



DOING BUSINESS IN UKRAINE

Population 29 mil | GDP Growth 5,2% | Wine Imports \$142mil
Ukraine is increasingly viewed as the industrial and agritech engine of Eastern Europe, with the new U.S.–Ukraine Reconstruction Investment Fund drawing multinationals back to Kyiv and Lviv as springboards for regional operations. In Kyiv and Lviv dining scene is bouncing back, there is a growing interest in Ukrainian and other origin natural \ bio craft wines although it remains a niche. Market is price sensitive yet wine consumers are open to discover new styles, grapes, regions.

Wine in Ukraine

Consumption of Wine

Consumption of wine per capita slightly decreased the last year and is around 2,1l. Mainly wine is consumed at home (70%), when going to friend's home (48%), then comes HoReCa (17%). Supermarkets and specialized shops have the biggest share in wine sales (81%). Sparkling wine is a growing category led with Prosecco. On-line sales show the growth of premium segment (above 15\$ RSP) while in retail entry - middle segment (3\$ to 8\$ RSP) is prevailing. In HoReCa there is a trend of selling sparkling wines from kegs (Italian origin).

Consumption Trends

Ukrainian produced wines make about 50% of the total market mainly in low price segment. For the last decade Italy has the biggest share of imported wines in volume both still and sparkling (40%), followed by Spain (18%), France (12%), Georgia (8%), Portugal and Germany (5% each). The most imported varieties are Pinot Grigio, Sauvignon Blanc, Chardonnay, Airen, Glera (Prosecco) for whites; Cabernet Sauvignon, Merlot, Shiraz, Tempranillo, Pinot Noir for reds. There is a niche but growing trend for natural wines both in import and local production. Although USA wines have 0,4% share in the wine import there is a high recognition of quality. Around 90% of US imported wines are bottled in EU, reds are mainly of ripe, fruity style. Zinfandel is the leader and there is a growing demand for White Zinfandel.

Trading Notes for Wineries

Importers and Traders

There is a strong trend for retail chains to have their own direct import and thus to keep more approachable prices for consumers. Classic distribution of wine is decreasing as a channel except for brands. The cost of import license is low (20\$ per year) making it affordable for small players. The wholesale license instead is expensive (16500\$ per year). The importers started to open and develop own chains of specialized shops and on-line stores. Marketplaces are growing fast and open their off-line collection points selling alcohol. High end HoReCa is present mainly in Kyiv and Lviv, major growing segment is coffee-shops and casual formats.

Brands and Wine Preferences

The Ukrainian wine drinkers prefer the known countries, regions, grape varieties, but are not ready to pay higher price for branded wines except in premium segment. White wines are 50% of the market with lighter, aromatic, fruity profile. Reds are about 40% and are decreasing, preferred style: less oaky, more fruity, savory, slightly sweet. Rose is about 10%, light sweetness works better (up to 6 g\l)

Market Insights

- Most of the premium wines are consumed in Kyiv and Lviv, Western regions are growing steadily.
- People in Kyiv and Lviv like to visit off-line wine events, are open to taste different wines.
- Sparkling category is growing both in low-middle price (Prosecco) and high (Champagne)
- In the premium wine category people more often look for organic, biodynamic, natural, sustainable wines.
- Vivino rating is very important especially for the wines above 10\$ RSP
- EU place of loading gives more opportunities for wines above 10\$ to enter the market
- Major part of US wines on the market are those bottled in EU with ExW EU below 4\$

Notable Importers

- Wine Bureau (premium segment incl.)
- Wine Hall
- Fozzy Group (Silpo) (premium segment incl.)
- Novus (premium segment incl.)
- METRO
- TS Plus (premium segment incl.)
- Wine Hunters
- Bayadera Logistic (premium segment incl.)
- ATB
- Rozetka
- Winemart (premium only)
- Cuvee (premium only)

Taxes, Shipping and Terms

- There is a customs duty for all non-EU wines of 0,3 Euro per liter of wine.
- VAT is 20% and 5% of excise duty is paid by the seller based on the retail price.
- Excise duty and stamps:
 - still wine below 15% - duty 0,01 UAH for liter \ no paper stamps
 - still wines above 15%, fortified wines & vermouth – 8,02 UAH for liter \ stamps required
 - sparkling wines – 11,65 UAH for liter \ stamps required for the wines above 8,5%
- Tax stamps should be put before the wine crosses the border either by producer or in the bonded warehouse the importer works with.
- The list of documents to be provided: invoice, Certificate of Origin, certificate of analysis and health, packing list, CMR, export declaration. The final list and form TBC by each importer.
- New rule to be implemented the next year: paper stamps stop being issued on 18 Oct 2025 and are replaced by DataMatrix e-Aktsyz codes on 1 Jan 2026.
- Additional sticker or Ukrainian text on the back label is required. TBC with importer
- There is no COFACE or alike coverage of Ukrainian companies right now, so importers are ready to pay upfront. And major part of them asks for the possibility to load wines from Europe to decrease the lead-time.
- Direct shipments to Ukraine are very limited now, importers use other EU ports.
- Taking into the consideration the average logistic costs and all other payments, the retail sales price of the 10 USD wine ExW CA will be 30 USD getting up to 50-70 USD in HoReCa depending on the segment.

Ukraine Potential Market Size, 9lt cases	
Price Segment*	Volume per Year
\$1-\$3	Multiple Containers
\$3-\$5	6 000 – 12 000
\$5-\$10	1 200 – 2 400
\$10-\$20	1 200
\$20-\$50	250 - 500
\$50+	50 – 100

*based on ex-cellars pricing

