

MARKET RESEARCH OF THE UKRAINIAN DAIRY INDUSTRY MARKET

МАРКЕТИНГОВЕ ДОСЛІДЖЕННЯ РИНКУ МОЛОЧНОЇ ПРОДУКЦІЇ УКРАЇНИ

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An analysis of the current business environment and marketing tools leads to the conclusion that the development of domestic production of goods or services largely depends on the strategic orientation of business in the current economic environment. Providing the population of Ukraine with quality food products, expanding their range and reducing food dependence on imports is an urgent problem today. Market research is a guideline for companies to formulate their marketing strategies and product development. It also helps to identify trends in consumer behavior, such as changes in preferences for organic products, sustainable production, or increased demand for alternatives to traditional dairy products, and to take measures to attract new consumers. The use of market research tools in a company's operations will help it better understand its place in the market, evaluate the effectiveness of marketing campaigns, and identify ways to improve competitiveness.

Keywords: dairy industry of Ukraine, market research.

Аналіз сучасних умов господарської діяльності та маркетингових інструментів дозволяє зробити висновок, що розвиток вітчизняного виробництва товарів чи послуг значною мірою залежить від стратегічної орієнтації бізнесу в поточних економічних умовах. Забезпечення населення України якісними продуктами харчування, розширення їх асортименту та зниження продовольчої залежності від імпорту є актуальною проблемою сьогодення. Складна економічна ситуація на українському ринку в умовах європейської інтеграції змушують вітчизняних суб'єктів господарювання шукати нові ефективні технології розвитку та підвищення конкурентоспроможності молочної продукції. Одним із таких інструментів є маркетингові дослідження, спрямовані на вивчення ринку молочної продукції, прогнозування попиту, аналіз ринкових сегментів, та досягнення конкурентних переваг через диференціацію товару, що лежить в основі розробки стратегії розвитку. Метою статті є систематизація теоретичних та практичних підходів до дослідження ринку молочної продукції України. Мета досягається шляхом розв'язання таких завдань: розкрити сутності досліджень ринку молочної продукції, об'єднати їх важливість та визначити нагальні проблеми; представити загальний підхід до складання плану та визначення стратегій, методології досліджень ринку молочної продукції; проведення аналізу ситуації та динаміки ринку, дослідження різних сегментів ринку молочної продукції. Проведено аналіз попиту на молочні продукти виявили зміни в споживчих уподобаннях та попиті на різні типи продукції, такі як молоко, йогурт, сир. Проведені маркетингові дослідження є орієнтованими для компанії, щодо формування їх маркетингових стратегій і розвитку продукту. Також, дозволяють визначити тенденції у поведінці споживачів, таких як зміни в уподобаннях щодо органічних продуктів, стійкого виробництва або збільшення попиту на альтернативи традиційним молочним продуктам та жити заходів, щодо залучення нових споживачів. Застосування інструментів маркетингового дослідження у діяльності компанії надасть можливість краще зрозуміти своє місце на ринку, оцінити ефективність маркетингових кампаній та визначити шляхи підвищення конкурентоспроможності.

Ключові слова: молочна промисловість України, маркетингові дослідження.

Statement of the problem. Marketing research is a complete process of collecting information and a set of necessary tools for solving marketing problems. This process allows you to better understand the market situation in order to gain competitive advantages.

An analysis of current business conditions and marketing tools shows that the development of domestic dairy production largely depends on the strategic orientation of business in the current economic environment.

The difficult economic situation on the Ukrainian market in the context of European integration forces domestic business entities to look for new effective technologies for developing and improving the competitiveness of dairy products. One of these tools is market research aimed at studying the dairy market, forecasting demand, analyzing market segments, and achieving competitive advantages through product differentiation, which is the basis for developing a development strategy.

Analysis of recent research and publications.

The works of Cluley R., Green Z. and Owen R. state that in today's digital environment, the role of the

marketer-researcher is changing and this is a natural result of the rapid evolution of marketing and the availability of large amounts of data. It is important to continuously learn and adapt to the rapidly changing marketing environment in order to use digital technologies to benefit your company and customers [1; 2].

