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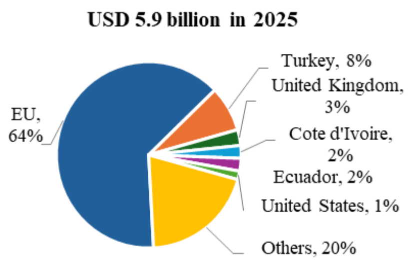
Report Highlights:

U.S. exports of consumer-oriented agricultural products increased by 14 percent in 2025 and continued to show solid growth in early 2026, though at a slower pace. Despite the Russia-Ukraine war, Ukraine's retail, food processing, and food service sectors are operating. The retail industry continues to offer a wide range of imported products. Imports of U.S. fish and seafood, nuts, food ingredients, whiskey, beer, snacks, wine, and pet food remain strong. After the economy, population, and imports contracted following the full-scale Russian invasion in 2022, the situation recovered, with imports returning to pre-war levels. Although the 2026 economic outlook is less optimistic due to increasing war-related burdens, consumer spending grew in the first quarter. The import environment for food and agricultural products is expected to remain dynamic until the conclusion of the war.

Executive Summary:
The Russia-Ukraine war has affected all sectors of Ukraine's economy. After a 29 percent drop following the full-scale Russian invasion in February 2022, the economy recovered by 5.5 percent in 2023 and 2.9 percent in 2024, with GDP growing to $191 billion in 2025. In 2026, the World Bank expects GDP growth to weaken to 1.2 percent. Although Ukraine's imports of food and agricultural products dropped by almost a third in 2022 to $6.3 billion, they rebounded to $9.1 billion in 2025. Imports from the United States also declined in 2022 to $191 million, but increased to $233 million in 2025. The EU is Ukraine's largest trading partner. Ukraine's major food and agricultural imports include tobacco, palm oil, pet food, wine, cheese, dairy products, fresh fruits, and miscellaneous food preparations.

Consumer-Oriented Agricultural Imports



Source: Trade Data Monitor

Food Retail Industry:
Ukraine's food retail sales grew by approximately 16 percent to $43 billion in 2025, driven by a slowdown in population outflows and the stabilization of disposable incomes. Ukrainian chains are well-established, possess significant market power, and offer a range of retail formats and service levels for consumers with varying incomes and preferences.

Food Processing Industry:
Ukraine's food processing output grew approximately 19 percent to $19 billion in 2025. Small and medium-sized enterprises dominate the market, with a few large processors responsible for the majority of sales in the beer, soft drinks, hard liquor, condiments, and confectionery sectors.

Food Service Industry:
The food service industry has suffered most significantly from the Russia-Ukraine war, with hotels and top-market-segment restaurants incurring the highest losses. The industry recovered quickly, growing at a 22 percent rate to $1.2 billion in 2025.

Quick Facts 2025

Imports of Consumer-Oriented Products
$5.9 billion

List of Top 10 Products that Have Seen Gains in 2025

1) Tree Nuts	**6) Confectionery Products**
2) Wine	**7) Fish and Seafood**
3) Condiments	**8) Distilled Spirits**
4) Bread and Pastry	**9) Food Ingredients**
5) Non-Alc. Beverages	**10) Beer**

Food Industry by Channels (USD billion) 2025

Retail Food Industry	$43 billion
Food Service-HRI	$1.2 billion
Food Processing	$19 billion
Food and Agriculture Exports	$24.3 billion

Top Ukrainian Retailers (by sales)

1. ATB	2. Fozzy Group
3. Metro Cash & Carry	4. Novus
5. Varus	6. Velmart
7. Auchan	8. Tavria V

GDP/Population
Population: ~30.0 million (FAS/Kyiv estimate); GDP *(billions USD)*: $185; GDP per capita *(USD)*: $6,167

Sources: World Bank; Trade Data Monitor; UkrStat.gov; Ukraine's Retailers Association; United Nations High Commissioner for Refugees

Strengths/Weaknesses/Opportunities/Threats

Strengths	***Weaknesses***
- Retail, food processing, and food service sectors are resilient - U.S. products are popular and viewed as high-quality - Per capita incomes are growing despite the war	- Population outflow has resulted in market shrinkage. - Attacks on critical infrastructure affect logistics and the cold chain
Opportunities	***Threats***
- After the initial shock, food imports, production, and consumption returned to growth in 2024 and 2025. - Ukraine's tech-savvy population and e-commerce platforms create new consumer access tools	- Russia-Ukraine war risks - U.S. exporters face competition from zero-import-duty products from the EU and Canada. - EU-approximated regulations limit market access for some U.S. products.

