

# Staple Foods in Kazakhstan

November 2023

**Table of Contents** 

## Staple Foods in Kazakhstan

#### **EXECUTIVE SUMMARY**

Staple foods in 2023: The big picture

Key trends in 2023

Competitive Landscape

Channel developments

What next for staple foods?

#### MARKET DATA

- Table 1 Sales of Staple Foods by Category: Volume 2018-2023
- Table 2 Sales of Staple Foods by Category: Value 2018-2023
- Table 3 Sales of Staple Foods by Category: % Volume Growth 2018-2023
- Table 4 Sales of Staple Foods by Category: % Value Growth 2018-2023
- Table 5 NBO Company Shares of Staple Foods: % Value 2019-2023
- Table 6 LBN Brand Shares of Staple Foods: % Value 2020-2023
- Table 7 Penetration of Private Label by Category: % Value 2019-2023
- Table 8 Distribution of Staple Foods by Format: % Value 2018-2023
- Table 9 Forecast Sales of Staple Foods by Category: Volume 2023-2028
- Table 10 Forecast Sales of Staple Foods by Category: Value 2023-2028
- Table 11 Forecast Sales of Staple Foods by Category: % Volume Growth 2023-2028
- Table 12 Forecast Sales of Staple Foods by Category: % Value Growth 2023-2028

#### DISCLAIMER

#### **SOURCES**

Summary 1 - Research Sources

## Baked Goods in Kazakhstan

## KEY DATA FINDINGS

## 2023 DEVELOPMENTS

Modest volume growth, supported by population growth

Competitive landscape remains highly fragmented

Bread with a healthier positioning gaining value share

## PROSPECTS AND OPPORTUNITIES

Bread continues to be an important part of the daily diet

Growing interest in healthier bread products

Pastries and cakes register higher volume growth

#### **CATEGORY DATA**

- Table 13 Sales of Baked Goods by Category: Volume 2018-2023
- Table 14 Sales of Baked Goods by Category: Value 2018-2023
- Table 15 Sales of Baked Goods by Category: % Volume Growth 2018-2023
- Table 16 Sales of Baked Goods by Category: % Value Growth 2018-2023
- Table 17 Sales of Pastries by Type: % Value 2018-2023
- Table 18 NBO Company Shares of Baked Goods: % Value 2019-2023
- Table 19 LBN Brand Shares of Baked Goods: % Value 2020-2023
- Table 20 Distribution of Baked Goods by Format: % Value 2018-2023
- Table 21 Forecast Sales of Baked Goods by Category: Volume 2023-2028
- Table 22 Forecast Sales of Baked Goods by Category: Value 2023-2028
- Table 23 Forecast Sales of Baked Goods by Category: % Volume Growth 2023-2028

## Breakfast Cereals in Kazakhstan

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Volume decline in 2023

Russian brands register higher growth

Hot cereals fares best

#### PROSPECTS AND OPPORTUNITIES

Positive outlook over forecast period

Imported brands continue to dominate

Children's breakfast cereal also seen as snack option

#### **CATEGORY DATA**

- Table 25 Sales of Breakfast Cereals by Category: Volume 2018-2023
- Table 26 Sales of Breakfast Cereals by Category: Value 2018-2023
- Table 27 Sales of Breakfast Cereals by Category: % Volume Growth 2018-2023
- Table 28 Sales of Breakfast Cereals by Category: % Value Growth 2018-2023
- Table 29 NBO Company Shares of Breakfast Cereals: % Value 2019-2023
- Table 30 LBN Brand Shares of Breakfast Cereals: % Value 2020-2023
- Table 31 Distribution of Breakfast Cereals by Format: % Value 2018-2023
- Table 32 Forecast Sales of Breakfast Cereals by Category: Volume 2023-2028
- Table 33 Forecast Sales of Breakfast Cereals by Category: Value 2023-2028
- Table 34 Forecast Sales of Breakfast Cereals by Category: % Volume Growth 2023-2028
- Table 35 Forecast Sales of Breakfast Cereals by Category: % Value Growth 2023-2028

## Processed Fruit and Vegetables in Kazakhstan

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Prices fall for processed fruit and vegetables

Company leader Bonduelle loses value share

Shelf stable vegetables accounts for most volume sales.

