

RTDs in Kazakhstan

Euromonitor International July 2022

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RTDS IN KAZAKHSTAN - CATEGORY ANALYSIS

KEY DATA FINDINGS

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2021 DEVELOPMENTS

RTDs shows stable growth in 2021

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The presence of international brands is growing

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RTDs faces strong competition

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PROSPECTS AND OPPORTUNITIES

RTD sales expected to show moderate growth

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Foreign trend to watch

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Healthier ingredients and fresh tastes offer A way to go

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CATEGORY DATA

Table 1	Sales of RTDs by Category: Total Volume 2016-2021						
'000 litres		2016	2017	2018	2019	2020	2021
Malt-based RTD Spirit-based RTI Wine-based RTI Other RTDs RTDs	Ds		Data	removed	l from san	nple	

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 2 Sales of RTDs by Category: Total Value 2016-2021

KZT bill	ion	2016	2017	2018	2019	2020	2021
Spirit-ba	sed RTDs ased RTDs ased RTDs RTDs		Data	removed	from san	nple	
Source:	Euromonitor International from office store checks, trade interviews, trade	,	de associations,	trade press, con	npany research,		

Table 3 Sales of RTDs by Category: % Total Volume Growth 2016-2021

% total \	volume growth	2020/21	2016-21 CAGR	2016/21 Total
Spirit-ba	sed RTDs Ised RTDs Ised RTDs TDs	Data	removed from s	ample
Source:	Euromonitor International from official stati store checks, trade interviews, trade source	ions, trade pres	s, company research,	

Table 4 Sales of RTDs by Category: % Total Value Growth 2016-2021

% local currency, current value growth

		2020/21	2016-21 CAGR	2016/21 Total
Spirit-ba	sed RTDs ased RTDs ased RTDs TDs	Data	a removed from	sample
Source:	Euromonitor International from official statistic store checks, trade interviews, trade sources	ions, trade pres	s, company research,	

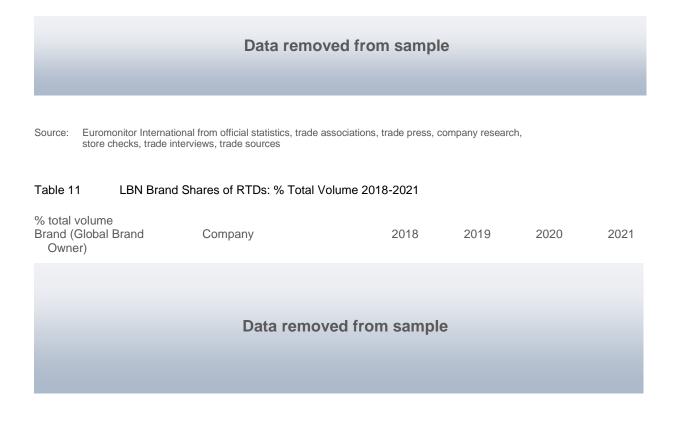
Table 5 Sales of RTDs by Off-trade vs On-trade: Volume 2016-2021

'000 litres							
		2016	2017	2018	2019	2020	2021
Off-trade On-trade Total			Data r	emoved f	rom samp	ble	
Source:	Euromonitor International from of store checks, trade interviews, tra		le associations, t	rade press, com	pany research,		

Table 6 Sales of RTDs by Off-trade vs On-trade: Value 2016-2021

KZT billi	ion	2016	2017	2018	2019	2020	2021	
Off-trade On-trade Total			Da	ita remo	ved from sar	nple		
Source:	Euromonitor International fraction store checks, trade interview		rade associatior	ns, trade press	s, company research,			I
Table 7	Sales of RTDs b	by Off-trade vs On	-trade: % Vol	ume Growth	h 2016-2021			
% volun	ne growth		2	020/21	2016-21 CAGR	2016/2	21 Total	
Off-trade On-trade Total				Data	removed from	n samp	le	
Source:	Euromonitor International fraction store checks, trade interview		rade associatior	ns, trade press	s, company research,			
Table 8	Sales of RTDs b	by Off-trade vs On	-trade: % Val	ue Growth 2	2016-2021			
% curre	nt value growth		2	020/21	2016-21 CAGR	2016/2	21 Total	
Off-trade On-trade Total				Data	removed fro	om samı	ole	
Source:	Euromonitor International fraction store checks, trade interview		rade associatior	ns, trade press	s, company research,			
Table 9	GBO Company	Shares of RTDs: 9	% Total Volur	ne 2017-20	21			
% total Compar			2017	2018	2019	2020	2021	
		Data	removed	from sa	ample			
Source:	Euromonitor International fro store checks, trade interview		rade associatior	ns, trade press	s, company research,			
Table 10	0 NBO Company	Shares of RTDs: 9	% Total Volur	ne 2017-20	21			
	volumo							