Section I: Market Overview

Although the Ukrainian economy has exhibited remarkable resilience, the immediate economic effects of Russia's 2022 full-scale invasion of Ukraine were very significant (Table 1). After a 29 percent drop in GDP in 2022, the economy rebounded by 5.3 percent in 2023, but only by an estimated 1.8 percent in 2025. Ukraine's recent performance weakened, as war-related spending depressed economic growth. In 2026, economic activity is concentrated in the mil-tech, agriculture, and service sectors, while other sectors are experiencing difficulties. The National Bank of Ukraine reported a year-over-year 0.6 percent drop in GDP in the first quarter of 2026. This dynamic was driven by power shortages as infrastructure suffered damage from Russia's massive strikes, low budget expenditures, delays in external financing, and abnormally cold weather. Post does not expect major drops in agricultural product imports, as GDP declines are traditionally weakly correlated with changes in purchasing power (Table 1). The macroeconomic outlook is also stable as Ukraine secured significant assistance from the EU in April 2026. The Ukrainian hryvnia stabilized after a large devaluation in 2022 and has remained stable following exchange rate liberalization in 2023, facilitating imports of agricultural and food products. Inflation in 2026 remains controlled, but high, at 8.2 percent year-over-year in May.

Due to population outflows resulting from the Russia-Ukraine war, Ukraine's consumer population decreased from 41 million pre-war to an estimated 30 million. Russia has hindered foreign trade by blocking ports in the Black and Azov Seas and attacking infrastructure and vessels. Direct foreign investment in Ukraine remains depressed due to war risks and currency repatriation concerns. Consumer spending is concentrated on necessities, but there are strong traditional markets for many American agricultural products, including seafood and beverages.

Table 1: Major Economic Indicators

INDICATORS	2019	2020	2021	2022	2023	2024	2025
GDP (%)	3.2%	-3.8%	3.4%	-29%	5.3%	2.9%	1.8%[1]
GDP per capita, PPP (USD)	14,218	15,541	17,846	14,770	17,665	18,551	19,380[2]
Inflation (%)	4.1%	5.0%	10.0%	26.6%	12.8%	12.0%[1]	12.9%[1]
Exchange Rate (Ukrainian hryvnia per dollar)	25.7	26.9	27.3	35.6	38.1	40.3	41.6
Total Imports from the United States (USD billions)	3.3	2.9	3.4	2.1	2.9	3.5	4.7

Sources: World Bank; National Bank of Ukraine; Ukraine's State Budget 2023; Trade Data Monitor
[1] *World Bank*
[2] *FAS/Kyiv estimate*

The food industry experienced a sharp drop due to falling consumer demand and other war-related factors, including logistics issues, after Russia's 2022 full-scale invasion of Ukraine, but quickly recovered. In 2025, demand for most staple and mid-priced food products recovered to pre-war levels. There continues to be strong demand for imports of tree nuts, fish and other seafood, beef, wine, beer, whiskey, and fresh, canned, and dried fruits. Demand for many high-end products remains sluggish.

Generally, lower-priced products and products with an optimal price/quality ratio will have a better sales outlook in all segments; however, quality requirements remain high, as the domestic industry competes with imports offering similar products at lower prices. U.S. suppliers should identify a niche market for their products and be prepared to compete with domestic suppliers and imports from the neighboring European Union (EU). Industry contacts expect Ukraine's retail market will continue to focus on cheaper products until the war ends, while the food processing industry will likely see increased demand for imported ingredients, as many are not produced domestically.

Ukraine's membership negotiations with the EU started in June 2024, with the first accession cluster opened in June 2025. Ukraine continues to implement regulatory reforms and has achieved some progress. Upon full membership, all import regulations should be fully compliant with those of the EU. Although new rules have made trade more transparent, the EU-like regulations have, in some cases, restricted market access for U.S. products. Following the full-scale Russian invasion, new EU transit requirements came into force, as the only viable trade routes were through the EU. This required all exports to be compliant with EU transit rules, even when Ukrainian import regulations were less restrictive.

