

## **Soft Drinks in Ukraine**

Market Direction | 2023-12-21 | 81 pages | Euromonitor

### **AVAILABLE LICENSES:**

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

### **Report description:**

Sales of soft drinks have been significantly impacted by Russia's war in Ukraine and soaring inflation. Besides the resulting decline in the population and the loss of territories, the market also faces other obstacles including consumers downtrading and looking to save money, including avoiding the purchase of non-essentials such as some soft drinks. The supply chain has also suffered as many factories, warehouses, and stores have been damaged since Russia's invasion. Players have been forced t...

Euromonitor International's Soft Drinks in Ukraine report offers a comprehensive guide to the size and shape of the market at a national level. It provides the latest retail sales data (2018-2022), allowing you to identify the sectors driving growth. It identifies the leading companies, the leading brands and offers strategic analysis of key factors influencing the market - be they legislative, distribution, packaging or pricing issues. Forecasts to 2027 illustrate how the market is set to change.

Product coverage: Asian Speciality Drinks, Bottled Water, Carbonates, Concentrates, Energy Drinks, Juice, RTD Coffee, RTD Tea, Sports Drinks.

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

Why buy this report?

- \* Get a detailed picture of the Soft Drinks 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 reliable information resources to help drive informed strategic planning.

**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 of Contents:

Soft Drinks in Ukraine  
Euromonitor International  
December 2023

### List Of Contents And Tables

#### SOFT DRINKS IN UKRAINE

##### EXECUTIVE SUMMARY

Soft drinks in 2023: The big picture

2023 key trends

Competitive landscape

Retailing developments

Foodservice vs retail split

What next for soft drinks?

##### MARKET DATA

Table 1 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2018-2023

Table 2 Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2018-2023

Table 3 Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2018-2023

Table 4 Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2018-2023

Table 5 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2022

Table 6 Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2022

Table 7 Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2022

Table 8 Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2022

Table 9 Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2018-2023

Table 10 □Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2018-2023

Table 11 □Off-trade Sales of Soft Drinks by Category: Value 2018-2023

Table 12 □Off-trade Sales of Soft Drinks by Category: % Value Growth 2018-2023

Table 13 □Sales of Soft Drinks by Total Fountain On-trade: Volume 2018-2023

Table 14 □Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2018-2023

Table 15 □NBO Company Shares of Total Soft Drinks (RTD): % Volume 2019-2023

Table 16 □LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2020-2023

Table 17 □NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2019-2023

Table 18 □LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2020-2023

Table 19 □NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2019-2023

Table 20 □LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2023

Table 21 □NBO Company Shares of Off-trade Soft Drinks: % Value 2019-2023

Table 22 □LBN Brand Shares of Off-trade Soft Drinks: % Value 2020-2023

Table 23 □Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2018-2023

Table 24 □Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2018-2023

Table 25 □Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2018-2023

Table 26 □Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2023

Table 27 □Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2023-2028

Table 28 □Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2023-2028

Table 29 □Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2023-2028

Table 30 □Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2023-2028

Table 31 □Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2023-2028

**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 32 □Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2023-2028

Table 33 □Forecast Off-trade Sales of Soft Drinks by Category: Value 2023-2028

Table 34 □Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2023-2028

Table 35 □Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2023-2028

Table 36 □Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2023-2028

## APPENDIX

Fountain sales in Ukraine

DISCLAIMER

SOURCES

Summary 1 Research Sources

CARBONATES IN UKRAINE

KEY DATA FINDINGS

2023 DEVELOPMENTS

Carbonates sees a partial recovery in 2023 after heavy losses in 2022, boosted by the return of local manufacturing

