



Staple Foods in Ukraine

November 2025

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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

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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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KEY DATA FINDINGS

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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

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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

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Importer Vici gains share with frozen products

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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

Rice, pasta and noodles benefit as core categories for daily nutrition

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

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