



Passport

RTDs in Kazakhstan

Euromonitor International

July 2022

This sample report is for illustration
purposes only.

Some content and data have been
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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

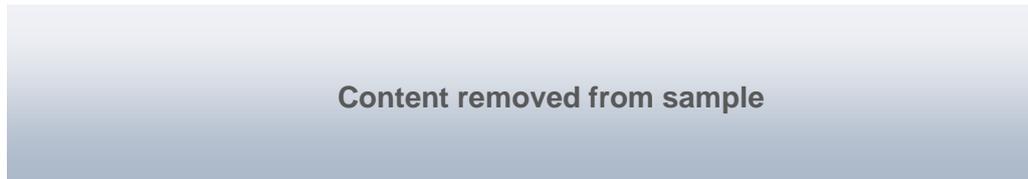
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RTDs faces strong competition

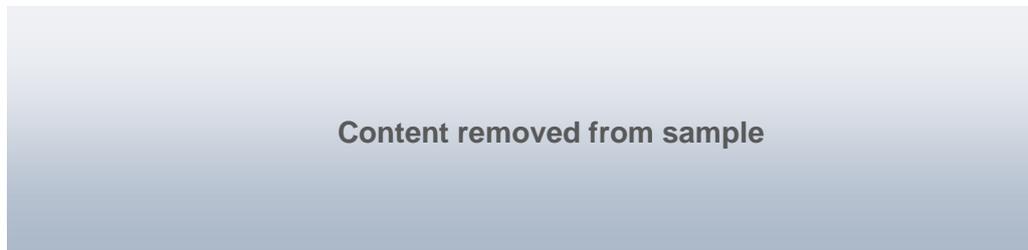
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PROSPECTS AND OPPORTUNITIES

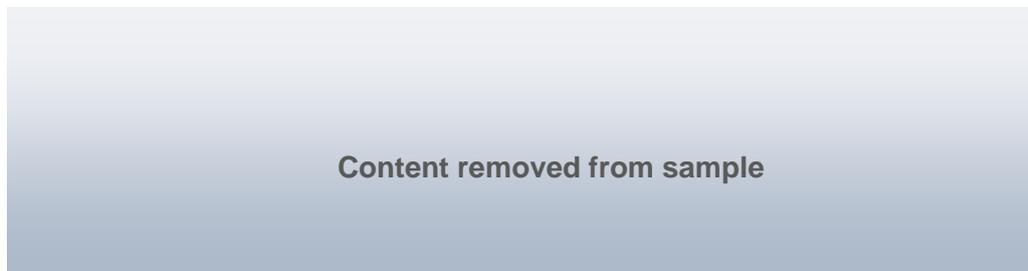
RTD sales expected to show moderate growth



Foreign trend to watch



Healthier ingredients and fresh tastes offer A way to go



CATEGORY DATA

Table 1 Sales of RTDs by Category: Total Volume 2016-2021

'000 litres

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|-------------------|--------------------------|------|------|------|------|------|
| Malt-based RTDs | Data removed from sample | | | | | |
| Spirit-based RTDs | | | | | | |
| Wine-based RTDs | | | | | | |
| Other RTDs | | | | | | |
| RTDs | | | | | | |

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 billion | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|-------------------|---------------------------------|------|------|------|------|------|
| Malt-based RTDs | Data removed from sample | | | | | |
| Spirit-based RTDs | | | | | | |
| Wine-based RTDs | | | | | | |
| Other RTDs | | | | | | |
| RTDs | | | | | | |

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

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

| % total volume growth | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|-----------------------|---------------------------------|--------------|---------------|
| Malt-based RTDs | Data removed from sample | | |
| Spirit-based RTDs | | | |
| Wine-based RTDs | | | |
| Other RTDs | | | |
| RTDs | | | |

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

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 |
|--|---------------------------------|--------------|---------------|
| Malt-based RTDs | Data removed from sample | | |
| Spirit-based RTDs | | | |
| Wine-based RTDs | | | |
| Other RTDs | | | |
| RTDs | | | |

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

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

| '000 litres | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|-------------|---------------------------------|------|------|------|------|------|
| Off-trade | Data removed from sample | | | | | |
| On-trade | | | | | | |
| Total | | | | | | |

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

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

KZT billion

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|-----------|---------------------------------|------|------|------|------|------|
| Off-trade | Data removed from sample | | | | | |
| On-trade | | | | | | |
| Total | | | | | | |

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

Table 7 Sales of RTDs by Off-trade vs On-trade: % Volume Growth 2016-2021

% volume growth

| | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|-----------|---------------------------------|--------------|---------------|
| Off-trade | Data removed from sample | | |
| On-trade | | | |
| Total | | | |

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

Table 8 Sales of RTDs by Off-trade vs On-trade: % Value Growth 2016-2021

% current value growth

| | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|-----------|---------------------------------|--------------|---------------|
| Off-trade | Data removed from sample | | |
| On-trade | | | |
| Total | | | |

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

Table 9 GBO Company Shares of RTDs: % Total Volume 2017-2021

% total volume

| Company | 2017 | 2018 | 2019 | 2020 | 2021 |
|---------|---------------------------------|------|------|------|------|
| | Data removed from sample | | | | |

