



# Tea in Kazakhstan

December 2025

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## Tea in Kazakhstan - Category analysis

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#### 2025 DEVELOPMENTS

Tea's maturity dampens volume growth

#### INDUSTRY PERFORMANCE

Profit margins squeezed, with minimal volume growth

Fruit/herbal tea gains most value share

#### WHAT'S NEXT?

Minimal volume growth over forecast period, as black tea is in decline

High price sensitivity over forecast period

Fruit/herbal tea performs strongly

#### COMPETITIVE LANDSCAPE

RG Brands continues to lead

Smaller player Mai Kompanya gains most value share

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Small local grocers dominate, but bigger grocery retailers steal value share

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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

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## CHANNELS

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