



Passport

Butter and Spreads in Uzbekistan

Euromonitor International

September 2021

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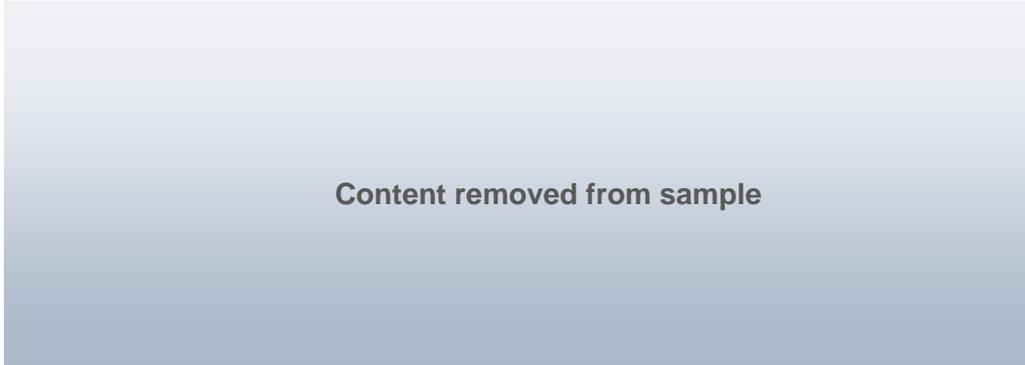
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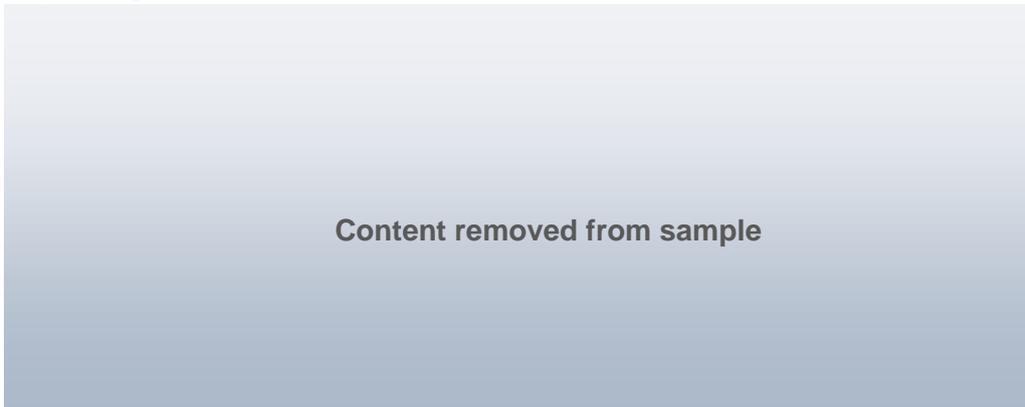
BUTTER AND SPREADS IN UZBEKISTAN - CATEGORY ANALYSIS

KEY DATA FINDINGS

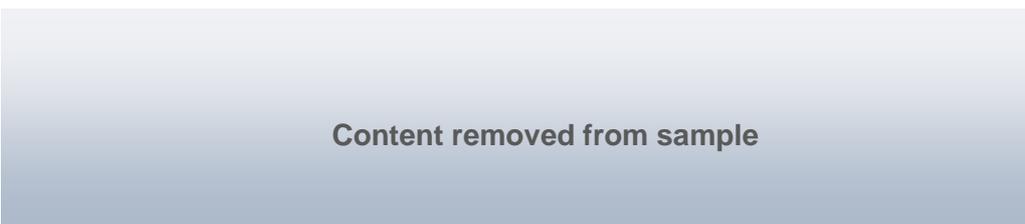


2021 DEVELOPMENTS

As the pandemic rages on in 2021 consumers continue to seek the hygiene benefits of packaged butter and spreads over traditional unpackaged variants



New tax poses major constraint for butter in Uzbekistan as unstable milk supply makes production difficult



Nestlé Uzbekistan LLC increases leadership in 2021 thanks to its firm reputation as A producer of high-quality butter