Population and Key Demographic Trends

Russia's 2022 full-scale invasion of Ukraine precipitated the largest migration crisis in Europe since World War II. Close to 15 percent of the prewar population of 41.3 million (5.9 million refugees and migrants) fled Ukraine, with another 3 percent (almost 1.2 million) remaining in Russia-occupied territory. Women and children are the core of the displaced population, as border crossing for the majority of men aged 23-60 is restricted due to martial law. Around 6.0 million people are internally displaced, mainly settling in the central and western areas of Ukraine. The war has affected consumption for different groups in different ways. Employment for displaced people can be difficult, and the corresponding income losses have directly impacted consumption patterns. Many consumers maintain their consumption levels by using savings, which may be unsustainable in the long term.

Pre-2022, a large number of Ukrainians (2.5-3.0 million) were employed abroad, and remittances were an important part of GDP (10.4 percent or $12.2 billion in 2022), fueling consumer demand. Remittances dropped to $7.9 billion in 2025 and continue to fall.

After a sharp drop in income in the first half of 2022, per capita disposable income grew strongly and recovered to pre-war levels in 2023. Increased social transfers, military salaries, and the growth of war-related sectors contributed to this growth. However, many economic drivers weakened by 2026, prompting a slowdown in consumer spending.

Table 2: Advantages and Challenges Facing U.S. Products in Ukraine

Advantages	Challenges
U.S. products are perceived as quality, high-end, unique products. Ukrainians have a positive attitude toward the United States.	Population outflow has resulted in market shrinkage. A decrease in consumer disposable income, high inflation, and unemployment of internally displaced people have led to a structural shift in consumption toward cheaper products.
Recent improved trade regulations, accompanied by anti-corruption efforts and a single window for importers, have simplified some customs procedures.	Arbitrary customs valuation practices can make importing food costly and complex.

Retail chains aim to diversify their supplier base to maintain product assortment and a predictable supply of goods.	There is strong competition in the local market from domestic producers and increasing imports from the EU. Consumers tend to buy more "made in Ukraine" products, especially since the start of the Russia-Ukraine war.
The average import tariff level for consumer-oriented and processed food products is low.	The Ukrainian regulatory framework, based on EU regulations, limits imports. Transit through the EU has become the only viable route for food imports, thereby subjecting all imported products to EU transit regulations.
Presence of international fast food and franchising restaurant chains in Ukraine that use standard procurement systems and source some food ingredients from the United States	Trade and logistics risks due to the Russia-Ukraine war. High distribution and shipping costs, logistics constraints, and long delivery timelines resulting from blocked ports and closed airspace
The retail sector is trying to maintain its U.S. assortment, and in some cases, widen it, despite the economic situation.	Electricity outages resulting from energy infrastructure attacks have adversely affected retail, food processing, and food service operations.

Section II: Exporter Business Tips

Local Business Customs

Nearly all U.S. food and agricultural exporters work through Ukraine-based subsidiaries, importers, or buyers. Due to frequent changes in Ukrainian legislation, customs clearance rules, and sanitary, phytosanitary, and veterinary procedures, importers are typically responsible for the entire logistical chain and inland transportation. Imports by air are currently restricted, as Ukrainian airspace is closed. Imports by sea remain hindered, while rail and road imports through western Ukraine are more viable and cost-effective.

Retailers possess significant market power. Mass-market products have a smaller chance of attracting an importer's attention than unique products. Larger Ukrainian retail chains have very efficient product selection strategies. Many chains do not work with independent distributors; instead, they have their own import departments that work directly with suppliers. They may start importing through a distributor, then later refuse distributor service and shift to direct imports if sales potential appears good. Independent importers supply niche and new-to-market products with higher market risk. Independent distributors often face high shelving and marketing fees. Large national retailers are also effective at developing private labels. Some retailers maintain multiple private-label lines spanning low-, mid-, and high-tier price categories. Importers may face unfavorable payment terms, with payment due 60 or even 90 days after the product sale, which increases import costs and currency exchange risks.

General Consumer Tastes and Trends

While there are branches of international research companies that can provide paid, ad hoc research, and some Ukrainian retailers have very sophisticated consumer data through their loyalty programs, Ukrainian market research for specific product groups can be difficult to access. Ukraine does not have large food trade shows.

Consumer preferences differ significantly across various incomes and age groups. Younger consumers tend to experiment with new products, but this often does not convert to long-term sales. Middle-aged and elderly consumers often treat new products with caution. Consumers of all ages and income groups are highly patriotic in their choices and usually prefer domestic brands over imported ones, a trend that has strengthened since the full-scale Russian invasion.