Scientists Busca L. and Bertrandias L. presented a comprehensive framework for marketing research based on a historical analysis of the development of the Internet and the identification of four cultural epochs. The main epochs that are distinguished, such as collaboration systems, traditional market systems, co-creation systems, and assumption market systems, reflect important moments in the development of Internet culture [1; 3].

Researcher A. Azoyan notes that SEO website optimization plays an important role in modern marketing research, especially when it comes to collecting and analyzing data from the Internet. Website optimization helps to improve website visibility in search engines, increase traffic and attract targeted traffic. This, in turn, makes it possible to obtain more data for further marketing research [1; 4].

Scientists M. Oklander, T. Oklander, and O. Yashkina note that online research on the Internet has become very popular in modern marketing for a number of reasons, including accessibility, efficiency, and the ability to quickly process and analyze data [1; 5].

Researchers Aretenko V. and Aretenko T. emphasize that Social Media Marketing (SMM) is an important component of modern marketing strategies. This area of marketing is aimed at using social media platforms such as Facebook, Instagram, Twitter, LinkedIn, YouTube and others to achieve marketing goals and interact with the audience [1; 6].

The purpose of the article. The purpose of this paper is to systematize theoretical and practical approaches to the study of the Ukrainian dairy market. To this end, the following tasks were formulated and solved:

- to disclose the essence of dairy market research, justify its importance and define its objectives;
- to present a general approach to planning and defining strategies and methodologies for dairy market research;
- analyzing the market situation and dynamics, researching various segments of the dairy market.

Thus, according to the analysis of recent publications, the Internet and digital media have significantly changed the approach to marketing and expanded the opportunities for collecting and analyzing market and consumer data. Therefore, when conducting marketing research, the use of modern Internet technologies is of great importance for practicing marketers and researchers.

Presentation of the main research material.

A study of the global market for milk and dairy products shows a rapidly growing demand for them. This stimulates the development and modernization of dairy production around the world, as efficient and sustainable dairy production is essential to feed the world's growing population.

The competitiveness of dairy processing enterprises and the overall development of production largely depend on the formation of demand for their products, which is determined by the level of consumption. The study showed that milk consumption per capita per year has decreased in recent years. The difference in the consumption of milk and dairy products in different regions of Ukraine is noticeable, due to economic, demographic and marketing factors. Economic factors, such as purchasing power and income, can affect the affordability of dairy products. Demographic factors, such as the ratio of urban to rural population, also play an important role in consumer habits. Marketing factors, such as the quality and price of products, can influence their popularity.

The decline in dairy consumption may also be due to the spread of healthy eating trends, where plant-based milk is becoming an alternative to animal milk.

This indicates a change in consumer preferences and conscious consumer choice [7]. Such trends are indeed driven by consumer concerns about the presence of hormone and antibiotic residues in finished products, as well as unfavorable lactose intake and milk allergies among certain segments of the population.

However, the decline in per capita consumption of milk and dairy products has not led to a shortage of milk on the domestic market. This is due to the decline in the population in the country in recent years, which in turn affects the reduction in the consumption of dairy products.

Despite this, household spending on dairy products remains significant, accounting for approximately 15 % of total food expenditures. This makes dairy products the fourth most important area of nutrition, after spending on bakery, meat, and flour products [8].

The rise in prices for finished dairy products has indeed had a significant impact on consumption. At the beginning of 2020, prices for dairy products in Ukraine were the highest in Europe, which can be partly explained by the high VAT rate on these products (20 %), compared to EU countries with rates ranging from 5 % to 7 %, such as Poland, France, Germany, and others. In addition, in recent years, there has been an increase in prices for dairy products on store shelves of up to 15 %. These price increases may be the result of various factors, including rising production costs, increased tax burden, inflation, and changes in production processes. Higher prices can play an important role in consumers' decision to purchase dairy products, especially when there are alternatives on the market [9]. Also, there is a significant decrease in the number of cows, which may be one of the key reasons for the rise in dairy prices. Such trends can be a serious challenge for dairy companies and consumers, and will require comprehensive measures to address the problem [10].

To analyze market conditions, it is important to consider the dynamics of market development over several years. Due to military operations, shelling and occupation, Ukraine has lost some of its enterprises. In the dairy industry, two-thirds of the production facilities are currently operating intact [11].

