Euromonitor International

Staple Foods in Ukraine

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Staple Foods in Ukraine

EXECUTIVE SUMMARY

Extreme price sensitivity in an uncertain climate

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Economic strife shapes demand patterns
Healthy lines remain important to consumers in staple foods
Strong patriotism and desire to buy local

WHAT'S NEXT?

Focus on price and affordability will stimulate volume sales
Ukraine's economy will determine the category's performance
Retail e-commerce has strong growth potential

COMPETITIVE LANDSCAPE

Fragmented landscape is led by local manufacturers
Success of Balconi highlights desire for everyday indulgence
Local manufacturers are supported by national cashback program

CHANNELS

Supermarkets grow share in difficult economic climate
Retail e-commerce enjoys growth from low base
Variety store Avrora expands the "one dollar store" format

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Baked goods show resilience with steady performance

INDUSTRY PERFORMANCE

Baked goods rebound with premiumisation and product innovations

Convenience goods come with a premium twist
Frozen baked goods expand with affordable premium lines

WHAT'S NEXT?

Packaged cakes and frozen baked goods have the strongest growth opportunities
Healthier bread novelties are booming
Future opportunities for frozen cakes driven by imported innovations

COMPETITIVE LANDSCAPE

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Balconi performs well combining convenience with everyday indulgence

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2025 DEVELOPMENTS

Modest volume growth for breakfast cereals despite high inflation

INDUSTRY PERFORMANCE

Breakfast cereals taps into health and convenience trends
Muesli and granola enjoys growth from targeting younger generations

WHAT'S NEXT?

Continued transition from traditional cereals to ready-to-eat formats
Brands focus on healthy lifestyles to stay relevant

COMPETITIVE LANDSCAPE

Nestlé-Ukraine leads with key brands Nesquik and Fitness
Consumers are warming to affordable premium brands

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Solid performance reflects need for convenience and affordable healthy foods

INDUSTRY PERFORMANCE

Price inflation underpins strong double-digit value growth
Frozen fruit and vegetables are among the best-sellers

WHAT'S NEXT?

Convenience and changing behaviour will drive frozen fruit consumption
Shelf-stable vegetables and fruits are expected to become healthier
Specific frozen vegetables mixes will benefit as consumers look for ready-made solutions

COMPETITIVE LANDSCAPE

Local brand Veres leads with shelf-stable vegetables
Importer Vici gains share with frozen products

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KEY DATA FINDINGS

2025 DEVELOPMENTS

Demand remains steady despite soaring inflation

INDUSTRY PERFORMANCE

Consumption remains resilient as inflation spikes again
Chilled processed red meat benefits as consumers move away from fresh products

WHAT'S NEXT?

Meat alternatives is set to grow from low base
Meat-free products will mimic "regular" assortments
Processed seafood will be driven by health, convenience and some premiumisation

COMPETITIVE LANDSCAPE

Seafood leader Akvamarin invests to modernise its manufacturing plants
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Rice, Pasta and Noodles in Ukraine

KEY DATA FINDINGS

2025 DEVELOPMENTS

Consumption is rising well for pasta, rice and noodles

INDUSTRY PERFORMANCE

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Rice is the fastest growing category as consumption develops

WHAT'S NEXT?

Ukraine revives local rice cultivation
Pasta innovations made with corn and legumes
Mivina launches stir-fry noodles in Ukraine

COMPETITIVE LANDSCAPE

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Trapeza brand enjoys strong growth

CHANNELS

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