

## Conclusions

- The crisis in Ukrainian cheese-making business is almost over
- Cheese-maker are increasing the volumes of milk to process again
- After a double fall in 2014-2016, hard cheese production has stabilized
- Starting 2014 manufacturing of cheese products has significantly exceeded production of real cheese
- The bottom in the fall of the cheese production has been already passed, gradual growth is assumed
- The production of cheese products will have to be reduced already this year
- In Ukraine there is a tendency of growth of white cheese production
- There are about 50 effective cheese-making plants in the country
- Four companies produce more than a half of hard cheese volume
- Most large cheese-makers are involved in production of cheese products
- Production of processed cheese has increased to the pre-crisis level
- Reduction of cheese consumption in Ukraine has stopped
- Domestic consumers prefer cheese to cheese products. Last year consumption of the cheese products decreased by 16%
- Ukrainians began to like "white cheeses", their sales are growing fast
- Consumption of processed cheese has increased to pre-crisis level of 2013
- A few years ago, almost half of hard cheeses production was exported, now only 11%
- Three quarters of the Ukrainian market of hard cheese are controlled by six operators
- Only about 30% of the produced cheese products are sold on the domestic market
- Imports of cheese are rapidly increasing again after the collapse in 2015-2016
- Poland is the largest supplier of cheese to Ukraine
- Since 2013 exports of hard cheese in Ukraine has decreased eight times
- Last year exports of cheese products rose by almost a third, but this year, their exporters may have serious problems.
- A half of all cheese exports is carried out by one company
- Kazakhstan remains the main importer of Ukrainian cheese
- New markets for Ukrainian cheeses have not yet been found and it is unlikely they will found taking into account the high cost of Ukrainian cheese
- Rating of cheese exporters has changed significantly
- In 2017, export prices for cheese were one-third lower than in the pre-crisis period of 2013
- Domestic cheese prices in Ukraine are too high, which contributes to the increase of imports
- Due to the high competition and limited sales markets, cheese products are exported at prices on the verge of unprofitability
- In 2018 the relative stability of cheese process is expected
- In the global dairy market, processing of raw milk into cheese again becomes more beneficial than processing into dry milk and butter
- Over the past ten years, global cheese production has increased by 13%
- Due to Russian embargo trading flows in the global cheese market have been radically redistributed
- In four years production of cheese in Russia has grown by a third, but mainly due to the category of cheap cheese products
- Belarus earned on the Russian sanctions - exports of cheese to Russian Federation has grown by one third
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