Exports of dairy products helped to maintain and increase milk prices, which was the case until November 2022. However, after that, the market stopped and went into a sideways trend, which was typical until January 2023. This was the result of several factors, including:

- lower prices for finished products on the global market and, accordingly, export volumes of domestic dairy products;
- shortage of milk on the market due to seasonal decline in volumes and large losses as a result of the war.

The constant energy pressure from Russia has forced producers and processors to look for alternative sources of electricity, mainly diesel generators, which has significantly increased the cost of raw materials and finished products.

The analysis of economic indicators of the Ukrainian dairy industry market is presented in Table 1.

Analyzing Table 1, we can see that the production of the dairy industry decreased from 2018 to 2022, namely in 2018 (164 thousand tons), in 2020 – 9267.4 thousand tons, in 2022 – 7767.7 thousand tons. In 2023, there is an increase in dairy production – 7931.2 thousand tons. Exports of the dairy industry are fluctuating, namely: from 2018 to 2020, there was a decrease in this indicator from 807 thousand UAH (2018) to 691 thousand tons (2020). In 2021, the

export of the dairy industry increased and amounted to thousand tons. In 2022, with the outbreak of the war, dairy exports decreased to 341 thousand tons. In 2023, the situation stabilized and exports began to grow by 369 thousand tons. From 2018 to 2020, there was an increase in imports of dairy products: 2018 (180 thousand tons), 2020 (440 thousand tons). From 2021 to 2023, there is a decrease in imports of dairy products from 369 thousand tons (2021) to 243 thousand tons. In 2023, the market capacity amounted to 8543.2 thousand tons. The production growth rate was 2.10 %. The export growth rate was 8.21 %. The import growth rate is 7.60 %.

Let's conduct a study of market conditions and analyze the capacity of the dairy industry market segments for the period 2018–2023 (Table 2).

Table 1

Key economic indicators of the dairy industry market in 2018–2023

| Indicators | Years | | | | | |
|---------------------------------|---------|--------|---------|--------|--------|--------|
| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
| Production, thousand tons | 10064.0 | 9697.0 | 9267.4 | 8728.8 | 7767.7 | 7931.2 |
| Exports, thousand tons | 807 | 593 | 691 | 781 | 341 | 369 |
| Imports, thousand tons | 180 | 337 | 440 | 369 | 263 | 243 |
| Market capacity, thousand tons. | 11051 | 10627 | 10398.4 | 9878.8 | 8371.7 | 8543.2 |
| Production growth rate, % | – | –3.65 | –4.43 | –5.81 | –11.01 | 2.10 |
| Export growth rate, %. | – | –26.52 | 16.53 | 13.02 | –56.34 | 8.21 |
| Imports growth rate, %. | – | 87.22 | 30.56 | –16.14 | –28.73 | –7.60 |

Source: compiled by the authors based on [12; 13]

