



Coffee in Kazakhstan

December 2025

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Coffee in Kazakhstan - Category analysis

KEY DATA FINDINGS

2025 DEVELOPMENTS

Instant coffee still dominates

INDUSTRY PERFORMANCE

Fresh coffee in particular impacted by steep price rises

Instant coffee mixes gain most value share

WHAT'S NEXT?

Positive outlook over forecast period

Flavour innovation in instant coffee mixes

Fresh coffee registers highest volume growth

COMPETITIVE LANDSCAPE

MacCoffee leads in terms of volume share

Jacobs Douwe Egberts gains most value share

CHANNELS

Small local grocers dominate, but are losing value share

Significant volume sales through foodservice

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Hot Drinks in Kazakhstan - Industry Overview

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Developing coffee culture

Flavour innovation key driver of growth

WHAT'S NEXT?

Minimal volume growth over forecast period

Health and wellness key drivers of growth

Continuing innovation supports sales

COMPETITIVE LANDSCAPE

RG Brands AO continues to have sizeable foothold

Jacobs Douwe Egberts gains most value

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