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PROSPECTS AND OPPORTUNITIES

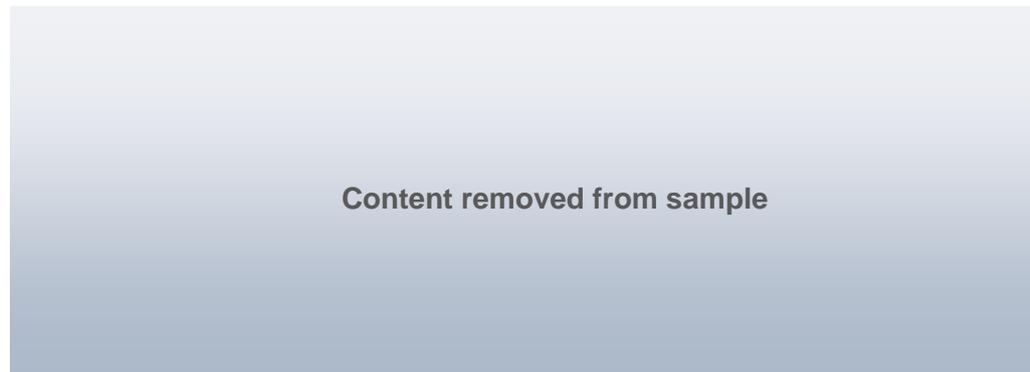
Margarine and spreads expected to continue to drive growth

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Expensive butter will suffer as consumers return to cheaper bazaar products

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Potential for expansion through new players and government funding for agriculture



CATEGORY DATA

Table 1 Sales of Butter and Spreads by Category: Volume 2016-2021

'000 tonnes	2016	2017	2018	2019	2020	2021
- Cooking Fats	Data removed from sample					
- Butter						
- Margarine and Spreads						
Butter and Spreads						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of Butter and Spreads by Category: Value 2016-2021

UZS billion	2016	2017	2018	2019	2020	2021
- Cooking Fats	Data removed from sample					
- Butter						
- Margarine and Spreads						
Butter and Spreads						

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 3 Sales of Butter and Spreads by Category: % Volume Growth 2016-2021

% volume growth	2020/21	2016-21 CAGR	2016/21 Total
- Cooking Fats	Data removed from sample		
- Butter			
- Margarine and Spreads			
Butter and Spreads			

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 4 Sales of Butter and Spreads by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
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- Cooking Fats
- Butter
- Margarine and Spreads
- Butter and Spreads

Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 5 NBO Company Shares of Butter and Spreads: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
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Data removed from sample

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 6 LBN Brand Shares of Butter and Spreads: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
-----------------------------------	---------------	------	------	------	------

Data removed from sample					
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Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 7 Distribution of Butter and Spreads by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
--------------------	------	------	------	------	------	------

Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						
--- Forecourt Retailers						
--- Hypermarkets						

- Supermarkets
- Traditional Grocery Retailers
- Food/drink/tobacco specialists
- Independent Small Grocers
- Other Grocery Retailers
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Other Foods Non-Grocery Specialists
- Mixed Retailers
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 8 Forecast Sales of Butter and Spreads by Category: Volume 2021-2026

'000 tonnes

	2021	2022	2023	2024	2025	2026
- Cooking Fats	Data removed from sample					
- Butter						
- Margarine and Spreads						
Butter and Spreads	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 9 Forecast Sales of Butter and Spreads by Category: Value 2021-2026

UZS billion

	2021	2022	2023	2024	2025	2026
- Cooking Fats	Data removed from sample					
- Butter						
- Margarine and Spreads						
Butter and Spreads	Data removed from sample					

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 10 Forecast Sales of Butter and Spreads by Category: % Volume Growth 2021-2026

% volume growth

	2021/22	2021-26 CAGR	2021/26 Total
- Cooking Fats	Data removed from sample		

- Butter
- Margarine and Spreads
- Butter and Spreads

Data removed from sample

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 11 Forecast Sales of Butter and Spreads by Category: % Value Growth 2021-2026