Table 2

Capacity of dairy industry market segments in 2018–2023

| Indicators | Years | | | | | |
|---------------------------------|---------|---------|---------|---------|---------|---------|
| | 2018 | 2019 | 2020 | 2021 | 2022 | 2023 |
| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
| Condensed milk and cream | | | | | | |
| Production, thousand tons | 4327.52 | 4412.14 | 4170.33 | 3753.38 | 3223.60 | 3489.73 |
| Exports, thousand tons | 330.87 | 254.99 | 306.11 | 339.74 | 143.22 | 158.67 |
| Imports, thousand tons | 81.00 | 146.60 | 198.44 | 161.62 | 118.35 | 108.38 |
| Market capacity, thousand tons. | 4739.39 | 4813.73 | 4674.88 | 4254.74 | 3485.17 | 3756.78 |
| Growth rate production, %. | – | 1.96 | –5.48 | –10.00 | –14.11 | 8.26 |
| Export growth rate, %. | – | –22.93 | 20.05 | 10.99 | –57.84 | 10.79 |
| Imports growth rate, %. | – | 80.99 | 35.36 | –18.55 | –26.77 | –8.42 |
| Cheeses | | | | | | |
| Production, thousand tons | 2314.72 | 2230.31 | 2270.51 | 2182.20 | 1864.25 | 2006.59 |
| Exports, thousand tons | 205.79 | 145.88 | 169.30 | 187.44 | 81.84 | 90.41 |
| Imports, thousand tons | 45.00 | 79.53 | 104.72 | 87.08 | 65.75 | 60.51 |
| Market capacity, thousand tons. | 2565.51 | 2455.72 | 2544.53 | 2456.72 | 2011.84 | 2157.51 |
| Production growth rate, %. | – | –3.65 | 1.80 | –3.89 | –14.57 | 7.64 |
| Export growth rate, %. | – | –29.11 | 16.05 | 10.71 | –56.34 | 10.47 |
| Imports growth rate, %. | – | 76.73 | 31.67 | –16.84 | –24.49 | –7.97 |
| Dairy products | | | | | | |
| Production, thousand tons | 1912.16 | 1890.92 | 1668.13 | 1833.05 | 1475.86 | 1562.45 |
| Exports, thousand tons | 153.33 | 116.23 | 136.82 | 152.30 | 71.61 | 72.32 |
| Imports, thousand tons | 32.40 | 65.72 | 79.20 | 73.06 | 51.29 | 43.50 |
| Market capacity, thousand tons. | 2097.89 | 2072.87 | 1884.15 | 2058.41 | 1598.76 | 1678.27 |
| Production growth rate, %. | – | –1.11 | –11.78 | 9.89 | –19.49 | 5.87 |

Continuation of Table 1

| 1 | 2 | 3 | 4 | 5 | 6 | 7 |
|--------------------------------------|---------|---------|---------|---------|---------|--------|
| Export growth rate, %. | – | –24.20 | 17.71 | 11.31 | –52.98 | 0.99 |
| Imports growth rate, %. | – | 102.84 | 11.60 | –7.75 | –29.80 | –15.19 |
| Other types of dairy products | | | | | | |
| Production, thousand tons | 1509.60 | 1745.46 | 1158.43 | 960.17 | 1203.99 | 1031.1 |
| Exports, thousand tons | 117.02 | 75.90 | 78.77 | 101.53 | 44.33 | 47.60 |
| Imports, thousand tons | 21.60 | 45.16 | 57.64 | 47.23 | 27.62 | 30.62 |
| Market capacity, thousand tons. | 1648.22 | 1866.52 | 1294.84 | 1108.93 | 1275.94 | 1109.3 |
| Production growth rate, %. | – | 15.62 | –33.63 | –11.36 | 21.05 | –14.36 |
| Export growth rate, %. | – | –35.14 | 3.78 | 28.89 | –56.34 | 7.38 |
| Imports growth rate, %. | – | 109.07 | 27.64 | –18.06 | –41.52 | 10.86 |

Source: compiled by the authors based on [12–14]

According to Table 2, we can draw the following conclusions about the capacity of the dairy industry market segments by product range over the next 6 years:

1. *Condensed milk and cream.* From 2018 to 2019, there was an increase in production from 4327.52 thousand tons (2018) to 4412.14 thousand tons (2019) Subsequently, in 2019 to 2022, there is a decrease in the production of the dairy industry: 2020 (4170.33 thousand tons), 2022 (3223.60 thousand tons). In 2023, there is a slight increase in production, namely 3489.73 thousand tons. Exports of milk and condensed cream have a fluctuating trend. From 2018 to 2019, it decreased from 330.87 thousand tons (2018) to 254.99 thousand tons (2019). From 2019 to 2021, there is an increase to 339.74 thousand tons (2021). In 2022, this figure drops to 143.22 thousand tons, and in 2023 it increases to 158.67 thousand tons. Imports of this group of dairy products from 2018 to 2020 increased from 81 thousand tons (2018) to 198.44 thousand tons (2020). From 2021 to 2023, this figure will decrease: from 161.62 thousand tons (2021) to 108.38 thousand tons (2023). In 2023, the market capacity of this group amounted to 3756.78 thousand tons. The production growth rate is 8.26 %. The export growth rate is 10.79 %. The growth rate of imports is 8.42 %.

