

Ukraine Food and Drink Report Q4 2015

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Abstracts

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BMI View: The outlook for Ukraine's economy has continued to deteriorate rapidly since the publication of our last Food & Drink quarterly. The economy continued its rapid implosion in the first quarter of 2015, contracting by 17.6% year-on-year. Our Country Risk team forecasts a recession of 7.2% in 2015 and growth of 0.6% in 2016. Like in 2014, recession in 2015 will be driven by the depreciation of the hryvnia and major trade disruption due to the risk of a military escalation with Russia, which remains high despite the ceasefire signed on February 12. Soaring inflation, substantially tighter government spending, diminished purchasing power and extremely tight credit conditions will also contribute to the dismal economic outlook. We forecast a sharp rise in food consumption in Ukraine in local currency terms, but this has been heavily impacted by inflation and currency depreciation.

Headline Industry Data (local currency)

2015 total food consumption sales growth: +35.2%; compound annual growth rate (CAGR) 2014 to 2019: +12.6%.

2015 per capita food consumption sales growth: +36.1%; CAGR to 2019: +13.3%.

2015 alcoholic drinks value sales growth: +3.7%; CAGR to 2019: +9.2%.

2015 soft drinks value sales growth: +41.7%; CAGR to 2019: +14.6%.

2015 mass grocery retail (MGR) sales growth: +46.7%; CAGR to 2019: +15.7%.

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