Mixed results being seen across carbonates

Competition becomes more fragmented as players face new challenges

PROSPECTS AND OPPORTUNITIES

Proposed sugar tax a potential threat to growth

Carbonates should benefit from positive image in the minds of locals

IDS Borjomi enters carbonates with new line of lemonade

CATEGORY DATA

Table 37 Off-trade vs On-trade Sales of Carbonates: Volume 2018-2023

Table 38 Off-trade vs On-trade Sales of Carbonates: Value 2018-2023

Table 39 Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2018-2023

Table 40 Off-trade vs On-trade Sales of Carbonates: % Value Growth 2018-2023

Table 41 Off-trade Sales of Carbonates by Category: Volume 2018-2023

Table 42 Off-trade Sales of Carbonates by Category: Value 2018-2023

Table 43 Off-trade Sales of Carbonates by Category: % Volume Growth 2018-2023

Table 44 Off-trade Sales of Carbonates by Category: % Value Growth 2018-2023

Table 45 Total Sales of Carbonates by Fountain On-trade: Volume 2018-2023

Table 46 □Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2018-2023

Table 47 □NBO Company Shares of Off-trade Carbonates: % Volume 2019-2023

Table 48 □LBN Brand Shares of Off-trade Carbonates: % Volume 2020-2023

Table 49 □NBO Company Shares of Off-trade Carbonates: % Value 2019-2023

Table 50 □LBN Brand Shares of Off-trade Carbonates: % Value 2020-2023

Table 51 □Forecast Off-trade Sales of Carbonates by Category: Volume 2023-2028

Table 52 □Forecast Off-trade Sales of Carbonates by Category: Value 2023-2028

Table 53 □Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2023-2028

Table 54 □Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2023-2028

Table 55 □Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2023-2028

Table 56 □Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2023-2028

JUICE IN UKRAINE

KEY DATA FINDINGS

2023 DEVELOPMENTS

Juice sales plummet as women and children flee the country

Geographic location of local manufacturing facilities has a big influence on the competitive landscape

Affordability the key influence on consumer purchasing decisions

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

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

www.scotts-international.com

## PROSPECTS AND OPPORTUNITIES

100% juice expected to benefit from healthier image

Several obstacles stand in the way of the recovery of juice

Increase in on-the-go consumption and impulse purchases should benefit sales

## CATEGORY DATA

Table 57 Off-trade Sales of Juice by Category: Volume 2018-2023

Table 58 Off-trade Sales of Juice by Category: Value 2018-2023

Table 59 Off-trade Sales of Juice by Category: % Volume Growth 2018-2023

Table 60 Off-trade Sales of Juice by Category: % Value Growth 2018-2023

Table 61 NBO Company Shares of Off-trade Juice: % Volume 2019-2023

Table 62 LBN Brand Shares of Off-trade Juice: % Volume 2020-2023

Table 63 NBO Company Shares of Off-trade Juice: % Value 2019-2023

Table 64 LBN Brand Shares of Off-trade Juice: % Value 2020-2023

Table 65 Forecast Off-trade Sales of Juice by Category: Volume 2023-2028

Table 66 □Forecast Off-trade Sales of Juice by Category: Value 2023-2028

Table 67 □Forecast Off-trade Sales of Juice by Category: % Volume Growth 2023-2028

Table 68 □Forecast Off-trade Sales of Juice by Category: % Value Growth 2023-2028

## BOTTLED WATER IN UKRAINE

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Stockpiling helps to prevent heavier losses in bottled water

Availability and affordability remain the main influences on the competitive landscape

Competitive landscape shaken up by the impact of sanctions policy

## PROSPECTS AND OPPORTUNITIES

The future of bottled water will be dictated by the outcome of Russia's war

Vitmark-Ukraine expected to support the development of functional bottled water

Economic stability should present a brighter outlook for sales of bottled water

## CATEGORY DATA

Table 69 Off-trade Sales of Bottled Water by Category: Volume 2018-2023

Table 70 Off-trade Sales of Bottled Water by Category: Value 2018-2023

Table 71 Off-trade Sales of Bottled Water by Category: % Volume Growth 2018-2023

Table 72 Off-trade Sales of Bottled Water by Category: % Value Growth 2018-2023

Table 73 NBO Company Shares of Off-trade Bottled Water: % Volume 2019-2023

Table 74 LBN Brand Shares of Off-trade Bottled Water: % Volume 2020-2023

Table 75 NBO Company Shares of Off-trade Bottled Water: % Value 2019-2023

Table 76 LBN Brand Shares of Off-trade Bottled Water: % Value 2020-2023

Table 77 Forecast Off-trade Sales of Bottled Water by Category: Volume 2023-2028

Table 78 □Forecast Off-trade Sales of Bottled Water by Category: Value 2023-2028

Table 79 □Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2023-2028

Table 80 □Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2023-2028

## SPORTS DRINKS IN UKRAINE

### KEY DATA FINDINGS

#### 2023 DEVELOPMENTS

Sports drinks remains a niche in Ukraine

Little change in the competitive landscape

Metal cans on the rise but sports drinks remains limited due to a lack of promotion or innovation

