

Dairy Products and Alternatives in Ukraine

October 2023

Table of Contents

Dairy Products and Alternatives in Ukraine

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

Table 6 - Distribution of Dairy Products and Alternatives by Format: % Value 2018-2023

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

Table 8 - Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby Food in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Sales of baby food remain subdued due to the sharp decline in the population

The impact of the war on local factories and consumer perceptions is impacting the competitive landscape

New product development rife in 2023

PROSPECTS AND OPPORTUNITIES

Full recovery not anticipated as the war continues to cast a cloud on the category's future prospects

Growing focus on convenience likely to influence purchasing decisions within baby food

Baby food faces an uncertain future with demand likely to be influenced by the economy and the ongoing war

CATEGORY DATA

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

Table 10 - Sales of Baby Food by Category: Value 2018-2023

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

Table 12 - Sales of Baby Food by Category: % Value Growth 2018-2023

Table 13 - Sales of Growing-Up Milk Formula by Age: % Value 2018-2023

Table 14 - NBO Company Shares of Baby Food: % Value 2019-2023

Table 15 - LBN Brand Shares of Baby Food: % Value 2020-2023

Table 16 - Distribution of Baby Food by Format: % Value 2018-2023

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

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

Table 19 - Forecast Sales of Baby Food by Category: % Volume Growth 2023-2028

Table 20 - Forecast Sales of Baby Food by Category: % Value Growth 2023-2028

Butter and Spreads in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Local butter manufacturers benefiting from duty-free exports to the EU
Shrinkflation being seen in butter and spreads
Little change in the competitive landscape with local brands prevailing

PROSPECTS AND OPPORTUNITIES

Local producers look for opportunities in lactose-free butter
Price sensitivity likely to favour margarine and spreads
Plant-based spreads likely to remain a niche for now

CATEGORY DATA

Table 21 - Sales of Butter and Spreads by Category: Volume 2018-2023
Table 22 - Sales of Butter and Spreads by Category: Value 2018-2023
Table 23 - Sales of Butter and Spreads by Category: % Volume Growth 2018-2023
Table 24 - Sales of Butter and Spreads by Category: % Value Growth 2018-2023
Table 25 - NBO Company Shares of Butter and Spreads: % Value 2019-2023
Table 26 - LBN Brand Shares of Butter and Spreads: % Value 2020-2023
Table 27 - Distribution of Butter and Spreads by Format: % Value 2018-2023
Table 28 - Forecast Sales of Butter and Spreads by Category: Volume 2023-2028
Table 29 - Forecast Sales of Butter and Spreads by Category: Value 2023-2028
Table 30 - Forecast Sales of Butter and Spreads by Category: % Volume Growth 2023-2028
Table 31 - Forecast Sales of Butter and Spreads by Category: % Value Growth 2023-2028

Cheese in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers taking a more cautious approach to spending on cheese
Price sensitivity informing the competitive landscape
Lactalis takes control of Bel-Shostka

PROSPECTS AND OPPORTUNITIES

Cheese sales expected to see slow recovery backed by the popularity of affordable imported cheese
Soft cheese still full of potential
Small artisan/craft cheese producers seen to have a bright future

CATEGORY DATA

Table 32 - Sales of Cheese by Category: Volume 2018-2023
Table 33 - Sales of Cheese by Category: Value 2018-2023
Table 34 - Sales of Cheese by Category: % Volume Growth 2018-2023
Table 35 - Sales of Cheese by Category: % Value Growth 2018-2023
Table 36 - Sales of Spreadable Processed Cheese by Type: % Value 2018-2023
Table 37 - Sales of Soft Cheese by Type: % Value 2018-2023
Table 38 - Sales of Hard Cheese by Type: % Value 2018-2023
Table 39 - NBO Company Shares of Cheese: % Value 2019-2023
Table 40 - LBN Brand Shares of Cheese: % Value 2020-2023
Table 41 - Distribution of Cheese by Format: % Value 2018-2023
Table 42 - Forecast Sales of Cheese by Category: Volume 2023-2028
Table 43 - Forecast Sales of Cheese by Category: Value 2023-2028
Table 44 - Forecast Sales of Cheese by Category: % Volume Growth 2023-2028
Table 45 - Forecast Sales of Cheese by Category: % Value Growth 2023-2028

Drinking Milk Products in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Cow's milk dominates sales with its recovery being supported by price controls
Legal reforms in the pipeline for Ukraine's dairy industry
Milk production shifts focus to central and western regions due to the impact of Russia's war in Ukraine

PROSPECTS AND OPPORTUNITIES

Shelf-stable milk receiving growing attention from manufacturers
Packaging a key focus on new product development as players adapt their products to meet the needs of local consumers
Lactose-free milk offers up opportunities for growth and development

