



**Euromonitor
International**

Soft Drinks in Ukraine

December 2024

Table of Contents

EXECUTIVE SUMMARY

- Soft drinks in 2024: The big picture
- 2024 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 2019-2024
- Table 2 - Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2019-2024
- Table 3 - Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2019-2024
- Table 4 - Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2019-2024
- Table 5 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: Volume 2024
- Table 6 - Off-trade vs On-trade Sales of Soft Drinks (as sold) by Category: % Volume 2024
- Table 7 - Off-trade vs On-trade Sales of Soft Drinks by Category: Value 2024
- Table 8 - Off-trade vs On-trade Sales of Soft Drinks by Category: % Value 2024
- Table 9 - Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2019-2024
- Table 10 - Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2019-2024
- Table 11 - Off-trade Sales of Soft Drinks by Category: Value 2019-2024
- Table 12 - Off-trade Sales of Soft Drinks by Category: % Value Growth 2019-2024
- Table 13 - Sales of Soft Drinks by Total Fountain On-trade: Volume 2019-2024
- Table 14 - Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2019-2024
- Table 15 - NBO Company Shares of Total Soft Drinks (RTD): % Volume 2020-2024
- Table 16 - LBN Brand Shares of Total Soft Drinks (RTD): % Volume 2021-2024
- Table 17 - NBO Company Shares of On-trade Soft Drinks (RTD): % Volume 2020-2024
- Table 18 - LBN Brand Shares of On-trade Soft Drinks (RTD): % Volume 2021-2024
- Table 19 - NBO Company Shares of Off-trade Soft Drinks (RTD): % Volume 2020-2024
- Table 20 - LBN Brand Shares of Off-trade Soft Drinks (RTD): % Volume 2021-2024
- Table 21 - NBO Company Shares of Off-trade Soft Drinks: % Value 2020-2024
- Table 22 - LBN Brand Shares of Off-trade Soft Drinks: % Value 2021-2024
- Table 23 - Penetration of Private Label in Off-trade Soft Drinks (RTD) by Category: % Volume 2019-2024
- Table 24 - Penetration of Private Label in Off-trade Soft Drinks by Category: % Value 2019-2024
- Table 25 - Distribution of Off-trade Soft Drinks (as sold) by Format: % Volume 2019-2024
- Table 26 - Distribution of Off-trade Soft Drinks (as sold) by Format and Category: % Volume 2024
- Table 27 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: Volume 2024-2029
- Table 28 - Forecast Off-trade vs On-trade Sales of Soft Drinks (RTD) by Channel: % Volume Growth 2024-2029
- Table 29 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: Value 2024-2029
- Table 30 - Forecast Off-trade vs On-trade Sales of Soft Drinks by Channel: % Value Growth 2024-2029
- Table 31 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: Volume 2024-2029
- Table 32 - Forecast Off-trade Sales of Soft Drinks (RTD) by Category: % Volume Growth 2024-2029
- Table 33 - Forecast Off-trade Sales of Soft Drinks by Category: Value 2024-2029
- Table 34 - Forecast Off-trade Sales of Soft Drinks by Category: % Value Growth 2024-2029
- Table 35 - Forecast Sales of Soft Drinks by Total Fountain On-trade: Volume 2024-2029
- Table 36 - Forecast Sales of Soft Drinks by Total Fountain On-trade: % Volume Growth 2024-2029

APPENDIX

- Fountain sales in Ukraine

DISCLAIMER

SOURCES

Bottled Water in Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Bottled water is considered an essential, while growth benefits from flavour innovation

Borjomi water loses ground due sanctions against Russia-related businesses

New brands enter the category, offering functional bottled water to consumers

PROSPECTS AND OPPORTUNITIES

Sales will benefit from ongoing health and safety concerns surrounding tap water

Ongoing innovation is expected to fuel growth in functional bottled water

Retail volume sales will be challenged by water delivery services in Ukraine

CATEGORY DATA

Table 37 - Off-trade Sales of Bottled Water by Category: Volume 2019-2024

Table 38 - Off-trade Sales of Bottled Water by Category: Value 2019-2024

Table 39 - Off-trade Sales of Bottled Water by Category: % Volume Growth 2019-2024

Table 40 - Off-trade Sales of Bottled Water by Category: % Value Growth 2019-2024