## PROSPECTS AND OPPORTUNITIES

**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)

Bleak outlook for sports drinks

Economic pressures likely to limit the growth of sports drinks

More options and greater marketing investment needed to grow the category

#### CATEGORY DATA

Table 81 Off-trade Sales of Sports Drinks: Volume 2018-2023

Table 82 Off-trade Sales of Sports Drinks: Value 2018-2023

Table 83 Off-trade Sales of Sports Drinks: % Volume Growth 2018-2023

Table 84 Off-trade Sales of Sports Drinks: % Value Growth 2018-2023

Table 85 NBO Company Shares of Off-trade Sports Drinks: % Volume 2019-2023

Table 86 LBN Brand Shares of Off-trade Sports Drinks: % Volume 2020-2023

Table 87 NBO Company Shares of Off-trade Sports Drinks: % Value 2019-2023

Table 88 LBN Brand Shares of Off-trade Sports Drinks: % Value 2020-2023

Table 89 Forecast Off-trade Sales of Sports Drinks: Volume 2023-2028

Table 90 □Forecast Off-trade Sales of Sports Drinks: Value 2023-2028

Table 91 □Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2023-2028

Table 92 □Forecast Off-trade Sales of Sports Drinks: % Value Growth 2023-2028

#### ENERGY DRINKS IN UKRAINE

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Russia's war in Ukraine brings unexpected dividends for energy drinks

Players look to expand their distribution reach in an effort to drive growth

Competitive landscape full of activity as players invest in innovation and new product development

##### PROSPECTS AND OPPORTUNITIES

Slower growth predicted as the category starts to show signs of maturity

Price competition likely to intensify as economic pressures persist

Proposed sugar tax presents a sizeable threat to energy drinks

#### CATEGORY DATA

Table 93 Off-trade Sales of Energy Drinks: Volume 2018-2023

Table 94 Off-trade Sales of Energy Drinks: Value 2018-2023

Table 95 Off-trade Sales of Energy Drinks: % Volume Growth 2018-2023

Table 96 Off-trade Sales of Energy Drinks: % Value Growth 2018-2023

Table 97 NBO Company Shares of Off-trade Energy Drinks: % Volume 2019-2023

Table 98 LBN Brand Shares of Off-trade Energy Drinks: % Volume 2020-2023

Table 99 NBO Company Shares of Off-trade Energy Drinks: % Value 2019-2023

Table 100 LBN Brand Shares of Off-trade Energy Drinks: % Value 2020-2023

Table 101 Forecast Off-trade Sales of Energy Drinks: Volume 2023-2028

Table 102 □Forecast Off-trade Sales of Energy Drinks: Value 2023-2028

Table 103 □Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2023-2028

Table 104 □Forecast Off-trade Sales of Energy Drinks: % Value Growth 2023-2028

#### CONCENTRATES IN UKRAINE

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

Low demand leads to limited investment in marketing and distribution although low prices help to boost sales in 2023

New product development continues to be seen despite limited demand

Products targeting sports and fitness enthusiasts showing promise

##### PROSPECTS AND OPPORTUNITIES

Bleak outlook for concentrates will players struggling to attract a younger audience

**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)

Iced coffee and health and wellness options offer potential areas for development

