

Cooking Ingredients and Meals in Ukraine

November 2023

Table of Contents

EXECUTIVE SUMMARY

Cooking ingredients and meals in 2023: The big picture

Key trends in 2023

Competitive landscape

Channel developments

What next for cooking ingredients and meals?

MARKET DATA

Table 1 - Sales of Cooking Ingredients and Meals by Category: Volume 2018-2023

Table 2 - Sales of Cooking Ingredients and Meals by Category: Value 2018-2023

Table 3 - Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2018-2023

Table 4 - Sales of Cooking Ingredients and Meals by Category: % Value Growth 2018-2023

Table 5 - NBO Company Shares of Cooking Ingredients and Meals: % Value 2019-2023

Table 6 - LBN Brand Shares of Cooking Ingredients and Meals: % Value 2020-2023

Table 7 - Penetration of Private Label by Category: % Value 2018-2023

Table 8 - Distribution of Cooking Ingredients and Meals by Format: % Value 2018-2023

Table 9 - Forecast Sales of Cooking Ingredients and Meals by Category: Volume 2023-2028

Table 10 - Forecast Sales of Cooking Ingredients and Meals by Category: Value 2023-2028

Table 11 - Forecast Sales of Cooking Ingredients and Meals by Category: % Volume Growth 2023-2028

Table 12 - Forecast Sales of Cooking Ingredients and Meals by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Edible Oils in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Positive volume growth for sunflower oil in 2023 after a very poor performance in 2022

Sunflower oil remains dominant as other types of edible oils struggle to find favour

Olive oil struggles to attract the attention of Ukraine's beleaguered consumers

PROSPECTS AND OPPORTUNITIES

Olive set to become more affordable due to private imports by leading chained retailers

Other edible oils now has strong opportunities to gain ground in Ukraine

Eventual resumption of sunflower oil exports to put upwards pressure on unit prices

CATEGORY DATA

Table 13 - Sales of Edible Oils by Category: Volume 2018-2023

Table 14 - Sales of Edible Oils by Category: Value 2018-2023

Table 15 - Sales of Edible Oils by Category: % Volume Growth 2018-2023

Table 16 - Sales of Edible Oils by Category: % Value Growth 2018-2023

Table 17 - NBO Company Shares of Edible Oils: % Value 2019-2023

Table 18 - LBN Brand Shares of Edible Oils: % Value 2020-2023

Table 19 - Distribution of Edible Oils by Format: % Value 2018-2023

Table 20 - Forecast Sales of Edible Oils by Category: Volume 2023-2028

Table 21 - Forecast Sales of Edible Oils by Category: Value 2023-2028

Table 22 - Forecast Sales of Edible Oils by Category: % Volume Growth 2023-2028

Table 23 - Forecast Sales of Edible Oils by Category: % Value Growth 2023-2028

Meals and Soups in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Demand for meals and soups rebounds as consumers stock up on food for emergencies

Major changes in the competitive landscape in dried ready meals and dry soup

Convenience and long shelf life remain major demand factors

PROSPECTS AND OPPORTUNITIES

Need for convenience among the local population set to underpin rising demand

Innovation set to cater to the increasingly diverse tastes of local consumers

Anticipated recovery of demand motivates numerous new players to enter the category

CATEGORY DATA

Table 24 - Sales of Meals and Soups by Category: Volume 2018-2023

Table 25 - Sales of Meals and Soups by Category: Value 2018-2023

Table 26 - Sales of Meals and Soups by Category: % Volume Growth 2018-2023

Table 27 - Sales of Meals and Soups by Category: % Value Growth 2018-2023

Table 28 - Sales of Chilled Ready Meals by Ethnicity: % Value 2018-2023

Table 29 - Sales of Frozen Ready Meals by Ethnicity: % Value 2018-2023

Table 30 - Sales of Soup by Leading Flavours: Rankings 2018-2023

Table 31 - NBO Company Shares of Meals and Soups: % Value 2019-2023

Table 32 - LBN Brand Shares of Meals and Soups: % Value 2020-2023

Table 33 - Distribution of Meals and Soups by Format: % Value 2018-2023

Table 34 - Forecast Sales of Meals and Soups by Category: Volume 2023-2028

Table 35 - Forecast Sales of Meals and Soups by Category: Value 2023-2028

Table 36 - Forecast Sales of Meals and Soups by Category: % Volume Growth 2023-2028

