

Dairy Products and Alternatives in Kazakhstan

September 2023

Table of Contents

Dairy Products and Alternatives in Kazakhstan

EXECUTIVE SUMMARY

Dairy products and alternatives in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for dairy products and alternatives?

MARKET DATA

- Table 1 Sales of Dairy Products and Alternatives by Category: Value 2018-2023
- Table 2 Sales of Dairy Products and Alternatives by Category: % Value Growth 2018-2023
- Table 3 NBO Company Shares of Dairy Products and Alternatives: % Value 2019-2023
- Table 4 LBN Brand Shares of Dairy Products and Alternatives: % Value 2020-2023
- Table 5 Distribution of Dairy Products and Alternatives by Format: % Value 2018-2023
- Table 6 Forecast Sales of Dairy Products and Alternatives by Category: Value 2023-2028
- Table 7 Forecast Sales of Dairy Products and Alternatives by Category: % Value Growth 2023-2028

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baby Food in Kazakhstan

KEY DATA FINDINGS

2023 DEVELOPMENTS

A rising birth rate supports healthy volume growth

Nestlé further cements its leading position

Prepared baby food registers highest current value growth

PROSPECTS AND OPPORTUNITIES

Healthy growth, supported by high birth rate

Potential increase in local value share

Prepared baby food sees highest growth

CATEGORY DATA

- Table 8 Sales of Baby Food by Category: Volume 2018-2023
- Table 9 Sales of Baby Food by Category: Value 2018-2023
- Table 10 Sales of Baby Food by Category: % Volume Growth 2018-2023
- Table 11 Sales of Baby Food by Category: % Value Growth 2018-2023
- Table 12 NBO Company Shares of Baby Food: % Value 2019-2023
- Table 13 LBN Brand Shares of Baby Food: % Value 2020-2023
- Table 14 Distribution of Baby Food by Format: % Value 2018-2023
- Table 15 Forecast Sales of Baby Food by Category: Volume 2023-2028
- Table 16 Forecast Sales of Baby Food by Category: Value 2023-2028
- Table 17 Forecast Sales of Baby Food by Category: % Volume Growth 2023-2028
- Table 18 Forecast Sales of Baby Food by Category: % Value Growth 2023-2028

Butter and Spreads in Kazakhstan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Consumers buy smaller pack sizes, in order to reduce spend

Maslo-Delwill remains leading player in 2023

Cooking fats on the decline as the health and wellness trend gathers pace

PROSPECTS AND OPPORTUNITIES

Population growth boosts volume sales

Butter registers higher volume growth as consumers perceive it as healthier

In a mature product area, health and wellness key differentiators

CATEGORY DATA

- Table 19 Sales of Butter and Spreads by Category: Volume 2018-2023
- Table 20 Sales of Butter and Spreads by Category: Value 2018-2023
- Table 21 Sales of Butter and Spreads by Category: % Volume Growth 2018-2023
- Table 22 Sales of Butter and Spreads by Category: % Value Growth 2018-2023
- Table 23 NBO Company Shares of Butter and Spreads: % Value 2019-2023
- Table 24 LBN Brand Shares of Butter and Spreads: % Value 2020-2023
- Table 25 Distribution of Butter and Spreads by Format: % Value 2018-2023
- Table 26 Forecast Sales of Butter and Spreads by Category: Volume 2023-2028
- Table 27 Forecast Sales of Butter and Spreads by Category: Value 2023-2028
- Table 28 Forecast Sales of Butter and Spreads by Category: % Volume Growth 2023-2028
- Table 29 Forecast Sales of Butter and Spreads by Category: % Value Growth 2023-2028

Cheese in Kazakhstan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Fall in volume sales, as inflation persists

Fall in volume sales for hard cheese

Food Master continues to lead cheese

PROSPECTS AND OPPORTUNITIES

Soft cheese benefits from supply disruptions for hard cheese

Increased local production

Potential for added-value benefits

CATEGORY DATA

- Table 30 Sales of Cheese by Category: Volume 2018-2023
- Table 31 Sales of Cheese by Category: Value 2018-2023
- Table 32 Sales of Cheese by Category: % Volume Growth 2018-2023
- Table 33 Sales of Cheese by Category: % Value Growth 2018-2023
- Table 34 Sales of Spreadable Processed Cheese by Type: % Value 2018-2023
- Table 35 NBO Company Shares of Cheese: % Value 2019-2023
- Table 36 LBN Brand Shares of Cheese: % Value 2020-2023
- Table 37 Distribution of Cheese by Format: % Value 2018-2023
- Table 38 Forecast Sales of Cheese by Category: Volume 2023-2028
- Table 39 Forecast Sales of Cheese by Category: Value 2023-2028
- Table 40 Forecast Sales of Cheese by Category: % Volume Growth 2023-2028
- Table 41 Forecast Sales of Cheese by Category: % Value Growth 2023-2028