Table 41 - NBO Company Shares of Off-trade Bottled Water: % Volume 2020-2024

Table 42 - LBN Brand Shares of Off-trade Bottled Water: % Volume 2021-2024

Table 43 - NBO Company Shares of Off-trade Bottled Water: % Value 2020-2024

Table 44 - LBN Brand Shares of Off-trade Bottled Water: % Value 2021-2024

Table 45 - Forecast Off-trade Sales of Bottled Water by Category: Volume 2024-2029

Table 46 - Forecast Off-trade Sales of Bottled Water by Category: Value 2024-2029

Table 47 - Forecast Off-trade Sales of Bottled Water by Category: % Volume Growth 2024-2029

Table 48 - Forecast Off-trade Sales of Bottled Water by Category: % Value Growth 2024-2029

Carbonates in Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Local production and product innovation boosts growth in carbonates during 2024

Premiumisation rises in carbonates as consumers seek affordable luxuries

The traditional fermented beverage, kvas, gains ground during 2024

PROSPECTS AND OPPORTUNITIES

Off-trade volume sales set to rise, driven by demand for on-the-go options and affordable indulgences

The growing popularity of gin will boosts sale of tonic across the next five years

Healthier carbonates expected to gain ground, driven by innovation across the forecast period

CATEGORY DATA

Table 49 - Off-trade vs On-trade Sales of Carbonates: Volume 2019-2024

Table 50 - Off-trade vs On-trade Sales of Carbonates: Value 2019-2024

Table 51 - Off-trade vs On-trade Sales of Carbonates: % Volume Growth 2019-2024

Table 52 - Off-trade vs On-trade Sales of Carbonates: % Value Growth 2019-2024

Table 53 - Off-trade Sales of Carbonates by Category: Volume 2019-2024

Table 54 - Off-trade Sales of Carbonates by Category: Value 2019-2024

Table 55 - Off-trade Sales of Carbonates by Category: % Volume Growth 2019-2024

Table 56 - Off-trade Sales of Carbonates by Category: % Value Growth 2019-2024

Table 57 - Total Sales of Carbonates by Fountain On-trade: Volume 2019-2024

Table 58 - Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2019-2024

Table 59 - NBO Company Shares of Off-trade Carbonates: % Volume 2020-2024

Table 60 - LBN Brand Shares of Off-trade Carbonates: % Volume 2021-2024

Table 61 - NBO Company Shares of Off-trade Carbonates: % Value 2020-2024

Table 62 - LBN Brand Shares of Off-trade Carbonates: % Value 2021-2024

Table 63 - Forecast Off-trade Sales of Carbonates by Category: Volume 2024-2029

Table 64 - Forecast Off-trade Sales of Carbonates by Category: Value 2024-2029

Table 65 - Forecast Off-trade Sales of Carbonates by Category: % Volume Growth 2024-2029

Table 66 - Forecast Off-trade Sales of Carbonates by Category: % Value Growth 2024-2029

Table 67 - Forecast Total Sales of Carbonates by Fountain On-trade: Volume 2024-2029

Table 68 - Forecast Total Sales of Carbonates by Fountain On-trade: % Volume Growth 2024-2029

Concentrates in Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Slow recovery as concentrates fail to align with current consumer trends

RTD options are strong competition for concentrates in 2024

Iced coffee and tea powder concentrates are challenged by chilled coffee and tea

PROSPECTS AND OPPORTUNITIES

Increasing awareness and improving retail availability could fuel growth in concentrates

The trend of home mixology creates growth opportunities for concentrates

There is an opportunity for kvas to expand in the concentrates category

CATEGORY DATA

Concentrates Conversions

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

Table 69 - Off-trade Sales of Concentrates (RTD) by Category: Volume 2019-2024

Table 70 - Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2019-2024

Table 71 - Off-trade Sales of Concentrates by Category: Value 2019-2024

Table 72 - Off-trade Sales of Concentrates by Category: % Value Growth 2019-2024

Table 73 - LBN Brand Shares of Off-trade Concentrates (RTD): % Volume 2021-2024

Table 74 - NBO Company Shares of Off-trade Concentrates: % Value 2020-2024

Table 75 - LBN Brand Shares of Off-trade Concentrates: % Value 2021-2024

Table 76 - NBO Company Shares of Off-trade Liquid Concentrates (RTD): % Volume 2020-2024

Table 77 - LBN Brand Shares of Off-trade Liquid Concentrates (RTD): % Volume 2021-2024

Table 78 - NBO Company Shares of Off-trade Powder Concentrates (RTD): % Volume 2020-2024