Geographic proximity to the EU influences Ukrainian consumer preferences. Ukrainian tourism in the EU, combined with the growing popularity of European cuisines, creates consumer demand. There are small convenience stores that carry only imported EU products, mostly in western Ukraine. At the start of the full-scale Russian invasion, many chains increased imports of substitutes for some domestically produced products (i.e., salt, baking powder, candies, pasta) from neighboring countries due to disrupted logistics and damaged infrastructure. Consumers recognize some foreign and well-established local geographical indications.

Ukrainians are familiar with organic products, but the term is often associated with, or understood as, products produced by small farmers or households. Consumers are familiar with the EU's Green Leaf logo, and it is officially accepted as equivalent to Ukraine's organic certification. USDA organic certification is not officially recognized, but can be found in some stores, properly placed on organic shelves. The concept of regional and local production is not popular in Ukraine; however, some upscale retail chains and restaurants promote local farms and companies.

The trend toward a health-conscious diet is emerging, mainly in urban areas and among high-income consumers, and Ukrainian consumers are paying more attention to the nutritional value of food products.

Section III: Import Food Standards & Regulations/Import Procedures

FAS/Kyiv's Food and Agricultural Import Regulations and Standards (FAIRS) Country Report provides a detailed overview of Ukraine's import regulations. The report contains multiple links to specific FAIRS reports that explain import controls, labeling, place of origin, packaging, maximum residue levels for microbiological, radiological, and other contaminants, food additives, geographic indicators, health and nutritional claims, organic and novel foods requirements, sample shipments, and import inspection procedures.

Customs Clearance

Imported products will not be granted clearance until all requirements are met. In 2018, Ukraine implemented a single window customs clearance system that allows for one-point document submission. For food safety clearances, an importer must submit a bill of lading for all products, an original shipment document, an original international certificate (veterinary or phytosanitary certificate when applicable), and a properly completed product entry document (Common Veterinary Entry Document for products accompanied by veterinary certificates or Common Entry Document for all other food products). Exporters should confirm the complete requirements of the customs clearance package with their importer. Ukrainian is the only official language. All documents must be bilingual, submitted in Ukrainian, or accompanied by an official translation. Originals of all accompanying documents must be presented to the appropriate competent authorities before customs clearance of the product.

Ukraine resumed enforcement of all laws and regulations governing commercial imports of food products, live animals, reproductive materials, seeds, and feed on April 10, 2025. The Government of Ukraine suspended enforcement of these laws and regulations at the start of the full-scale Russian invasion in February 2022. Therefore, importers are expected to follow all official import procedures.

Documents Generally Required by the Country Authority for Imported Food

All products of animal origin and seafood need to be accompanied by a bilateral health certificate, without exception. Detailed certification requirements by HS Code are listed in a separate GAIN report. For U.S. products, please refer to the USDA FSIS Export Library for specific products that can be exported to Ukraine. For the list of HS headings that require international certificates, refer to the FAIRS Certificate Report. Processed food products imported into the customs territory of Ukraine must be accompanied by an "international certificate or another document issued by the exporting country's competent authority."

Tariffs and Free Trade Agreements (FTAs)

Ukraine has been modifying its food safety regulations to align with European regulatory norms since the signing of the Deep and Comprehensive Free Trade Area Agreement (now part of the Association Agreement between the European Union and Ukraine), which imposed additional compliance obligations in 2014. Several Ukrainian laws and regulations implemented after the DCFTA's adoption declared Ukraine's adherence to both "international and/or EU norms." Many U.S. products require bilateral certificates, which have been negotiated with Ukraine for market access. Ukrainian import duties are generally low, but many trading partners, including EU member states, the United Kingdom (UK), Canada, Georgia, EFTA (Switzerland, Norway, Iceland, and Liechtenstein), Moldova, North Macedonia and Montenegro (active FTA for specific industrial and agricultural goods), Azerbaijan, Uzbekistan, Tajikistan, Turkmenistan, and Türkiye, benefit from reduced import duties or zero-tariff rate quotas under respective FTAs. Many FTAs signed with ex-Soviet Union countries are basic and contain multiple exemptions.

After the war began, the EU and UK abolished their import duties and tariff rate quotas (TRQs). The EU quickly restored most of the duties and TRQs established under its FTA, while the UK plans to restore TRQs in 2027. Selected EU member states maintain bans on multiple Ukrainian agricultural products, in violation of their FTA.

