



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.