

## **Staple Foods in Ukraine**

Market Direction | 2023-11-24 | 67 pages | Euromonitor

### **AVAILABLE LICENSES:**

- Single User Licence €1750.00
- Multiple User License (1 Site) €3500.00
- Multiple User License (Global) €5250.00

### **Report description:**

The biggest story in staple foods in Ukraine in 2023 was that all sales in all categories were still being significantly impacted by the ongoing war that rages in many parts of the country as well as high inflation due to the collapsing exchange value of the hryvnia. While retail volume growth was positive across the industry, this followed strong double-digit declines in all categories of staple foods in 2022 as the Russian Federation's invasion of Ukraine reduced the overall size of the consum...

Euromonitor International's Staple Foods in Ukraine report offers in-depth knowledge of the market at a national level, providing local insight and understanding unavailable elsewhere. In addition to the latest retail sales data 2018-2022, it identifies the leading companies, brands and retail outlets, and assesses the key trends and demographic shifts behind consumer demand and sales growth. How key trends such as health and wellness, sustainability and recovery from the pandemic are shaping the market in <|Year|> directly informs our forecasts to 2027, clearly indicating how the market is expected to change.

Product coverage: Baked Goods, Breakfast Cereals, Processed Fruit and Vegetables, Processed Meat, Seafood and Alternatives to Meat, Rice, Pasta and Noodles.

Data coverage: market sizes (historic and forecasts), company shares, brand shares and distribution data.

#### **Why buy this report?**

- \* Get a detailed picture of the Staple Foods market;
- \* Pinpoint growth sectors and identify factors driving change;
- \* Understand the competitive environment, the market's major players and leading brands;
- \* Use five-year forecasts to assess how the market is predicted to develop.

Euromonitor International has over 40 years' experience of publishing market research reports, business reference books and online information systems. With offices in London, Chicago, Singapore, Shanghai, Vilnius, Dubai, Cape Town, Santiago, Sydney, Tokyo and Bangalore and a network of over 800 analysts worldwide, Euromonitor International has a unique capability to develop

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

reliable information resources to help drive informed strategic planning.

## **Table of Contents:**

Staple Foods in Ukraine  
Euromonitor International  
November 2023

List Of Contents And Tables

### **STAPLE FOODS IN UKRAINE**

#### **EXECUTIVE SUMMARY**

Staple foods in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for staple foods?

#### **MARKET DATA**

Table 1 Sales of Staple Foods by Category: Volume 2018-2023

Table 2 Sales of Staple Foods by Category: Value 2018-2023

Table 3 Sales of Staple Foods by Category: % Volume Growth 2018-2023

Table 4 Sales of Staple Foods by Category: % Value Growth 2018-2023

Table 5 NBO Company Shares of Staple Foods: % Value 2019-2023

Table 6 LBN Brand Shares of Staple Foods: % Value 2020-2023

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

Table 8 Distribution of Staple Foods by Format: % Value 2018-2023

Table 9 Forecast Sales of Staple Foods by Category: Volume 2023-2028

Table 10 □Forecast Sales of Staple Foods by Category: Value 2023-2028

Table 11 □Forecast Sales of Staple Foods by Category: % Volume Growth 2023-2028

Table 12 □Forecast Sales of Staple Foods by Category: % Value Growth 2023-2028

#### **DISCLAIMER**

#### **SOURCES**

Summary 1 Research Sources

### **BAKED GOODS IN UKRAINE**

#### **KEY DATA FINDINGS**

#### **2023 DEVELOPMENTS**

Positive retail volume growth for bread as price controls support rising demand

A robust recovery for cakes during 2023 after a dismal year for the category in 2022

Russian invasion plays havoc with manufacturing operations of key category players

#### **PROSPECTS AND OPPORTUNITIES**

Health and wellness set to become a major influence over demand for bread

Aesthetics to become more important in cakes as consumers become more demanding

Frozen baked goods slated for strong growth as consumers demand convenience and economy

#### **CATEGORY DATA**

Table 13 Sales of Baked Goods by Category: Volume 2018-2023

Table 14 Sales of Baked Goods by Category: Value 2018-2023

Table 15 Sales of Baked Goods by Category: % Volume Growth 2018-2023

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Table 16 Sales of Baked Goods by Category: % Value Growth 2018-2023

Table 17 NBO Company Shares of Baked Goods: % Value 2019-2023

Table 18 LBN Brand Shares of Baked Goods: % Value 2020-2023

Table 19 Distribution of Baked Goods by Format: % Value 2018-2023

Table 20 Forecast Sales of Baked Goods by Category: Volume 2023-2028

Table 21 Forecast Sales of Baked Goods by Category: Value 2023-2028

Table 22 □Forecast Sales of Baked Goods by Category: % Volume Growth 2023-2028

Table 23 □Forecast Sales of Baked Goods by Category: % Value Growth 2023-2028

#### BREAKFAST CEREALS IN UKRAINE

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Evacuation of women and children from conflict zones puts pressure on demand

The ready-to-eat nature of breakfast cereals supports demand during wartime

Harsh realities of armed conflict lead to challenges for category players to overcome

##### PROSPECTS AND OPPORTUNITIES

Local players to gain ground by taking advantage of relatively favourable scenario

Changing dietary habits set to prove positive for RTE cereals

Demand for muesli and granola set to rise as healthy eating becomes more important