## PROSPECTS AND OPPORTUNITIES

Muted constant value growth over forecast period

Peas, corn and tomatoes set to continue driving sales of processed fruit and vegetables

Health concerns will limit the consumption of shelf stable fruit

## **CATEGORY DATA**

- Table 36 Sales of Processed Fruit and Vegetables by Category: Volume 2018-2023
- Table 37 Sales of Processed Fruit and Vegetables by Category: Value 2018-2023
- Table 38 Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2018-2023
- Table 39 Sales of Processed Fruit and Vegetables by Category: % Value Growth 2018-2023
- Table 40 Sales of Frozen Processed Vegetables by Type: % Value Breakdown 2018-2023
- Table 41 NBO Company Shares of Processed Fruit and Vegetables: % Value 2019-2023
- Table 42 LBN Brand Shares of Processed Fruit and Vegetables: % Value 2020-2023
- Table 43 Distribution of Processed Fruit and Vegetables by Format: % Value 2018-2023
- Table 44 Forecast Sales of Processed Fruit and Vegetables by Category: Volume 2023-2028
- Table 45 Forecast Sales of Processed Fruit and Vegetables by Category: Value 2023-2028

Table 46 - Forecast Sales of Processed Fruit and Vegetables by Category: % Volume Growth 2023-2028

Table 47 - Forecast Sales of Processed Fruit and Vegetables by Category: % Value Growth 2023-2028

#### Processed Meat, Seafood and Alternatives To Meat in Kazakhstan

#### **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Increase in volume growth in spite of uncertainty

Processed seafood registers volume decline

Popularity of barbecuing meat supports demand for chilled processed meat

#### PROSPECTS AND OPPORTUNITIES

Moderate outlook over forecast period

Increase in supplies of frozen processed seafood from Baltic countries.

Viciunai Group set to remain strong leader in processed seafood

#### **CATEGORY DATA**

Table 48 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2018-2023

Table 49 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2018-2023

Table 50 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Volume Growth 2018-2023

Table 51 - Sales of Processed Meat, Seafood and Alternatives to Meat by Category: % Value Growth 2018-2023

Table 52 - Sales of Shelf Stable Processed Red Meat by Type: % Volume Breakdown 2018-2023

Table 53 - Sales of Chilled Processed Red Meat by Type: % Volume Breakdown 2018-2023

Table 54 - Sales of Frozen Processed Red Meat by Type: % Volume Breakdown 2018-2023

Table 55 - Sales of Frozen Processed Poultry by Type: % Value Breakdown 2018-2023

Table 56 - Sales of Frozen Processed Seafood by Type: % Value Breakdown 2018-2023

Table 57 - NBO Company Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2019-2023

Table 58 - LBN Brand Shares of Processed Meat, Seafood and Alternatives to Meat: % Value 2020-2023

Table 59 - Distribution of Processed Meat, Seafood and Alternatives to Meat by Format: % Value 2018-2023

Table 60 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Volume 2023-2028

Table 61 - Forecast Sales of Processed Meat, Seafood and Alternatives to Meat by Category: Value 2023-2028

## Rice, Pasta and Noodles in Kazakhstan

## **KEY DATA FINDINGS**

#### 2023 DEVELOPMENTS

Healthy volume growth in instant noodles

Demand for pasta does not fall, despite rising prices.

Price increases for rice dampens volume demand

#### PROSPECTS AND OPPORTUNITIES

Increased demand for premium brands of instant noodles

Expanding food consumption opportunities for pasta

Further price increase for rice in short term

#### **CATEGORY DATA**

Table 62 - Sales of Rice, Pasta and Noodles by Category: Volume 2018-2023

Table 63 - Sales of Rice, Pasta and Noodles by Category: Value 2018-2023

Table 64 - Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2018-2023

Table 65 - Sales of Rice, Pasta and Noodles by Category: % Value Growth 2018-2023

Table 66 - Sales of Instant Noodles by Leading Flavours: Rankings 2018-2023

Table 67 - NBO Company Shares of Rice, Pasta and Noodles: % Value 2019-2023

- Table 68 LBN Brand Shares of Rice, Pasta and Noodles: % Value 2020-2023
- Table 69 NBO Company Shares of Rice: % Value 2019-2023
- Table 70 LBN Brand Shares of Rice: % Value 2020-2023
- Table 71 NBO Company Shares of Pasta: % Value 2019-2023
- Table 72 LBN Brand Shares of Pasta: % Value 2020-2023
- Table 73 NBO Company Shares of Noodles: % Value 2019-2023
- Table 74 LBN Brand Shares of Noodles: % Value 2020-2023
- Table 75 Distribution of Rice, Pasta and Noodles by Format: % Value 2018-2023
- Table 76 Distribution of Rice by Format: % Value 2018-2023
- Table 77 Distribution of Pasta by Format: % Value 2018-2023
- Table 78 Distribution of Noodles by Format: % Value 2018-2023
- Table 79 Forecast Sales of Rice, Pasta and Noodles by Category: Volume 2023-2028
- Table 80 Forecast Sales of Rice, Pasta and Noodles by Category: Value 2023-2028
- Table 81 Forecast Sales of Rice, Pasta and Noodles by Category: % Volume Growth 2023-2028
- Table 82 Forecast Sales of Rice, Pasta and Noodles 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/staple-foods-in-kazakhstan/report.