Section IV: Market Sector Structure and Trends

Retail Sector

Please refer to the detailed 2026 Retail Foods GAIN Report for more information. Market share of organized retail trade, including supermarkets and convenience stores, exceeds 70 percent of Ukraine's domestic market. Small, family-owned shops account for over 20 percent, while open-air markets account for less than 7 percent, although their role in sales of raw pork, beef, and traditional dairy products remains significant. E-commerce is an emerging channel for food shopping. Historically, consumers have bought more non-food items than food products online; however, in big cities, consumers use grocery delivery services, including those offered directly by retail chains, more often. The majority of online stores offer only heat-treated, shelf-stable products.

The Ukrainian food retail market displayed steady growth in 2025, led by regional chains and convenience store formats. Discount retailers and convenience stores showed the highest growth rates. A trend toward smaller convenience stores accelerated in recent years, with small-store formats and local chains regaining market share. The size of Ukrainian households is shrinking, and lower-middle- and middle-income Ukrainian consumers are choosing to shop at local convenience stores to save time and money on fuel. Big supermarkets and hypermarkets, benefiting from economies of scale, maintain their share as weekend shopping destinations.

The war has heavily influenced retail geography. Most new stores are opening in the western regions, benefiting from distance to the front line and increased consumer demand driven by population migration. Kyiv and its surrounding areas remained attractive, accounting for over one-third of new openings, thanks to the city's economic significance and dense population.

High rents and utility bills, substantial supply chain disruptions, and prolonged electricity outages are among the main negative factors currently affecting retail operations. Retailers are forced to find alternative energy sources, such as generators, to maintain the necessary storage conditions, especially for fresh products.

Seafood, fresh and processed fruits, cheese, alcoholic beverages, coffee, and confectionery are the categories with the largest shares of imported products. Despite the Russia-Ukraine war, the retail sector provides the best sales opportunities for U.S. exports, due to stagnation in other sectors.

Food Processing Sector

In 2025, the Ukrainian food processing industry accounted for approximately 40 percent of total manufacturing and almost 8 percent of country's GDP. While the industry relies heavily on small and medium-sized enterprises, a few large processors are responsible for the majority of sales. These large processors specifically dominate in the beer, soft drinks, hard liquors, condiments, and confectionery sectors. Ukraine also has well-developed dairy and poultry sectors. Due to Russia's 2022 full-scale invasion of Ukraine and the corresponding contraction in manufacturing, imports of intermediate agricultural products declined by almost 30 percent in 2022 and 2023, but strongly rebounded with 14 percent growth in 2024 and 15 percent in 2025.

Hotel, Restaurant, Institutional (HRI) Sector

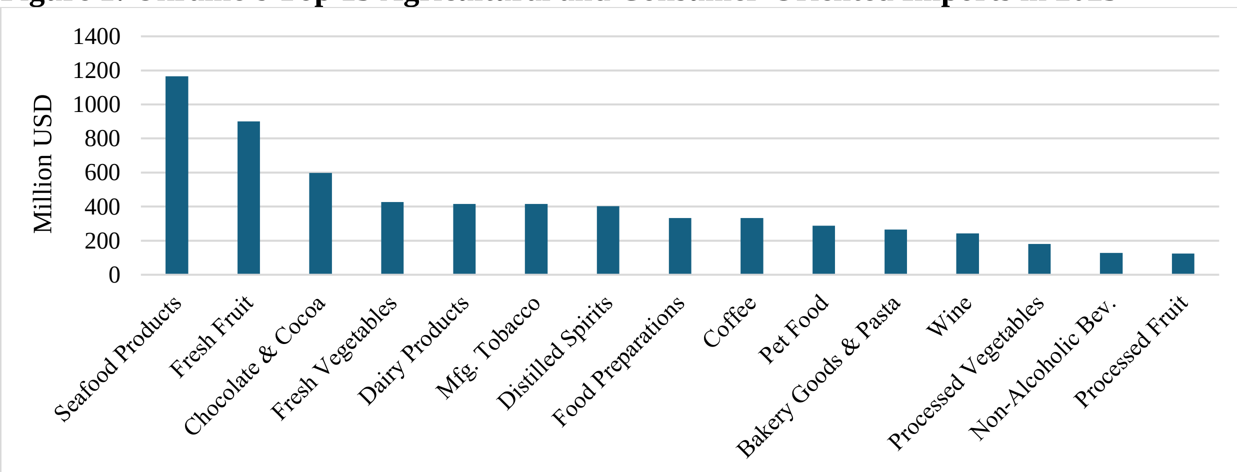
The HRI sector accounts for nearly 3 percent of total service industry turnover. At the start of the Russia-Ukraine war, many international food service chains suspended their operations but gradually resumed them within a few months. The state institutional sector is a significant consumer of food products. Schools, hospitals, the military, state penitentiaries, and other government institutions must follow Ukraine's common procurement guidelines (Prozorro). The use of the new centralized, more transparent procurement system significantly simplifies access to this market.

