



Euromonitor
International

Nicotine in Kazakhstan

August 2026

Table of Contents

EXECUTIVE SUMMARY

2025 Developments

KEY DATA INSIGHTS

KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Nicotine

INDUSTRY PERFORMANCE

E-Vapour Ban Drives Broad-Based Nicotine Growth across Legal Categories

Regulatory Pressure Sustains Illicit Trade across Nicotine Categories

Former E-Vapour Users Reshape Consumption across Multiple Formats

Chart 2 - Volume Sales 2020-2030

Chart 3 - Volume Sales by Category 2025

WHAT'S NEXT?

Temporary Nicotine Growth Set to Give Way to Gradual Decline

Heated Tobacco Set to Remain the Primary Growth Engine

Chart 4 - Analyst Insight for Nicotine

Pipe Tobacco Growth Set to Moderate as Smaller Categories Remain Niche

Chart 5 - Forecast Volume Sales 2020-2030

Chart 6 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Philip Morris and Jti Maintain Leadership as Innovation Strengthens Competitive Intensity

Chart 7 - Company Shares 2025

Chart 8 - Brand Shares 2025

CHANNELS

Small Local Grocers Sustain Cigarette Sales Despite Gradual Decline

Specialist Retail Supports Heated Tobacco, While Niche Categories Rely on Targeted Distribution

Digital Platforms Support Engagement Despite Limits on Online Sales

PRODUCTS

Heated Tobacco Growth and Digital Restrictions Shape Innovation Priorities

New Heated Tobacco Platforms and Flavour Innovation Broaden Consumer Choice

Innovation Strengthens Supply Resilience and Competitive Positioning

OPERATING ENVIRONMENT

Legislation

Legislative Overview

Chart 9 - Legislation Summary at a Glance

Minimum Legal Smoking Age

Smoking Prevalence

Tar Levels

Health Warnings

Plain Packaging

Advertising and Sponsorship

Point-Of-Sale Display Bans

Smoking in Public Places

Low Ignition Propensity (Lip) Cigarette Regulation

Flavoured Tobacco Product Ban

Reduced Harm
Vapour Products

PRODUCTION/IMPORTS/EXPORTS

ECONOMIC CONTEXT

Chart 10 - Economic Context for Nicotine
Chart 11 - Real Gdp Growth 2020-2030
Chart 12 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 13 - Consumer Context for Nicotine
Chart 14 - Population 2020-2030
Chart 15 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Cigarettes in Kazakhstan](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Cigarettes Summary

KEY INDUSTRY TRENDS

Chart 16 - Key Industry Trends for Cigarettes

INDUSTRY PERFORMANCE

Cigarette Volumes Return to Growth as Alternatives Become Less Accessible
Former E-Vapour Users Reshape Demand across Cigarettes and Heated Tobacco
Rising Excise Duties Continue to Support Illicit Trade
Chart 17 - Volume Sales 2020-2030

WHAT'S NEXT?

Cigarettes Expected to Resume Their Long-Term Decline Despite Temporary Growth
Flavour Innovation Set to Remain Critical for Retaining Adult Smokers
Heated Tobacco Forecast to Become the Leading Competitive Threat to Cigarettes
Chart 18 - Analyst Insight for Cigarettes
Chart 19 - Forecast Volume Sales 2020-2030

COMPETITIVE LANDSCAPE

Jti Strengthens Leadership through Portfolio Breadth as Kt&G Gains Momentum
Chart 20 - Company Shares 2025
Chart 21 - Brand Shares 2025

CHANNELS

Small Local Grocers Retain Leadership as Modern Retail Gains Momentum
Digital Engagement Supports Sales Despite Restrictions on Online Purchasing
Chart 22 - Retail Channels 2020-2025

PRODUCTS

Flavour Differentiation and Anti-Counterfeit Measures Shape Innovation Priorities
Capsule Formats, Flavour Innovation and Packaging Differentiation Strengthen Consumer Engagement
Innovation Increasingly Supports Margin Protection and Competitive Positioning

TAXATION AND PRICING

Taxation Rates

Average Cigarette Pack Price Breakdown

Chart 23 - Average Cigarette Pack Price Breakdown: Brand Examples

ECONOMIC CONTEXT

Chart 24 - Economic Context for Cigarettes

Chart 25 - Real Gdp Growth 2020-2030

Chart 26 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 27 - Consumer Context for Cigarettes

Chart 28 - Population 2020-2030

Chart 29 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

[Cigars, Cigarillos and Smoking Tobacco in Kazakhstan](#)

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Cigars, Cigarillos and Smoking Tobacco Summary

INDUSTRY PERFORMANCE

Pipe Tobacco Gains Traction as the E-Vapour Ban Redirects Consumers

Hookah and Pipe Tobacco Attract Consumers Displaced by the E-Vapour Ban

Niche Positioning Limits Growth beyond Specialist Channels

Chart 30 - Volume Sales 2020-2030

Chart 31 - Volume Sales by Category 2025

WHAT'S NEXT?

Hookah Demand and Flavour Innovation Expected to Drive Future Category Growth

Fine Cut Tobacco Set to Expand Gradually From a Small Base

Chart 32 - Forecast Volume Sales 2020-2030

Chart 33 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Russian Smoking Tobacco Brands Gain Share as Market Fragmentation Increases

Chart 34 - Company Shares 2025

Chart 35 - Brand Shares 2025

CHANNELS

Food, Drink and Tobacco Specialists Secure Dominance with Premium Assortment

ECONOMIC CONTEXT

Chart 36 - Economic Context for Cigars, Cigarillos and Smoking Tobacco

Chart 37 - Real Gdp Growth 2020-2030

Chart 38 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 39 - Consumer Context for Cigars, Cigarillos and Smoking Tobacco

Chart 40 - Population 2020-2030

Chart 41 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

Smokeless Tobacco, E-Vapour Products and Heated Tobacco in Kazakhstan

KEY DATA INSIGHTS

2025 DEVELOPMENTS

Smokeless Tobacco, E-Vapour Products and Heated Tobacco Summary

INDUSTRY PERFORMANCE

Heated Tobacco Reaches a New Consumption High as Consumer Switching and Industry Investment Accelerate

Regulatory Ban Pushes E-Vapour into Illicit Channels as Seizures Escalate

Chart 42 - Volume Sales 2020-2030

Chart 43 - Volume Sales by Category 2025

WHAT'S NEXT?

Heated Tobacco Growth Set to Continue as Legal Alternatives Remain Limited

Innovation in Flavours and Devices Expected to Intensify Competition

Philip Morris International Set to Retain Its Leadership Advantage

Chart 44 - Forecast Volume Sales 2020-2030

Chart 45 - Forecast Volume Sales by Category 2025-2030

COMPETITIVE LANDSCAPE

Philip Morris Strengthens Its Lead through Innovation and Local Production

Chart 46 - Company Shares 2025

Chart 47 - Brand Shares 2025

CHANNELS

Specialist Retailers Maintain Leadership as Branded Retail and Digital Engagement Expand

ECONOMIC CONTEXT

Chart 48 - Economic Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 49 - Real Gdp Growth 2020-2030

Chart 50 - Inflation 2020-2030

CONSUMER CONTEXT

Chart 51 - Consumer Context for Smokeless Tobacco, E-Vapour Products and Heated Tobacco

Chart 52 - Population 2020-2030

Chart 53 - Population by Generation 2025

COUNTRY REPORTS DISCLAIMER

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/nicotine-in-kazakhstan/report.