 % total volume
 2017
 2018
 2019
 2020
 2021



Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 12 Forecast Sales of RTDs by Category: Total Volume 2021-2026

'000 litres	2021	2022	2023	2024	2025	2026
Malt-based RTDs Spirit-based RTDs Wine-based RTDs Other RTDs RTDs		Data	a removed	l from san	nple	
Source: Euromonitor International from trade sources	de associations,	trade press, com	ipany research, t	trade interviews,		
Table 13 Forecast Sales of RT	Ds by Catego	ry: Total Value	e 2021-2026			
KZT billion	2021	2022	2023	2024	2025	2026
Malt-based RTDs Spirit-based RTDs Wine-based RTDs		Data	a removed	d from sar	nple	

Other RTDs RTDs

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 14 Forecast Sales of RTDs by Category: % Total Volume Growth 2021-2026

% total volume growth	2021/22	2021-26 CAGR	2021/26 Total	
Malt-based RTDs Spirit-based RTDs Wine-based RTDs Other RTDs RTDs	Da	ita removed fro	m sample	
Source: Euromonitor International from trade association trade sources	ons, trade press, company rese	earch, trade interviews,		
Table 15 Forecast Sales of RTDs by Cat % loggl gurranty, constant value growth	egory: % Total Value Gro	wth 2021-2026		
% local currency, constant value growth	2021/2022	2021-26 CAGR	2021/26 Total	
Malt-based RTDs Spirit-based RTDs Wine-based RTDs	Dat	a removed fror	n sample	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

ALCOHOLIC DRINKS IN KAZAKHSTAN - INDUSTRY OVERVIEW

EXECUTIVE SUMMARY

Alcoholic drinks in 2021: The big picture

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2021 key trends

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Competitive landscape

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Retailing developments

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On-trade vs off-trade split

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What next for alcoholic drinks?

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MARKET BACKGROUND

Legislation

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Legal purchasing age and legal drinking age

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Drink driving

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Advertising

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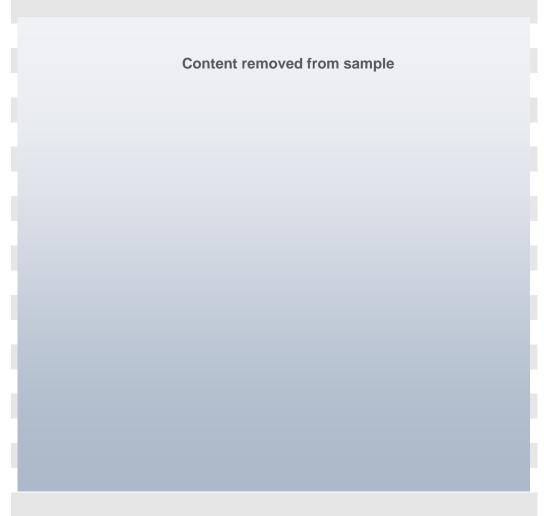
Smoking ban

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Opening hours

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Summary 1 Taxation and Duty Levies on Alcoholic Drinks 2021



Source: Euromonitor International

OPERATING ENVIRONMENT

Contraband/parallel trade

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Duty free

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Cross-border/private imports

