



Sweet Spreads in Ukraine

November 2025

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Sweet Spreads in Ukraine - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Modest recovery as affordability and comfort drive demand

INDUSTRY PERFORMANCE

Some marginal positive volume dynamics, value sales are mostly driven by inflation.

Rising fruit prices increase production costs

WHAT'S NEXT?

Honey and natural spreads expected to support gradual recovery

Health and naturalness to remain key long-term drivers

Premiumisation through craft jams and format diversification

COMPETITIVE LANDSCAPE

Ferrero maintains strong leadership through brand power

Local honey and private label offerings strengthen affordability segment

CHANNELS

Supermarkets retain dominance through convenience and trust

E-commerce expands as consumers embrace digital price comparison

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Cooking Ingredients and Meals in Ukraine - Industry Overview

EXECUTIVE SUMMARY

Economic stabilisation and consumer adaptation define performance

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Health-conscious choices remain important despite economic pressure

Local origin and patriotism shape purchasing behaviour

Consumers value trust, quality, and simple enjoyment

WHAT'S NEXT?

Gradual recovery expected as stability improves

Brands to focus on affordability, relevance, and younger audiences

E-commerce and convenience channels to gain traction

COMPETITIVE LANDSCAPE

Nestlé strengthens leadership through local investment and resilience

Domestic producers expand reach through affordability and availability

Private label gains momentum amid affordability focus

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Variety stores like Avro expand visibility for affordable products

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