

Dairy Products and Alternatives in Uzbekistan

September 2023

Table of Contents

Dairy Products and Alternatives in Uzbekistan

EXECUTIVE SUMMARY

Dairy products and alternatives in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for dairy products and alternatives?

MARKET DATA

Table 1 - Sales of Dairy Products and Alternatives by Category: Value 2018-2023

Table 2 - Sales of Dairy Products and Alternatives by Category: % Value Growth 2018-2023

Table 3 - NBO Company Shares of Dairy Products and Alternatives: % Value 2019-2023

Table 4 - LBN Brand Shares of Dairy Products and Alternatives: % Value 2020-2023

Table 5 - Distribution of Dairy Products and Alternatives by Format: % Value 2018-2023

Table 6 - Forecast Sales of Dairy Products and Alternatives by Category: Value 2023-2028

Table 7 - Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby Food in Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Increasing birth rate supports volume sales

Leader Nestlé gains further value share

Dried baby food registers highest current value growth

PROSPECTS AND OPPORTUNITIES

Moderate growth, supported by high birth rate

Prepared baby food sees highest growth

Growing consumer health conscious leads to increasing popularity of organic baby food

CATEGORY DATA

Table 8 - Sales of Baby Food by Category: Volume 2018-2023

Table 9 - Sales of Baby Food by Category: Value 2018-2023

Table 10 - Sales of Baby Food by Category: % Volume Growth 2018-2023

Table 11 - Sales of Baby Food by Category: % Value Growth 2018-2023

Table 12 - NBO Company Shares of Baby Food: % Value 2019-2023

Table 13 - LBN Brand Shares of Baby Food: % Value 2020-2023

Table 14 - Distribution of Baby Food by Format: % Value 2018-2023

Table 15 - Forecast Sales of Baby Food by Category: Volume 2023-2028

Table 16 - Forecast Sales of Baby Food by Category: Value 2023-2028

Table 17 - Forecast Sales of Baby Food by Category: % Volume Growth 2023-2028

Table 18 - Forecast Sales of Baby Food by Category: % Value Growth 2023-2028

Butter and Spreads in Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Muted performance for butter
Margarine and spreads account for bulk of volume sales
Lactalis maintains top spot

PROSPECTS AND OPPORTUNITIES

Population growth boosts volume sales
Local players to remain strong in margarine and spreads, while Lactalis looks to expand its presence in butter
In a mature product area, health and wellness key differentiators

CATEGORY DATA

Table 19 - Sales of Butter and Spreads by Category: Volume 2018-2023
Table 20 - Sales of Butter and Spreads by Category: Value 2018-2023
Table 21 - Sales of Butter and Spreads by Category: % Volume Growth 2018-2023
Table 22 - Sales of Butter and Spreads by Category: % Value Growth 2018-2023
Table 23 - NBO Company Shares of Butter and Spreads: % Value 2019-2023
Table 24 - LBN Brand Shares of Butter and Spreads: % Value 2020-2023
Table 25 - Distribution of Butter and Spreads by Format: % Value 2018-2023
Table 26 - Forecast Sales of Butter and Spreads by Category: Volume 2023-2028
Table 27 - Forecast Sales of Butter and Spreads by Category: Value 2023-2028
Table 28 - Forecast Sales of Butter and Spreads by Category: % Volume Growth 2023-2028
Table 29 - Forecast Sales of Butter and Spreads by Category: % Value Growth 2023-2028

Cheese in Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fall in volume sales for hard cheese
Soft and spreadable cheese registers moderate volume growth
Reconfigured brand Viola maintains value share

PROSPECTS AND OPPORTUNITIES

Moderate volume growth over forecast period
Limited growth for hard cheese, which will remain unaffordable to most consumers
Potential for added-value benefits