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KEY NEW PRODUCT LAUNCHES

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Outlook

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MARKET INDICATORS

	enditure on A	Icoholic Drink	ks 2016-2021			
KZT million	2016	2017	2018	2019	2020	2021
Total		Dat	ta remove	ed from sau	nple	
Source: Euromonitor International from tra trade sources Note: 2021 data is forecast	de associations,	trade press, co	mpany research	n, trade interviews,		
MARKET DATA						
Table 17 Sales of Alcoholic Dr	inks by Categ	ory: Total Vo	lume 2016-20)21		
	2016	2017	2018	2019	2020	2021
Beer (million litres) Cider/Perry ('000 litres)						
RTDs ('000 litres) Spirits ('000 litres) Wine (million litres) Alcoholic Drinks (million litres)		Data	removed	l from sam	ple	
Source: Euromonitor International from off store checks, trade interviews, tra		ade association	s, trade press, c	company research,		
Table 18Sales of Alcoholic DrKZT billion	inks by Categ 2016	ory: Total Val 2017	lue 2016-202 2018	1 2019	2020	2021
	2010	2011	2010		2020	2021
Beer						
Cider/Perry RTDs		Dat	a remove	d from san	nple	
Cider/Perry		Dat	a remove	d from san	nple	
Cider/Perry RTDs Spirits Wine					nple	
Cider/Perry RTDs Spirits Wine Alcoholic Drinks Source: Euromonitor International from off	de sources	ade association:	s, trade press, c	ompany research,	nple	
Cider/Perry RTDs Spirits Wine Alcoholic Drinks Source: Euromonitor International from off store checks, trade interviews, trade	de sources	ade association: ory: % Total ^v	s, trade press, c Volume Grow	ompany research,	2016/21	Total
Cider/Perry RTDs Spirits Wine Alcoholic Drinks Source: Euromonitor International from off store checks, trade interviews, trad Table 19 Sales of Alcoholic Dr % total volume growth Beer	de sources	ade association: ory: % Total ^v	s, trade press, c Volume Grow	rompany research, rth 2016-2021		Total
Cider/Perry RTDs Spirits Wine Alcoholic Drinks Source: Euromonitor International from off store checks, trade interviews, trad Table 19 Sales of Alcoholic Dr % total volume growth	de sources	ade association: ory: % Total ^v	s, trade press, c Volume Grow 020/21 20	rompany research, rth 2016-2021	2016/21	

Alcoholic Drinks	Data removed from sample
	tistics, trade associations, trade press, company research, ces
	y Category: % Total Value Growth 2016-2021
% local currency, current value growth	
Poor	2020/21 2016-21 CAGR 2016/21 Total
Beer Cider/Perry RTDs Spirits Wine	Data removed from sample
Alcoholic Drinks	
Source: Euromonitor International from official sta store checks, trade interviews, trade sou	tistics, trade associations, trade press, company research, ces
Table 21 Sales of Alcoholic Drinks by	y Category by Off-trade vs On-trade: Volume 2021
	Off-trade On-trade Total
Beer (million litres) Cider/Perry ('000 litres) RTDs ('000 litres) Spirits ('000 litres) Wine (million litres) Alcoholic Drinks (million litres)	Data removed from sample
Source: Euromonitor International from official sta store checks, trade interviews, trade sour	tistics, trade associations, trade press, company research, ces
Table 22 Sales of Alcoholic Drinks by	v Category by Off-trade vs On-trade: Value 2021
KZT billion	Off-trade On-trade Total
Beer Cider/Perry RTDs Spirits	Data removed from sample
Wine Alcoholic Drinks	
Source: Euromonitor International from official sta store checks, trade interviews, trade sour	tistics, trade associations, trade press, company research, ces
Table 23 Sales of Alcoholic Drinks by	y Category by Off-trade vs On-trade: % Volume 2021
% volume analysis	Off-trade On-trade Total
Beer Cider/Perry	Data removed from sample

RTDs Spirits Wine Alcoholi	ic Drinks	Data removed from sample
Source:	Euromonitor International from official sta store checks, trade interviews, trade sour	tistics, trade associations, trade press, company research, ces

Table 24 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Value 2021

% value	e analysis	(Off-trade	On-trade	Total
Beer Cider/P RTDs Spirits Wine Alcoholi	erry ic Drinks		Data remo	oved from sample	2
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources					

Table 25 GBO Company Shares of Alcoholic Drinks: % Total Volume 2017-2021

% total volume Company	2017	2018	2019	2020	2021
Da	ita removed	from sam	nple		

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

	Table 26	Distribution of Alcoholic Drinks by Format: % Off-trade Value 2016-2021
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% off-trade	2016	2017	2018	2019	2020	2021
Store-Based Retailing - Grocery Retailers Modern Grocery Retailers Convenience Stores Discounters		Data	ı removed	l from san	nple	