Table 79 - LBN Brand Shares of Off-trade Powder Concentrates (RTD): % Volume 2021-2024

Table 80 - Forecast Off-trade Sales of Concentrates (RTD) by Category: Volume 2024-2029

Table 81 - Forecast Off-trade Sales of Concentrates (RTD) by Category: % Volume Growth 2024-2029

Table 82 - Forecast Off-trade Sales of Concentrates by Category: Value 2024-2029

Table 83 - Forecast Off-trade Sales of Concentrates by Category: % Value Growth 2024-2029

Juice in Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Positive retail volume growth driven by a return to trusted juice brands

Supply chain disruptions, rising production costs and an orange shortage impacts the category

Sandora TOV loses share as Vitmark-Ukraine retains its lead through new launches

PROSPECTS AND OPPORTUNITIES

Juice sales expected to benefit from healthier positionings and demand for on-the-go options
Home mixology has the potential to drives sales and increases the consumer base for juice
Juice players are expected to offer products with lower juice content to remain affordable

CATEGORY DATA

- Table 84 - Off-trade Sales of Juice by Category: Volume 2019-2024
- Table 85 - Off-trade Sales of Juice by Category: Value 2019-2024
- Table 86 - Off-trade Sales of Juice by Category: % Volume Growth 2019-2024
- Table 87 - Off-trade Sales of Juice by Category: % Value Growth 2019-2024
- Table 88 - NBO Company Shares of Off-trade Juice: % Volume 2020-2024
- Table 89 - LBN Brand Shares of Off-trade Juice: % Volume 2021-2024
- Table 90 - NBO Company Shares of Off-trade Juice: % Value 2020-2024
- Table 91 - LBN Brand Shares of Off-trade Juice: % Value 2021-2024
- Table 92 - Forecast Off-trade Sales of Juice by Category: Volume 2024-2029
- Table 93 - Forecast Off-trade Sales of Juice by Category: Value 2024-2029
- Table 94 - Forecast Off-trade Sales of Juice by Category: % Volume Growth 2024-2029
- Table 95 - Forecast Off-trade Sales of Juice by Category: % Value Growth 2024-2029

RTD Coffee in Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Increased availability and product expansion boosts retail volume growth in 2024
Growth is challenged by competition from foodservice and premium price points
The strong leadership from Jacobs Ukranina and Hell Energy Drinks continues

PROSPECTS AND OPPORTUNITIES

Innovations are set to fuel ongoing retail volume growth in the RTD coffee category
Rising consumer awareness and warmer weather will drive sales of RTD coffee
The high price point will continue to challenge sales of RTD coffee

CATEGORY DATA

- Table 96 - Off-trade Sales of RTD Coffee: Volume 2019-2024
- Table 97 - Off-trade Sales of RTD Coffee: Value 2019-2024
- Table 98 - Off-trade Sales of RTD Coffee: % Volume Growth 2019-2024
- Table 99 - Off-trade Sales of RTD Coffee: % Value Growth 2019-2024
- Table 100 - NBO Company Shares of Off-trade RTD Coffee: % Volume 2020-2024
- Table 101 - LBN Brand Shares of Off-trade RTD Coffee: % Volume 2021-2024
- Table 102 - NBO Company Shares of Off-trade RTD Coffee: % Value 2020-2024
- Table 103 - LBN Brand Shares of Off-trade RTD Coffee: % Value 2021-2024
- Table 104 - Forecast Off-trade Sales of RTD Coffee: Volume 2024-2029
- Table 105 - Forecast Off-trade Sales of RTD Coffee: Value 2024-2029
- Table 106 - Forecast Off-trade Sales of RTD Coffee: % Volume Growth 2024-2029
- Table 107 - Forecast Off-trade Sales of RTD Coffee: % Value Growth 2024-2029

RTD Tea in Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Lack of innovation and limited price promotions hinder stronger growth in RTD tea
Limited assortment in Still RTD tea as consumers shift toward healthier alternatives

Private label rises as leader Coca-Cola and Erlan ZAT face disruptions

PROSPECTS AND OPPORTUNITIES

There is limited growth potential for Still RTD tea across the next five years

Bubble tea will continue to gain ground among Generation Z consumers

Health and wellness benefits drive product innovation to align with consumer demands