Drinking Milk Products in Kazakhstan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Stabilisation in prices

No change in competitive landscape

Fresh milk is stagnating

PROSPECTS AND OPPORTUNITIES

Moderate outlook over forecast period

Focus on increased local production

Development of plant-based milk over forecast period could dampen volume sales slightly

CATEGORY DATA

Table 42 - Sales of Drinking Milk Products by Category: Volume 2018-2023

Table 43 - Sales of Drinking Milk Products by Category: Value 2018-2023

Table 44 - Sales of Drinking Milk Products by Category: % Volume Growth 2018-2023

Table 45 - Sales of Drinking Milk Products by Category: % Value Growth 2018-2023

Table 46 - NBO Company Shares of Drinking Milk Products: % Value 2019-2023

Table 47 - LBN Brand Shares of Drinking Milk Products: % Value 2020-2023

Table 48 - Distribution of Drinking Milk Products by Format: % Value 2018-2023

Table 49 - Forecast Sales of Drinking Milk Products Products by Category: Volume 2023-2028

Table 50 - Forecast Sales of Drinking Milk Products Products by Category: Value 2023-2028

Table 51 - Forecast Sales of Drinking Milk Products Products by Category: % Volume Growth 2023-2028

Table 52 - Forecast Sales of Drinking Milk Products Products by Category: % Value Growth 2023-2028

Yoghurt and Sour Milk Products in Kazakhstan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Volume sales fall for yoghurt

International players continue to dominate

Significant volume sales of informal sour milk products

PROSPECTS AND OPPORTUNITIES

Muted growth over forecast period

Players focus on healthier positioning

Price continues to be key driver of value sales

CATEGORY DATA

Table 53 - Sales of Yoghurt and Sour Milk Products by Category: Volume 2018-2023

Table 54 - Sales of Yoghurt and Sour Milk Products by Category: Value 2018-2023

Table 55 - Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2018-2023

Table 56 - Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2018-2023

Table 57 - NBO Company Shares of Yoghurt and Sour Milk Products: % Value 2019-2023

Table 58 - LBN Brand Shares of Yoghurt and Sour Milk Products: % Value 2020-2023

Table 59 - Distribution of Yoghurt and Sour Milk Products by Format: % Value 2018-2023

Table 60 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Volume 2023-2028

Table 61 - Forecast Sales of Yoghurt and Sour Milk Products by Category: Value 2023-2028

Table 62 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Volume Growth 2023-2028

Table 63 - Forecast Sales of Yoghurt and Sour Milk Products by Category: % Value Growth 2023-2028

Other Dairy in Kazakhstan

KEY DATA FINDINGS

2023 DEVELOPMENTS

Muted volume growth, as inflation still bites

Traditional products still dominate

Lactalis benefits from its investment in local manufacturing

PROSPECTS AND OPPORTUNITIES

Price continues to be key driver of value sales

Opportunities lie in added-value proposals to reinvent the image of other dairy

Marginal growth for condensed milk

CATEGORY DATA

Table 64 - Sales of Other Dairy by Category: Volume 2018-2023

Table 65 - Sales of Other Dairy by Category: Value 2018-2023

Table 66 - Sales of Other Dairy by Category: % Volume Growth 2018-2023

Table 67 - Sales of Other Dairy by Category: % Value Growth 2018-2023

Table 68 - NBO Company Shares of Other Dairy: % Value 2019-2023

Table 69 - LBN Brand Shares of Other Dairy: % Value 2020-2023

Table 70 - Distribution of Other Dairy by Format: % Value 2018-2023

Table 71 - Forecast Sales of Other Dairy by Category: Volume 2023-2028

Table 72 - Forecast Sales of Other Dairy by Category: Value 2023-2028

Table 73 - Forecast Sales of Other Dairy by Category: % Volume Growth 2023-2028

Table 74 - Forecast Sales of Other Dairy by Category: % Value Growth 2023-2028

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- Strategy Briefings: Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- Company Profiles: Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- Country Reports: For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer
 trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with
 country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/dairy-products-and-alternatives-in-kazakhstan/report.