Players exploring new consumption occasions to trigger demand

#### CATEGORY DATA

##### Concentrates Conversions

Summary 2 Concentrates Conversion Factors for Ready-to-Drink (RTD) Format

Table 105 Off-trade Sales of Concentrates (RTD) by Category: Volume 2018-2023

Table 106 Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2018-2023

Table 107 Off-trade Sales of Concentrates by Category: Value 2018-2023

Table 108 Off-trade Sales of Concentrates by Category: % Value Growth 2018-2023

Table 109 LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2020-2023

Table 110 NBO Company Shares of Off-trade Concentrates: % Value 2019-2023

Table 111 LBN Brand Shares of Off-trade Concentrates: % Value 2020-2023

Table 112 NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2019-2023

Table 113 LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2023

Table 114 □NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2019-2023

Table 115 □LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2023

Table 116 □Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2023-2028

Table 117 □Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2023-2028

Table 118 □Forecast Off-trade Sales of Concentrates by Category: Value 2023-2028

Table 119 □Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2023-2028

#### RTD TEA IN UKRAINE

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

RTD tea struggling to establish a strong foothold in the market

Russia's war disrupts the competitive landscape with private label seeing significant gains

Competitive landscape becomes more fragmented as retailers look to address the challenging market conditions

##### PROSPECTS AND OPPORTUNITIES

RTD tea set for steady recovery although challenges will likely persist

Economic uncertainty and the proposed sugar tax likely to weigh on the future of RTD tea

Kombucha stirring up interest among health-conscious consumers

#### CATEGORY DATA

Table 120 Off-trade Sales of RTD Tea by Category: Volume 2018-2023

Table 121 Off-trade Sales of RTD Tea by Category: Value 2018-2023

Table 122 Off-trade Sales of RTD Tea by Category: % Volume Growth 2018-2023

Table 123 Off-trade Sales of RTD Tea by Category: % Value Growth 2018-2023

Table 124 Leading Flavours for Off-trade RTD Tea: % Volume 2018-2023

Table 125 NBO Company Shares of Off-trade RTD Tea: % Volume 2019-2023

Table 126 LBN Brand Shares of Off-trade RTD Tea: % Volume 2020-2023

Table 127 NBO Company Shares of Off-trade RTD Tea: % Value 2019-2023

Table 128 LBN Brand Shares of Off-trade RTD Tea: % Value 2020-2023

Table 129 □Forecast Off-trade Sales of RTD Tea by Category: Volume 2023-2028

Table 130 □Forecast Off-trade Sales of RTD Tea by Category: Value 2023-2028

Table 131 □Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2023-2028

Table 132 □Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2023-2028

#### RTD COFFEE IN UKRAINE

##### KEY DATA FINDINGS

##### 2023 DEVELOPMENTS

**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)

RTD coffee bounces back strongly in 2023

Competition heating up as new players enter the market

Consumers focusing on indulgence

#### PROSPECTS AND OPPORTUNITIES

RTD coffee set for dynamic growth as interest builds

Coffee appearing in other soft drinks as players look to add new novelties

Challenges remain to wider acceptance of RTD coffee

#### CATEGORY DATA

Table 133 Off-trade Sales of RTD Coffee: Volume 2018-2023

Table 134 Off-trade Sales of RTD Coffee: Value 2018-2023

Table 135 Off-trade Sales of RTD Coffee: % Volume Growth 2018-2023

Table 136 Off-trade Sales of RTD Coffee: % Value Growth 2018-2023

Table 137 NBO Company Shares of Off-trade RTD Coffee: % Volume 2019-2023

Table 138 LBN Brand Shares of Off-trade RTD Coffee: % Volume 2020-2023

Table 139 NBO Company Shares of Off-trade RTD Coffee: % Value 2019-2023

Table 140 LBN Brand Shares of Off-trade RTD Coffee: % Value 2020-2023

Table 141 Forecast Off-trade Sales of RTD Coffee: Volume 2023-2028

Table 142 □Forecast Off-trade Sales of RTD Coffee: Value 2023-2028

Table 143 □Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2023-2028

Table 144 □Forecast Off-trade Sales of RTD Coffee: % Value Growth 2023-2028

**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)

## Soft Drinks in Ukraine

Market Direction | 2023-12-21 | 81 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	<input type="text" value="2025-05-05"/>
		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