування ХБВ, галузь гостинності, конкурентоспроможність, їжа «на ходу», ресторани швидкого харчування.

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