##### CATEGORY DATA

Table 24 Sales of Breakfast Cereals by Category: Volume 2018-2023

Table 25 Sales of Breakfast Cereals by Category: Value 2018-2023

Table 26 Sales of Breakfast Cereals by Category: % Volume Growth 2018-2023

Table 27 Sales of Breakfast Cereals by Category: % Value Growth 2018-2023

Table 28 NBO Company Shares of Breakfast Cereals: % Value 2019-2023

Table 29 LBN Brand Shares of Breakfast Cereals: % Value 2020-2023

Table 30 Distribution of Breakfast Cereals by Format: % Value 2018-2023

Table 31 Forecast Sales of Breakfast Cereals by Category: Volume 2023-2028

Table 32 Forecast Sales of Breakfast Cereals by Category: Value 2023-2028

Table 33 □Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2023-2028

Table 34 □Forecast Sales of Breakfast Cereals by Category: % Value Growth 2023-2028

#### PROCESSED MEAT, SEAFOOD AND ALTERNATIVES TO MEAT IN UKRAINE

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Demand for processed seafood under pressure as the average unit price increases

Demand for processed meat rebounds strongly as consumers demand convenience

Meat and seafood substitutes remains a tiny category as demand comes under pressure

##### PROSPECTS AND OPPORTUNITIES

Meat and seafood substitutes poised to benefit from changing attitudes

Diminished leisure options to continue presenting opportunities for category players

Shelf stable meat to continue benefiting from eating habits picked up during wartime

##### CATEGORY DATA

Table 35 Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2018-2023

Table 36 Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2018-2023

Table 37 Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2018-2023

Table 38 Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2018-2023

Table 39 Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2018-2023

Table 40 Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2018-2023

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

Table 41 Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2018-2023  
Table 42 Sales of Frozen Processed Poultry by Type: % Value Breakdown 2018-2023  
Table 43 Sales of Frozen Processed Seafood by Type: % Value Breakdown 2018-2023  
Table 44 □NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2019-2023  
Table 45 □LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2020-2023  
Table 46 □Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2018-2023  
Table 47 □Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2023-2028  
Table 48 □Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2023-2028

#### PROCESSED FRUIT AND VEGETABLES IN UKRAINE

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Shelf stable fruit and vegetables outperforms other packaged food categories  
Armed conflict devastates the operations of key category players  
Fozzy Group introduces nutrition scores on the labels of its private label products

##### PROSPECTS AND OPPORTUNITIES

Frozen fruit and frozen processed vegetables to rebound strongly during post-war era  
A more diverse range of products expected to be seen as consumer tastes widen  
Private label set to make huge inroads as consumers prioritise value for money

##### CATEGORY DATA

Table 49 Sales of Processed Fruit and Vegetables by Category: Volume 2018-2023  
Table 50 Sales of Processed Fruit and Vegetables by Category: Value 2018-2023  
Table 51 Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2018-2023  
Table 52 Sales of Processed Fruit and Vegetables by Category: % Value Growth 2018-2023  
Table 53 Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2018-2023  
Table 54 NBO Company Shares of Processed Fruit and Vegetables: % Value 2019-2023  
Table 55 LBN Brand Shares of Processed Fruit and Vegetables: % Value 2020-2023  
Table 56 Distribution of Processed Fruit and Vegetables by Format: % Value 2018-2023  
Table 57 Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2023-2028  
Table 58 □Forecast Sales of Processed Fruit and Vegetables by Category: Value 2023-2028  
Table 59 □Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2023-2028  
Table 60 □Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2023-2028

#### RICE, PASTA AND NOODLES IN UKRAINE

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Pasta's status as an essential source of starchy carbohydrates supports demand  
Armed conflict influences major changes in the competitive environment in noodles  
Fewer barriers to entry in noodles make the category attractive to newcomers

##### PROSPECTS AND OPPORTUNITIES

The health and wellness trend set to influence demand for rice and pasta  
A more diverse range of products set to broaden the appeal of instant noodles  
Private label set to gain ground in pasta as consumers prioritise value for money

##### CATEGORY DATA

Table 61 Sales of Rice, Pasta and Noodles by Category: Volume 2018-2023  
Table 62 Sales of Rice, Pasta and Noodles by Category: Value 2018-2023  
Table 63 Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2018-2023  
Table 64 Sales of Rice, Pasta and Noodles by Category: % Value Growth 2018-2023  
Table 65 Sales of Instant Noodles by Leading Flavours: Rankings 2018-2023

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

[www.scotts-international.com](http://www.scotts-international.com)

Table 66 NBO Company Shares of Rice, Pasta and Noodles: % Value 2019-2023

Table 67 LBN Brand Shares of Rice, Pasta and Noodles: % Value 2020-2023

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

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

Table 70 □NBO Company Shares of Pasta: % Value 2019-2023

Table 71 □LBN Brand Shares of Pasta: % Value 2020-2023

Table 72 □NBO Company Shares of Noodles: % Value 2019-2023

Table 73 □LBN Brand Shares of Noodles: % Value 2020-2023

Table 74 □Distribution of Rice, Pasta and Noodles by Format: % Value 2018-2023

Table 75 □Distribution of Rice by Format: % Value 2018-2023

Table 76 □Distribution of Pasta by Format: % Value 2018-2023

Table 77 □Distribution of Noodles by Format: % Value 2018-2023

Table 78 □Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2023-2028

Table 79 □Forecast Sales of Rice, Pasta and Noodles by Category: Value 2023-2028

Table 80 □Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2023-2028

Table 81 □Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2023-2028

## Staple Foods in Ukraine

Market Direction | 2023-11-24 | 67 pages | Euromonitor

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

### ORDER FORM:

Select license	License	Price
	Single User Licence	€1750.00
	Multiple User License (1 Site)	€3500.00
	Multiple User License (Global)	€5250.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	2025-05-06
		Signature	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com