



Staple Foods in Kazakhstan

December 2024

Table of Contents

EXECUTIVE SUMMARY

- Staple foods in 2024: The big picture
- Key trends in 2024
- Competitive Landscape
- Channel developments
- What next for staple foods?

MARKET DATA

- Table 1 - Sales of Staple Foods by Category: Volume 2019-2024
- Table 2 - Sales of Staple Foods by Category: Value 2019-2024
- Table 3 - Sales of Staple Foods by Category: % Volume Growth 2019-2024
- Table 4 - Sales of Staple Foods by Category: % Value Growth 2019-2024
- Table 5 - NBO Company Shares of Staple Foods: % Value 2020-2024
- Table 6 - LBN Brand Shares of Staple Foods: % Value 2021-2024
- Table 7 - Penetration of Private Label by Category: % Value 2020-2024
- Table 8 - Distribution of Staple Foods by Format: % Value 2019-2024
- Table 9 - Forecast Sales of Staple Foods by Category: Volume 2024-2029
- Table 10 - Forecast Sales of Staple Foods by Category: Value 2024-2029
- Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2024-2029
- Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

- Summary 1 - Research Sources

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Impact of healthy eating trend and economic uncertainty
- Healthier pastries preferred
- Competitive landscape remains highly fragmented

PROSPECTS AND OPPORTUNITIES

- Bread will remain an important staple
- Combination of traditional flavours and innovation will shape cakes
- Rise of mini-bakeries, in-store bakeries and retail e-commerce

CATEGORY DATA

- Table 13 - Sales of Baked Goods by Category: Volume 2019-2024
- Table 14 - Sales of Baked Goods by Category: Value 2019-2024
- Table 15 - Sales of Baked Goods by Category: % Volume Growth 2019-2024
- Table 16 - Sales of Baked Goods by Category: % Value Growth 2019-2024
- Table 17 - Sales of Pastries by Type: % Value 2019-2024
- Table 18 - NBO Company Shares of Baked Goods: % Value 2020-2024
- Table 19 - LBN Brand Shares of Baked Goods: % Value 2021-2024
- Table 20 - Distribution of Baked Goods by Format: % Value 2019-2024
- Table 21 - Forecast Sales of Baked Goods by Category: Volume 2024-2029
- Table 22 - Forecast Sales of Baked Goods by Category: Value 2024-2029
- Table 23 - Forecast Sales of Baked Goods by Category: % Volume Growth 2024-2029

Table 24 - Forecast Sales of Baked Goods by Category: % Value Growth 2024-2029

Breakfast Cereals in Kazakhstan

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Stable volume sales in 2024
- International brands maintain their lead
- Muesli and granola decline as consumers shift to more affordable options

PROSPECTS AND OPPORTUNITIES

- Retail development and population growth are growth drivers
- Innovative and healthier options expected
- Rise of retail e-commerce

CATEGORY DATA

- Table 25 - Sales of Breakfast Cereals by Category: Volume 2019-2024
- Table 26 - Sales of Breakfast Cereals by Category: Value 2019-2024
- Table 27 - Sales of Breakfast Cereals by Category: % Volume Growth 2019-2024
- Table 28 - Sales of Breakfast Cereals by Category: % Value Growth 2019-2024
- Table 29 - NBO Company Shares of Breakfast Cereals: % Value 2020-2024
- Table 30 - LBN Brand Shares of Breakfast Cereals: % Value 2021-2024
- Table 31 - Distribution of Breakfast Cereals by Format: % Value 2019-2024
- Table 32 - Forecast Sales of Breakfast Cereals by Category: Volume 2024-2029
- Table 33 - Forecast Sales of Breakfast Cereals by Category: Value 2024-2029
- Table 34 - Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2024-2029
- Table 35 - Forecast Sales of Breakfast Cereals by Category: % Value Growth 2024-2029