Retailers Food/drink/tobacco specialists Independent Small Grocers Other Grocery Retailers Other Grocery Retailers Drugstores/ parapharmacies Other Non-Grocery Alcoholic Drinks Specialists Mixed Retailers Department Stores Mass Merchandisers Variety Stores Warehouse Clubs Non-Store Retailing - Direct Selling - Homeshopping - E-Commerce - Vending Total	specialists Independent Small Grocers Other Grocery
-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------

Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 27Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume2020

% off-trade	Beer	Cider/Perry	RTDs	Spirits	Wine
Store-Based Retailing - Grocery Retailers Modern Grocery Retailers Convenience Stores Discounters Forecourt Retailers Forecourt Retailers Hypermarkets Traditional Grocery Retailers Food/drink/tobacco specialists Independent Small Grocers Other Grocery Retailers Other Grocery Retailers Drugstores/ parapharmacies Other Non-Grocery Alcoholic Drinks		Data rem	oved fror	n sample	



store checks, trade interviews, trade sources

Table 28 Forecast Sales of Alcoholic Drinks by Category: Total Volume 2021-2026

	2021	2022	2023	2024	2025	2026
Beer (million litres) Cider/Perry ('000 litres) RTDs ('000 litres) Spirits ('000 litres) Wine (million litres) Alcoholic Drinks (million litres)		Data	a removed	l from san	nple	

Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 29 Forecast Sales of Alcoholic Drinks by Category: Total Value 2021-2026

KZT bill	ion	2021	2022	2023	2024	2025	2026
Beer Cider/Po RTDs Spirits Wine Alcoholi	erry ic Drinks		Data	removed	from sam	ple	
Source:	Euromonitor International from trade sources	trade association	s, trade press, co	ompany researcl	n, trade interviev	VS,	

Table 30	Forecast Sales of Alcoholic Drinks by Category: % Total Volume Growth 2021-
2026	

% total volume growth	2021/22	2021-26 CAGR	2021/26 Total
Beer Cider/Perry RTDs Spirits Wine Alcoholic Drinks	Data	a removed from	i sample

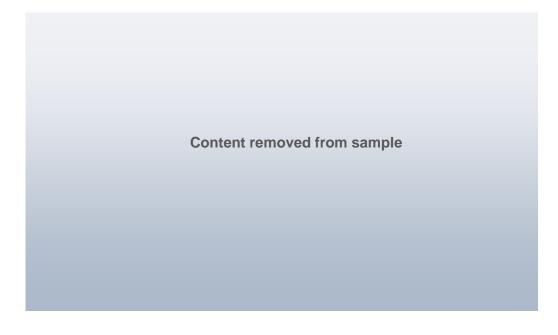
Source: Euromonitor International from trade associations, trade press, company research, trade interviews, trade sources

Table 31 Forecast Sales of Alcoholic Drinks by Category: % Total Value Growth 2021-2026

% local currency, constant value growth

		2021/20	22 2021-26 C	AGR 2021	26 Total
Beer Cider/P RTDs Spirits Wine Alcoholi	erry ic Drinks	C)ata removec	l from samp	le
Source:	Euromonitor International from trade asso trade sources	ciations, trade press, compa	ny research, trade inte	erviews,	

DISCLAIMER

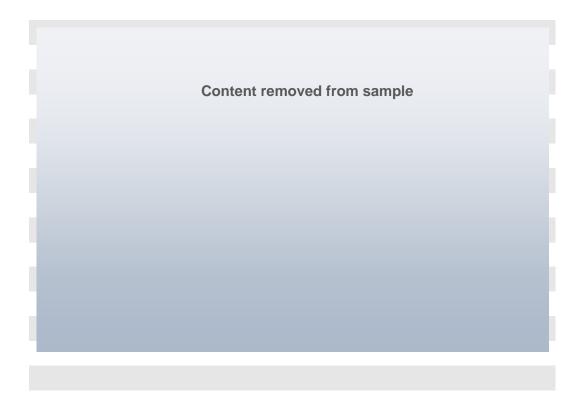


SOURCES

Sources used during the research included the following:

Summary 2 Research Sources





Source: Euromonitor International