



Euromonitor
International

Cigarettes in Kazakhstan

June 2025

Table of Contents

KEY DATA FINDINGS

2024 DEVELOPMENTS

Cigarettes see continued decline in demand, as consumers shift towards nicotine alternatives
JTI holds lead while KT&G sees dynamic performance
Traditional grocers still dominate, but modern trade gains ground

PROSPECTS AND OPPORTUNITIES

Capsule cigarettes to lead innovation in declining market
Price shifts to drive upgrading and expansion of illicit trade
Flavour innovation will help brands stand out in a declining market

TAXATION AND PRICING

Taxation rates
Average cigarette pack price breakdown
Summary 1 - Average Cigarette Pack Price Breakdown: Brand Examples

CATEGORY DATA

- Table 1 - Sales of Cigarettes: Volume 2019-2024
- Table 2 - Sales of Cigarettes by Category: Value 2019-2024
- Table 3 - Sales of Cigarettes: % Volume Growth 2019-2024
- Table 4 - Sales of Cigarettes by Category: % Value Growth 2019-2024
- Table 5 - Sales of Cigarettes by Blend: % Volume 2019-2024
- Table 6 - Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2019-2024
- Table 7 - Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2019-2024
- Table 8 - Sales of Cigarettes by Pack Size: % Volume 2019-2024
- Table 9 - Sales of Cigarettes by Price Band: % Volume 2019-2024
- Table 10 - NBO Company Shares of Cigarettes: % Volume 2020-2024
- Table 11 - LBN Brand Shares of Cigarettes: % Volume 2021-2024
- Table 12 - Sales of Cigarettes by Distribution Format: % Volume 2019-2024
- Table 13 - Illicit Trade Estimate of Cigarettes: Volume 2019-2024
- Table 14 - Forecast Sales of Cigarettes: Volume 2024-2029
- Table 15 - Forecast Sales of Cigarettes by Category: Value 2024-2029
- Table 16 - Forecast Sales of Cigarettes: % Volume Growth 2024-2029
- Table 17 - Forecast Sales of Cigarettes by Category: % Value Growth 2024-2029
- Table 18 - Forecast Sales of Cigarettes by Blend: % Volume 2024-2029
- Table 19 - Forecast Sales of Cigarettes by Standard/Menthol/Capsule: % Volume 2024-2029
- Table 20 - Forecast Sales of Cigarettes by Regular/Slim/Superslim/Microslim: % Volume 2024-2029
- Table 21 - Forecast Sales of Cigarettes by Pack Size: % Volume 2024-2029
- Table 22 - Forecast Sales of Cigarettes by Price Band: % Volume 2024-2029

EXECUTIVE SUMMARY

Tobacco in 2024: The big picture
2024 key trends
Competitive landscape
Retail developments
What next for tobacco?

OPERATING ENVIRONMENT

Legislation

Legislative overview

Summary 2 - 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

MARKET INDICATORS

Table 23 - Number of Adult Smokers by Gender 2019-2024

MARKET DATA

Table 24 - Sales of Tobacco by Category: Volume 2019-2024

Table 25 - Sales of Tobacco by Category: Value 2019-2024

Table 26 - Sales of Tobacco by Category: % Volume Growth 2019-2024

Table 27 - Sales of Tobacco by Category: % Value Growth 2019-2024

Table 28 - Forecast Sales of Tobacco by Category: Volume 2024-2029

Table 29 - Forecast Sales of Tobacco by Category: Value 2024-2029

Table 30 - Forecast Sales of Tobacco by Category: % Volume Growth 2024-2029

Table 31 - Forecast Sales of Tobacco by Category: % Value Growth 2024-2029

DISCLAIMER

SOURCES

Summary 3 - Research Sources

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/cigarettes-in-kazakhstan/report.