Table 37 - Forecast Sales of Meals and Soups by Category: % Value Growth 2023-2028

Sauces, Dips and Condiments in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Complex matrix of trends applies across a diverse category of very different products

Major local name Chumak has lost significant ground since the onset of armed conflict

Some local players benefit from the challenges faced by their competitors

PROSPECTS AND OPPORTUNITIES

Innovation set to emerge as consumers become more sophisticated

Saturation of demand in ketchup and mayonnaise set to suppress sales growth

Absence of celebrations, social gatherings and leisure tourism set to undermine growth

CATEGORY DATA

Table 38 - Sales of Sauces, Dips and Condiments by Category: Volume 2018-2023

Table 39 - Sales of Sauces, Dips and Condiments by Category: Value 2018-2023

Table 40 - Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2018-2023

Table 41 - Sales of Sauces, Dips and Condiments by Category: % Value Growth 2018-2023

Table 42 - Sales of Liquid Recipe Sauces by Type: % Value 2018-2023

Table 43 - Sales of Other Sauces and Condiments by Type: Rankings 2018-2023

Table 44 - NBO Company Shares of Sauces, Dips and Condiments: % Value 2019-2023

Table 45 - LBN Brand Shares of Sauces, Dips and Condiments: % Value 2020-2023

Table 46 - Distribution of Sauces, Dips and Condiments by Format: % Value 2018-2023

Table 47 - Forecast Sales of Sauces, Dips and Condiments by Category: Volume 2023-2028

Table 48 - Forecast Sales of Sauces, Dips and Condiments by Category: Value 2023-2028

Table 49 - Forecast Sales of Sauces, Dips and Condiments by Category: % Volume Growth 2023-2028

Table 50 - Forecast Sales of Sauces, Dips and Condiments by Category: % Value Growth 2023-2028

Sweet Spreads in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

High inflation and price rises motivate consumers to source honey via informal channels

Fewer children means lower demand for chocolate spreads and nut and seed based spreads

Nutritional information printed on packaging helps consumers to make healthy choices

PROSPECTS AND OPPORTUNITIES

Preference for home-made and artisanal jams and preserves set to undermine demand

Imported brands to continue struggling as consumers prefer cheaper local products

Shift towards smaller pack sizes set to support growth in nut and seed based spreads

CATEGORY DATA

Table 51 - Sales of Sweet Spreads by Category: Volume 2018-2023

Table 52 - Sales of Sweet Spreads by Category: Value 2018-2023

Table 53 - Sales of Sweet Spreads by Category: % Volume Growth 2018-2023

Table 54 - Sales of Sweet Spreads by Category: % Value Growth 2018-2023

Table 55 - Sales of Jams and Preserves by Leading Flavours: Rankings 2018-2023

Table 56 - NBO Company Shares of Sweet Spreads: % Value 2019-2023

Table 57 - LBN Brand Shares of Sweet Spreads: % Value 2020-2023

Table 58 - Distribution of Sweet Spreads by Format: % Value 2018-2023

Table 59 - Forecast Sales of Sweet Spreads by Category: Volume 2023-2028

Table 60 - Forecast Sales of Sweet Spreads by Category: Value 2023-2028

Table 61 - Forecast Sales of Sweet Spreads by Category: % Volume Growth 2023-2028

Table 62 - Forecast Sales of Sweet Spreads 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/cooking-ingredients-and-meals-in-ukraine/report.