CATEGORY DATA

Table 108 - Off-trade Sales of RTD Tea by Category: Volume 2019-2024

Table 109 - Off-trade Sales of RTD Tea by Category: Value 2019-2024

Table 110 - Off-trade Sales of RTD Tea by Category: % Volume Growth 2019-2024

Table 111 - Off-trade Sales of RTD Tea by Category: % Value Growth 2019-2024

Table 112 - Leading Flavours for Off-trade RTD Tea: % Volume 2019-2024

Table 113 - NBO Company Shares of Off-trade RTD Tea: % Volume 2020-2024

Table 114 - LBN Brand Shares of Off-trade RTD Tea: % Volume 2021-2024

Table 115 - NBO Company Shares of Off-trade RTD Tea: % Value 2020-2024

Table 116 - LBN Brand Shares of Off-trade RTD Tea: % Value 2021-2024

Table 117 - Forecast Off-trade Sales of RTD Tea by Category: Volume 2024-2029

Table 118 - Forecast Off-trade Sales of RTD Tea by Category: Value 2024-2029

Table 119 - Forecast Off-trade Sales of RTD Tea by Category: % Volume Growth 2024-2029

Table 120 - Forecast Off-trade Sales of RTD Tea by Category: % Value Growth 2024-2029

Energy Drinks in Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

Innovation and intense competition boosts retail volume sales in energy drinks

Larger packaging formats gain ground as consumers look for cost saving solutions

Energy drinks move beyond gamers to become a mainstream soft drink option

PROSPECTS AND OPPORTUNITIES

Competition from other soft drink options will place pressure on energy drinks

Limited potential for reduced sugar energy drinks despite rising health trends

Flavour variation will be key to brand strategies across the forecast period

CATEGORY DATA

Table 121 - Off-trade Sales of Energy Drinks: Volume 2019-2024

Table 122 - Off-trade Sales of Energy Drinks: Value 2019-2024

Table 123 - Off-trade Sales of Energy Drinks: % Volume Growth 2019-2024

Table 124 - Off-trade Sales of Energy Drinks: % Value Growth 2019-2024

Table 125 - NBO Company Shares of Off-trade Energy Drinks: % Volume 2020-2024

Table 126 - LBN Brand Shares of Off-trade Energy Drinks: % Volume 2021-2024

Table 127 - NBO Company Shares of Off-trade Energy Drinks: % Value 2020-2024

Table 128 - LBN Brand Shares of Off-trade Energy Drinks: % Value 2021-2024

Table 129 - Forecast Off-trade Sales of Energy Drinks: Volume 2024-2029

Table 130 - Forecast Off-trade Sales of Energy Drinks: Value 2024-2029

Table 131 - Forecast Off-trade Sales of Energy Drinks: % Volume Growth 2024-2029

Table 132 - Forecast Off-trade Sales of Energy Drinks: % Value Growth 2024-2029

Sports Drinks in Ukraine

KEY DATA FINDINGS

2024 DEVELOPMENTS

The recovery for sport drinks is challenged by a lack of outdoor sporting events
Demand for isotonic drinks surge as consumers appreciate the health benefits
SV-Dnipro TOV retains its strong lead, investing in promotion for 4Move

PROSPECTS AND OPPORTUNITIES

Energy drinks and functional bottled water challenge sales of sports drinks over the forecast period
Brands could invest in clear retail positioning to boost instore sales of sports drinks
The rising demand for functional beverages will support sales of sports drinks

CATEGORY DATA

Table 133 - Off-trade Sales of Sports Drinks: Volume 2019-2024
Table 134 - Off-trade Sales of Sports Drinks: Value 2019-2024
Table 135 - Off-trade Sales of Sports Drinks: % Volume Growth 2019-2024
Table 136 - Off-trade Sales of Sports Drinks: % Value Growth 2019-2024
Table 137 - NBO Company Shares of Off-trade Sports Drinks: % Volume 2020-2024
Table 138 - LBN Brand Shares of Off-trade Sports Drinks: % Volume 2021-2024
Table 139 - NBO Company Shares of Off-trade Sports Drinks: % Value 2020-2024
Table 140 - LBN Brand Shares of Off-trade Sports Drinks: % Value 2021-2024
Table 141 - Forecast Off-trade Sales of Sports Drinks: Volume 2024-2029
Table 142 - Forecast Off-trade Sales of Sports Drinks: Value 2024-2029
Table 143 - Forecast Off-trade Sales of Sports Drinks: % Volume Growth 2024-2029
Table 144 - Forecast Off-trade Sales of Sports Drinks: % Value Growth 2024-2029

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/soft-drinks-in-ukraine/report.