Processed Fruit and Vegetables in Kazakhstan

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Population growth supports demand for processed fruit and vegetables in 2024
- Price increases in line with inflation
- Cucumbers and tomatoes are the most popular processed vegetables

PROSPECTS AND OPPORTUNITIES

- Intense competition over the forecast period
- Healthy eating trend could support growth of frozen products
- Private label share may increase with the expansion of modern grocery retailers

CATEGORY DATA

- Table 36 - Sales of Processed Fruit and Vegetables by Category: Volume 2019-2024
- Table 37 - Sales of Processed Fruit and Vegetables by Category: Value 2019-2024
- Table 38 - Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2019-2024
- Table 39 - Sales of Processed Fruit and Vegetables by Category: % Value Growth 2019-2024
- Table 40 - Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2019-2024
- Table 41 - NBO Company Shares of Processed Fruit and Vegetables: % Value 2020-2024
- Table 42 - LBN Brand Shares of Processed Fruit and Vegetables: % Value 2021-2024
- Table 43 - Distribution of Processed Fruit and Vegetables by Format: % Value 2019-2024
- Table 44 - Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2024-2029
- Table 45 - Forecast Sales of Processed Fruit and Vegetables by Category: Value 2024-2029

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2024-2029

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2024-2029

Processed Meat, Seafood and Alternatives To Meat in Kazakhstan

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Mixed performance in processed seafood in 2024
- Structural changes in the Viciunai Group
- Popularity of barbecuing meat continues to support demand for chilled processed meat

PROSPECTS AND OPPORTUNITIES

- Popularity of barbecuing and picnics will support demand for chilled processed red meat
- Economic and health factors to fuel growth of chilled processed poultry
- Local brands will continue to lead shelf stable meat, benefiting from established consumer trust

CATEGORY DATA

- Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2019-2024
- Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2019-2024
- Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2019-2024
- Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2019-2024
- Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2019-2024
- Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2019-2024
- Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2019-2024
- Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2019-2024
- Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2019-2024
- Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2020-2024
- Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2021-2024
- Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2019-2024
- Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2024-2029
- Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2024-2029

Rice, Pasta and Noodles in Kazakhstan

KEY DATA FINDINGS

2024 DEVELOPMENTS

- Rice sees significant price hikes due to poor harvest
- Rising prices lead to shift to more affordable pasta
- Doshirak brand increases its market share

PROSPECTS AND OPPORTUNITIES

- Development of modern grocery retailers will drive demand for noodles
- Reliance on rice imports set to continue
- Rising popularity of healthier pasta alternatives

CATEGORY DATA

- Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2019-2024
- Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2019-2024
- Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2019-2024
- Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2019-2024
- Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2019-2024
- Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2020-2024

Table 68 - LBN Brand Shares of Rice, Pasta and Noodles: % Value 2021-2024

Table 69 - NBO Company Shares of Rice: % Value 2020-2024

Table 70 - LBN Brand Shares of Rice: % Value 2021-2024

Table 71 - NBO Company Shares of Pasta: % Value 2020-2024

Table 72 - LBN Brand Shares of Pasta: % Value 2021-2024

Table 73 - NBO Company Shares of Noodles: % Value 2020-2024

Table 74 - LBN Brand Shares of Noodles: % Value 2021-2024

Table 75 - Distribution of Rice, Pasta and Noodles by Format: % Value 2019-2024

Table 76 - Distribution of Rice by Format: % Value 2019-2024

Table 77 - Distribution of Pasta by Format: % Value 2019-2024

Table 78 - Distribution of Noodles by Format: % Value 2019-2024

Table 79 - Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2024-2029

Table 80 - Forecast Sales of Rice, Pasta and Noodles by Category: Value 2024-2029

Table 81 - Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2024-2029

Table 82 - Forecast Sales of Rice, Pasta and Noodles by Category: % Value Growth 2024-2029

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/staple-foods-in-kazakhstan/report.