



Processed Meat, Seafood and Alternatives To Meat in Ukraine

November 2025

Processed Meat, Seafood and Alternatives To Meat in Ukraine - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

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

Hamé Uk Tade TV enjoys strong growth in shelf-stable processed poultry

CHANNELS

Supermarkets provide access to shelf-stable, frozen and chilled options

Retail e-commerce is gaining ground

CATEGORY DATA

Table 1 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2020-2025

Table 2 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2020-2025

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Staple Foods in Ukraine - Industry Overview

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
Variety store Avrora expands the "one dollar store" format

MARKET DATA

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SOURCES

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