% constant value growth

2021/2022 2021-26 CAGR 2021/26 Total

- Cooking Fats
- Butter
- Margarine and Spreads
- Butter and Spreads

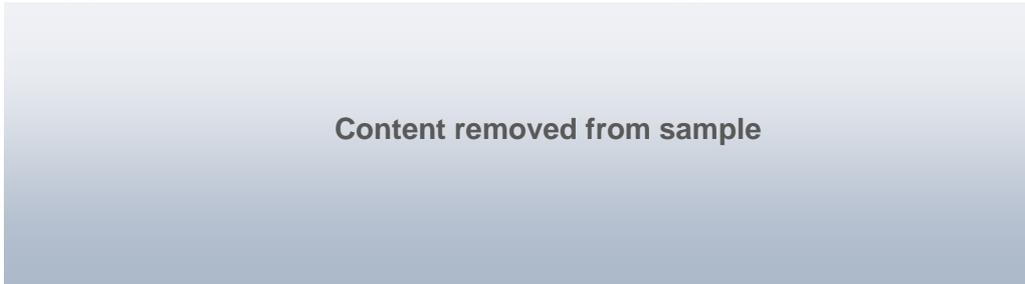
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Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

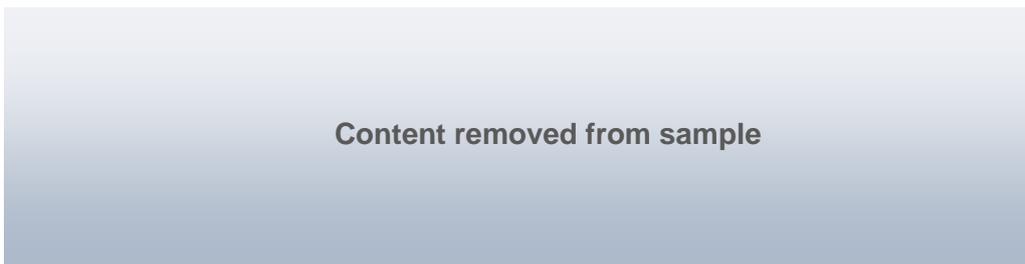
DAIRY PRODUCTS AND ALTERNATIVES IN UZBEKISTAN - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

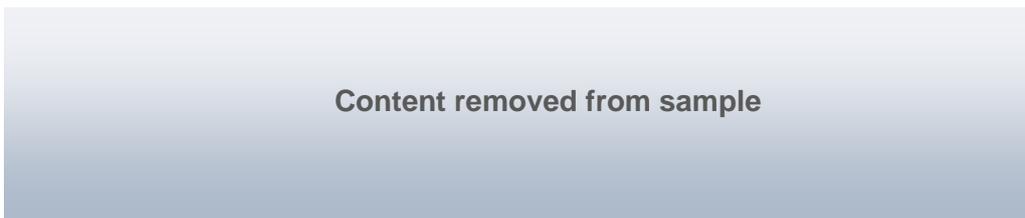
Dairy products and alternatives in 2021: The big picture