CATEGORY DATA

Table 46 - Sales of Drinking Milk Products by Category: Volume 2018-2023
Table 47 - Sales of Drinking Milk Products by Category: Value 2018-2023
Table 48 - Sales of Drinking Milk Products by Category: % Volume Growth 2018-2023
Table 49 - Sales of Drinking Milk Products by Category: % Value Growth 2018-2023
Table 50 - NBO Company Shares of Drinking Milk Products: % Value 2019-2023
Table 51 - LBN Brand Shares of Drinking Milk Products: % Value 2020-2023
Table 52 - Distribution of Drinking Milk Products by Format: % Value 2018-2023
Table 53 - Forecast Sales of Drinking Milk Products Products by Category: Volume 2023-2028
Table 54 - Forecast Sales of Drinking Milk Products Products by Category: Value 2023-2028
Table 55 - Forecast Sales of Drinking Milk Products Products by Category: % Volume Growth 2023-2028
Table 56 - Forecast Sales of Drinking Milk Products Products by Category: % Value Growth 2023-2028

Yoghurt and Sour Milk Products in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Yoghurt sales hardest by the war
PepsiCo and Danone's challenges open up opportunities for new players
Leading players launch new products in 2023 as they aim to kickstart a recovery

PROSPECTS AND OPPORTUNITIES

Flow packs influencing new product development as manufacturers look for cost savings
Focus on health and indulgence expected to drive the recovery of yoghurt
Players display messages of solidarity in their marketing

CATEGORY DATA

Table 57 - Sales of Yoghurt and Sour Milk Products by Category: Volume 2018-2023
Table 58 - Sales of Yoghurt and Sour Milk Products by Category: Value 2018-2023
Table 59 - Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2018-2023
Table 60 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2018-2023
Table 61 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2019-2023
Table 62 - LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2020-2023
Table 63 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2018-2023
Table 64 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2023-2028
Table 65 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2023-2028
Table 66 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2023-2028
Table 67 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2023-2028

Other Dairy in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Condensed milk brings some stability to other dairy
Chilled dairy desserts and chilled snacks suffer heavy losses as children flee Ukraine
Danone renames Prostokvashino brand due to associations with Russia

PROSPECTS AND OPPORTUNITIES

Lactose-free products capture the attention of dairy manufacturers
Packaging likely to be targeted as a cost-cutting measure
Sales expected to continue shifting towards packaged plain fromage frais and quark

CATEGORY DATA

Table 68 - Sales of Other Dairy by Category: Volume 2018-2023
Table 69 - Sales of Other Dairy by Category: Value 2018-2023
Table 70 - Sales of Other Dairy by Category: % Volume Growth 2018-2023
Table 71 - Sales of Other Dairy by Category: % Value Growth 2018-2023
Table 72 - Sales of Cream by Type: % Value 2018-2023
Table 73 - NBO Company Shares of Other Dairy: % Value 2019-2023
Table 74 - LBN Brand Shares of Other Dairy: % Value 2020-2023
Table 75 - Distribution of Other Dairy by Format: % Value 2018-2023
Table 76 - Forecast Sales of Other Dairy by Category: Volume 2023-2028
Table 77 - Forecast Sales of Other Dairy by Category: Value 2023-2028
Table 78 - Forecast Sales of Other Dairy by Category: % Volume Growth 2023-2028
Table 79 - Forecast Sales of Other Dairy by Category: % Value Growth 2023-2028

Plant-Based Dairy in Ukraine

KEY DATA FINDINGS

2023 DEVELOPMENTS

Bob Snail enters plant-based dairy
Prices remain more stable as players look to build demand
Plant-based cheese remains a niche area with limited awareness, distribution or demand

PROSPECTS AND OPPORTUNITIES

Plant-based dairy facing several barriers to growth
Innovation expected to ramp up again in plant-based milk
Plant-based yoghurt could benefit from healthy image

CATEGORY DATA

Table 80 - Sales of Plant-Based Dairy by Category: Value 2018-2023
Table 81 - Sales of Plant-Based Dairy by Category: % Value Growth 2018-2023
Table 82 - Sales of Other Plant-Based Milk by Type: % Value 2020-2023
Table 83 - NBO Company Shares of Plant-Based Dairy: % Value 2019-2023
Table 84 - LBN Brand Shares of Plant-Based Dairy: % Value 2020-2023
Table 85 - Distribution of Plant-Based Dairy by Format: % Value 2018-2023
Table 86 - Forecast Sales of Plant-Based Dairy by Category: Value 2023-2028
Table 87 - Forecast Sales of Plant-Based 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-ukraine/report.