International tourist arrivals to Ukraine have largely stopped due to the Russia-Ukraine war. Domestic tourism is still in place, mainly focusing on cheaper formats. Economic and energy stability are key challenges for the HRI sector. Establishments with generators have greater potential to increase sales; however, generator costs are much higher, which affects long-term income and prices.

Section V: Agricultural and Food Imports

Being one of the world's largest agricultural producers, Ukraine predominantly imports food products that cannot be produced domestically for climatic or geographical reasons (tropical fruits, seafood, coffee, tea), sophisticated products for which domestic producers have little production competency (wine, pet food), or products complementing strong domestic production (dairy products, beer) (Figure 1).

Figure 1: Ukraine's Top 15 Agricultural and Consumer-Oriented Imports in 2025



Source: Trade Data Monitor
Note: Total 2025 agricultural and consumer-oriented imports were $9.5 billion

Best Product Prospects

Ukraine imports many products from the United States, such as frozen fish and seafood, nuts, cereals, snacks, beef, food ingredients, and other prepared food products. Purchases of hake and Alaska pollock have grown over time as lower-priced fish options for retail and food service. U.S. pet food exports will gain momentum, benefiting from more relaxed and updated certification requirements. Some products sold in small quantities will likely have substantial sales potential as Ukraine's economy recovers.

Demand for "healthy," "organic," and "natural" foods, as well as for products that target specific health issues, such as diabetes or gluten-free products, is strong in large urban areas. Likewise, demand for vegetarian and vegan products is growing. Before 2022, sales of high-quality and high-end food products were increasing. Seafood, high-end alcoholic beverages, and high-quality beef also have long-term sales potential (Table 3). U.S. processed foods, wine, and beverages have a target audience and potential for future expansion.

Table 3: Best High-Value, Consumer-Oriented Product Prospects Categories*

In the market and have good sales potential	Not present in significant quantities, but which have good sales potential	Not present because they face significant barriers
• Fish and seafood, especially salmon roe, hake, and Alaska pollock • Wine • Nuts • Dried fruits (cranberries) • Alcohol (whiskey, beer) • Snacks • Pet food • Nuts • Carbonated soft drinks • Vegan and vegetarian products	• Premium dessert products, such as chocolate bars and cookies • Sauces • Organic food • Gluten-free products • Plant-based proteins • Pomegranates	• Cheese and ice cream, due to difficulties with logistics, which increases prices • Fresh fruits/vegetables, due to strong competition from the EU, Türkiye, and Georgia • No genetically engineered varieties are registered for food or feed use in Ukraine

* Includes products with the highest growth rate in the last five years

Section VI: Key Contacts and Further Information

Agricultural Affairs Office Kyiv 4 Igor Sikorsky Str., Kyiv 04112 Ukraine http://www.fas.usda.gov www.smachnousa.com.ua	Phone: +38-044-521-5036 Email: agkyiv@usda.gov

Links to Key Resources:

Ukraine Import Tariffs
Ukraine: Country Commercial Guide by the U.S. Foreign Commercial Service

Ukraine Food and Agriculture Data Sources
State Statistics Service of Ukraine

Entities Responsible for Policy Development
Ministry of Economy, Environment and Agriculture of Ukraine

Ukraine’s Single Food Safety Authority
State Service of Ukraine on Food Safety and Consumer Protection

Other Useful Contacts
Association of Retailers of Ukraine
American Chamber of Commerce Ukraine
Association of Fish Importers of Ukraine
Meat Industry Association of Ukraine
Ukrainian Chamber of Commerce and Industry

Attachments: Ukraine's Imports of Agricultural and Related Prodcuts from the United States.docx