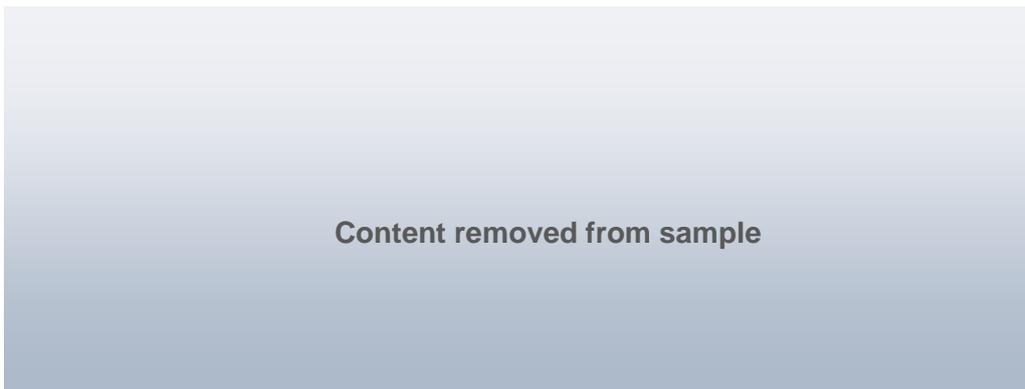
Key trends in 2021



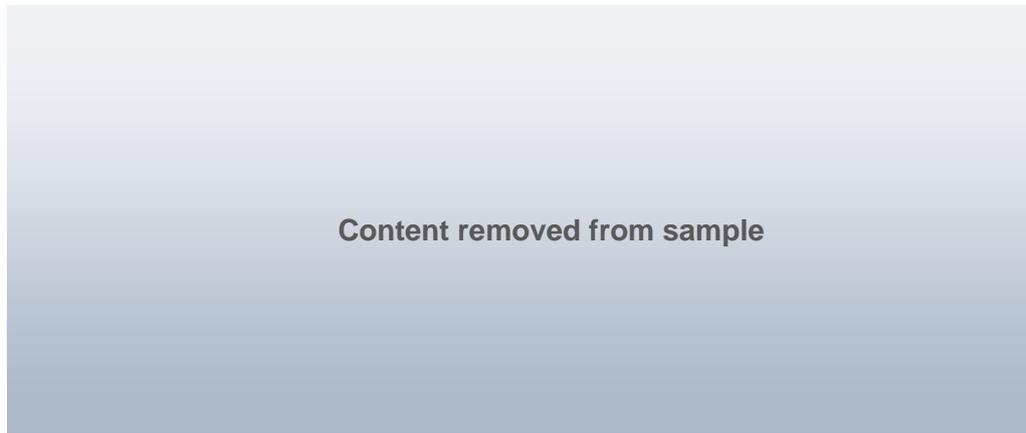
Competitive landscape



Channel developments



What next for dairy products and alternatives?



MARKET DATA

Table 12 Sales of Dairy Products and Alternatives by Category: Value 2016-2021

UZS billion	2016	2017	2018	2019	2020	2021
Dairy Dairy Products and Alternatives Baby Food	Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 13 Sales of Dairy Products and Alternatives by Category: % Value Growth 2016-2021

% current value growth	2020/21	2016-21 CAGR	2016/21 Total
Dairy Dairy Products and Alternatives Baby Food	Data removed from sample		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 14 NBO Company Shares of Dairy Products and Alternatives: % Value 2017-2021

% retail value rsp Company	2017	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 15 LBN Brand Shares of Dairy Products and Alternatives: % Value 2018-2021

% retail value rsp Brand (GBO)	Company (NBO)	2018	2019	2020	2021
Data removed from sample					

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 16 Distribution of Dairy Products and Alternatives by Format: % Value 2016-2021

% retail value rsp	2016	2017	2018	2019	2020	2021
Store-Based Retailing	Data removed from sample					
- Grocery Retailers						
-- Modern Grocery Retailers						
--- Convenience Stores						
--- Discounters						

- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Food/drink/tobacco specialists
- Independent Small Grocers
- Other Grocery Retailers
- Non-Grocery Specialists
- Health and Beauty Specialist Retailers
- Other Foods Non-Grocery Specialists
- Mixed Retailers
- Non-Store Retailing
- Vending
- Homeshopping
- E-Commerce
- Direct Selling
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 17 Forecast Sales of Dairy Products and Alternatives by Category: Value 2021-2026

UZS billion

2021 2022 2023 2024 2025 2026

Dairy
Dairy Products and Alternatives
Baby Food



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 18 Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2021-2026

% constant value growth

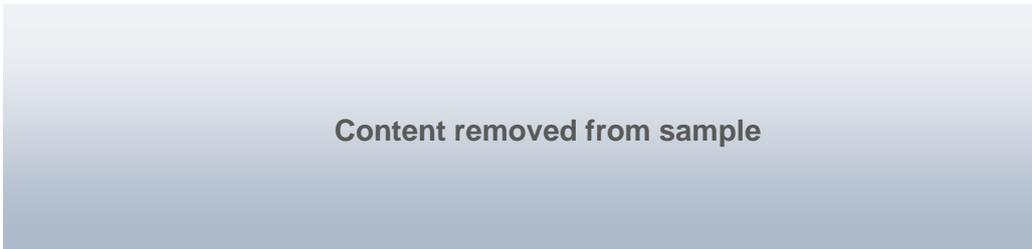
2021/2022 2021-26 CAGR 2021/26 Total

Dairy
Dairy Products and Alternatives
Baby Food



Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

DISCLAIMER



SOURCES

Sources used during research include the following:

Summary 1 Research Sources