2. *The second group of dairy products is cheese.* Analyzing the production of this assortment, we can say that production from 2018 to 2022 decreased: in 2018 (2314.71 thousand tons), in 2020 (2270.51 thousand tons), and in 2022 (1864.25 thousand tons). And in 2023, production increased to 2006.59 thousand tons. cheese exports from 2018 to 2019 decreased: from 205.79 thousand tons (2018) to 145.88 thousand tons (2019). From 2020 to 2021, there was an increase in cheese exports, namely in 2020 – 169.30 thousand tons, and in 2021 – 187.44 thousand tons. In 2022, exports decreased to 81.84 thousand tons due to the outbreak of a full-scale war, and in 2023 they increased by 90.41 thousand tons. There has been an increase in cheese imports from 2018 to 2020: 45 thousand tons in 2018 to 104.72 thousand

tons in 2020. From 2021 to 2023, there is a decrease in cheese imports from 87.08 thousand tons (2021) to 6051 thousand tons (2023). In 2023, the market capacity amounted to 2157.51 thousand tons. The production growth rate is 7.64 %. The export growth rate is 10.47 %. The import growth rate is negative and amounts to –7.97 %.

3. *Sour milk products.* The production of this group of dairy products decreased from 2018 to 2020, namely from 1912.16 thousand tons (2018) to 1668.13 thousand tons in (2020). In 2021, it increased to 1833.05 thousand tons. In 2022, the production of fermented milk products decreased to 1475.86 thousand tons, and in 2023 it increased to 1562.45 thousand tons. There was a decrease in exports of fermented dairy products in 2019 (116.23 thousand tons) compared to 2018 (153.33 thousand tons) From 2020 to 2021, there was an increase in exports from 136.82 thousand tons (2020) to 152.30 thousand tons. In 2022, the export of fermented milk products decreased to 71.61 thousand tons, and in 2023 it increased to 72.32 thousand tons. From 2018 to 2020, there was an increase in imports of fermented dairy products, namely 2018 (32.40 thousand tons), 79.20 thousand tons (2020) There is a decrease in imports of fermented dairy products from 2021 to 2023: from 73.06 thousand tons to 43.50 thousand tons in 2023. The market capacity in 2023 is 1678.27 thousand tons. The production growth rate is 5.87 %. Export growth rate is 0.99 %. The negative value of the import growth rate is –15.19 %.

4. *Other types of dairy products.* The production of this group from 2018 to 2019 increased to 1745.46 thousand tons in 2019. In 2020–2021, there will be a decrease in other types of dairy products: 1158.43 thousand tons – 2020; 960.17 thousand tons (2021) From 2022 to 2023, there is a decrease in production from 1203.99 thousand tons (2022) to 1023.06 thousand tons (2023). Exports of other types of dairy products have fluctuating dynamics In 2019, a decrease from 117.02 thousand tons (2018) to 75.90 thousand tons. In 2021, there is an increase from 78.77 thousand tons (2020) to

101.53 thousand tons. In 2022, exports of other types of products decreased to 44.33 thousand tons, and in 2023 increased to 47.60 thousand tons. Imports of this group amounted to 21.60 thsd tonnes in 2018. In 2020, it increased to 57.64 thsd tonnes, and in 2022, it decreased to 27.62 thsd tonnes. In 2023, imports of other types of dairy products amounted to 30.62 thousand tons. The market capacity is 1109.28 thousand tons. The growth rate of production of other types of dairy products in 2023 was -14.36% ; the growth rate of exports was 7.38% , and the growth rate of imports was 10.86% .

Conclusions. Thus, the analysis of demand for dairy products can reveal changes in consumer preferences and demand for different types of products, such as milk, yogurt, cheese, etc. Market research will help companies focus their marketing and product development strategies. Studying trends in consumer behavior, such as changes in preferences for organic products, sustainable production, or increased demand for alternatives to traditional dairy products, can help companies adapt to market changes and attract new consumers.

Studying competitors' marketing strategies, products, and pricing will help companies better understand their place in the market and find opportunities to improve their competitiveness.

Evaluating the effectiveness of marketing campaigns in the dairy industry will help companies understand how their consumers respond to different types of promotion and advertising, which will allow them to optimize their marketing efforts.

By studying the factors that influence consumer loyalty to dairy brands, companies will be able to develop strategies to attract and retain customers.

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