CATEGORY DATA

Table 30 - Sales of Cheese by Category: Volume 2018-2023
Table 31 - Sales of Cheese by Category: Value 2018-2023
Table 32 - Sales of Cheese by Category: % Volume Growth 2018-2023
Table 33 - Sales of Cheese by Category: % Value Growth 2018-2023
Table 34 - Sales of Spreadable Processed Cheese by Type: % Value 2018-2023
Table 35 - NBO Company Shares of Cheese: % Value 2019-2023
Table 36 - LBN Brand Shares of Cheese: % Value 2020-2023
Table 37 - Distribution of Cheese by Format: % Value 2018-2023
Table 38 - Forecast Sales of Cheese by Category: Volume 2023-2028
Table 39 - Forecast Sales of Cheese by Category: Value 2023-2028
Table 40 - Forecast Sales of Cheese by Category: % Volume Growth 2023-2028
Table 41 - Forecast Sales of Cheese by Category: % Value Growth 2023-2028

Drinking Milk Products in Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Shelf stable accounts for most volume sales
Focus on products with higher profit margins
Varied landscape in drinking milk in Uzbekistan

PROSPECTS AND OPPORTUNITIES

Moderate outlook over forecast period
Government support should boost sector over long term
Lactalis continues to lead in shelf stable

CATEGORY DATA

Table 42 - Sales of Drinking Milk Products by Category: Volume 2018-2023
Table 43 - Sales of Drinking Milk Products by Category: Value 2018-2023
Table 44 - Sales of Drinking Milk Products by Category: % Volume Growth 2018-2023
Table 45 - Sales of Drinking Milk Products by Category: % Value Growth 2018-2023
Table 46 - NBO Company Shares of Drinking Milk Products: % Value 2019-2023
Table 47 - LBN Brand Shares of Drinking Milk Products: % Value 2020-2023
Table 48 - Distribution of Drinking Milk Products by Format: % Value 2018-2023
Table 49 - Forecast Sales of Drinking Milk Products Products by Category: Volume 2023-2028
Table 50 - Forecast Sales of Drinking Milk Products Products by Category: Value 2023-2028
Table 51 - Forecast Sales of Drinking Milk Products Products by Category: % Volume Growth 2023-2028
Table 52 - Forecast Sales of Drinking Milk Products Products by Category: % Value Growth 2023-2028

Yoghurt and Sour Milk Products in Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sour milk products best performing dairy product in 2023
Local players dominate sour milk products
Yoghurt landscape remains fragmented

PROSPECTS AND OPPORTUNITIES

Bright outlook over forecast period
Local producers gain further foothold in yoghurt
Consumers remain traditional in their choices

CATEGORY DATA

Table 53 - Sales of Yoghurt and Sour Milk Products by Category: Volume 2018-2023
Table 54 - Sales of Yoghurt and Sour Milk Products by Category: Value 2018-2023
Table 55 - Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2018-2023
Table 56 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2018-2023
Table 57 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2019-2023
Table 58 - LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2020-2023
Table 59 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2018-2023
Table 60 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2023-2028
Table 61 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2023-2028
Table 62 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2023-2028
Table 63 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2023-2028

Other Dairy in Uzbekistan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fromage frais continues to account for most volume sales

Bio-Sut continues to lead

Continuing supply disruptions in condensed milk

PROSPECTS AND OPPORTUNITIES

Healthy outlook over forecast period

Intensified competition expected between global and local brands

Continuing supply disruptions for Russian brands

CATEGORY DATA

Table 64 - Sales of Other Dairy by Category: Volume 2018-2023

Table 65 - Sales of Other Dairy by Category: Value 2018-2023

Table 66 - Sales of Other Dairy by Category: % Volume Growth 2018-2023

Table 67 - Sales of Other Dairy by Category: % Value Growth 2018-2023

Table 68 - NBO Company Shares of Other Dairy: % Value 2019-2023

Table 69 - LBN Brand Shares of Other Dairy: % Value 2020-2023

Table 70 - Distribution of Other Dairy by Format: % Value 2018-2023

Table 71 - Forecast Sales of Other Dairy by Category: Volume 2023-2028

Table 72 - Forecast Sales of Other Dairy by Category: Value 2023-2028

Table 73 - Forecast Sales of Other Dairy by Category: % Volume Growth 2023-2028

Table 74 - Forecast Sales of Other Dairy by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/dairy-products-and-alternatives-in-uzbekistan/report.