Data removed from sample

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

Table 10 NBO Company Shares of RTDs: % Total Volume 2017-2021

% total volume

| Company | 2017 | 2018 | 2019 | 2020 | 2021 |
|---------|---------------------------------|------|------|------|------|
| | Data removed from sample | | | | |

Data removed from sample

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

Table 11 LBN Brand Shares of RTDs: % Total Volume 2018-2021

| % total volume Brand (Global Brand Owner) | Company | 2018 | 2019 | 2020 | 2021 |
|---|---------|------|------|------|------|
|---|---------|------|------|------|------|

Data removed from sample

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 | Data removed from sample | | | | | |
| Spirit-based RTDs | | | | | | |
| Wine-based RTDs | | | | | | |
| Other RTDs | | | | | | |
| RTDs | | | | | | |

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

Table 13 Forecast Sales of RTDs by Category: Total Value 2021-2026

| KZT billion | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|-------------|------|------|------|------|------|------|
|-------------|------|------|------|------|------|------|

| | | | | | | |
|-------------------|---------------------------------|--|--|--|--|--|
| Malt-based RTDs | Data removed from sample | | | | | |
| Spirit-based RTDs | | | | | | |
| Wine-based RTDs | | | | | | |
| 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 | Data removed from sample | | |
| Spirit-based RTDs | | | |
| Wine-based RTDs | | | |
| Other RTDs | | | |
| RTDs | | | |

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

Table 15 Forecast Sales of RTDs by Category: % Total Value Growth 2021-2026

% local currency, constant value growth

| | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|-------------------|---------------------------------|--------------|---------------|
| Malt-based RTDs | Data removed from sample | | |
| Spirit-based RTDs | | | |
| Wine-based RTDs | | | |
| Other RTDs | | | |
| RTDs | | | |

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

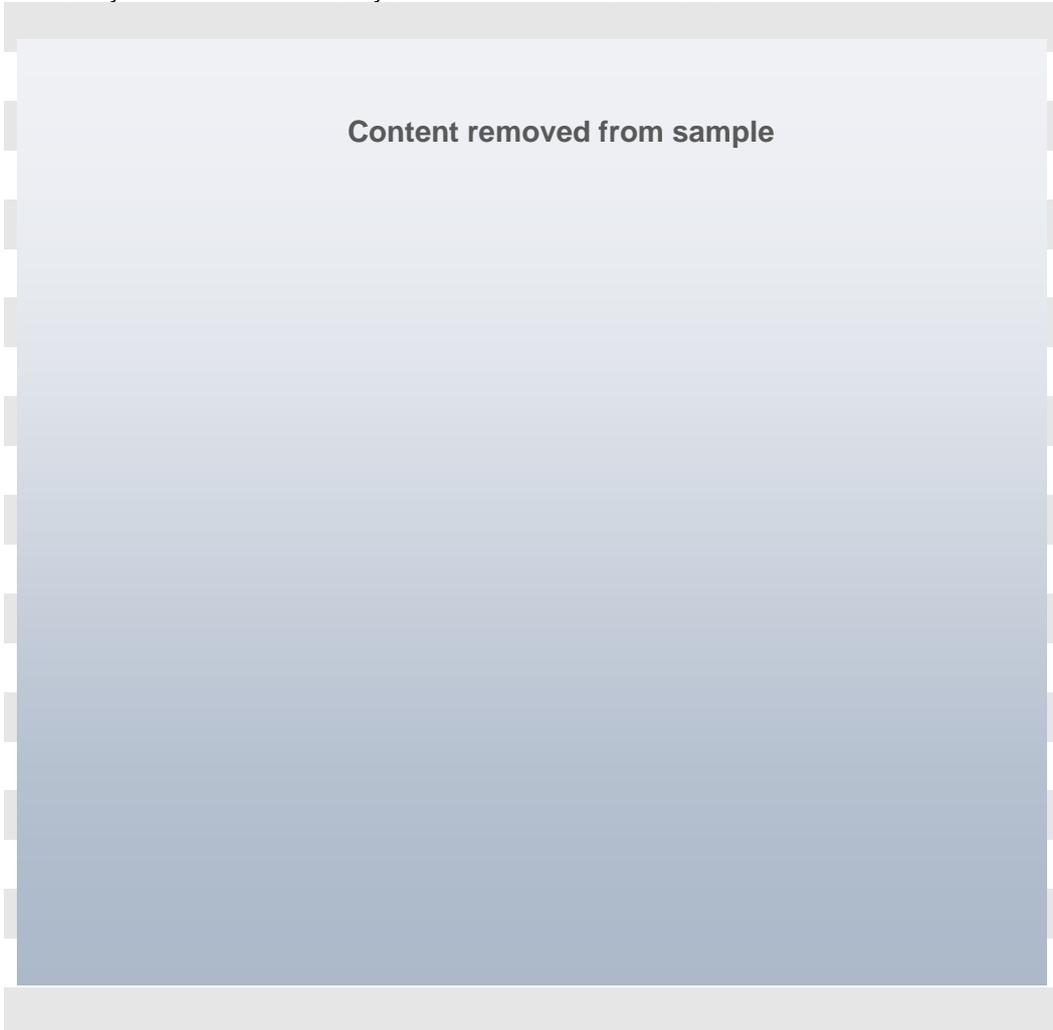
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On-trade establishments

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- There have been no changes to taxation and duty levies in 2021.

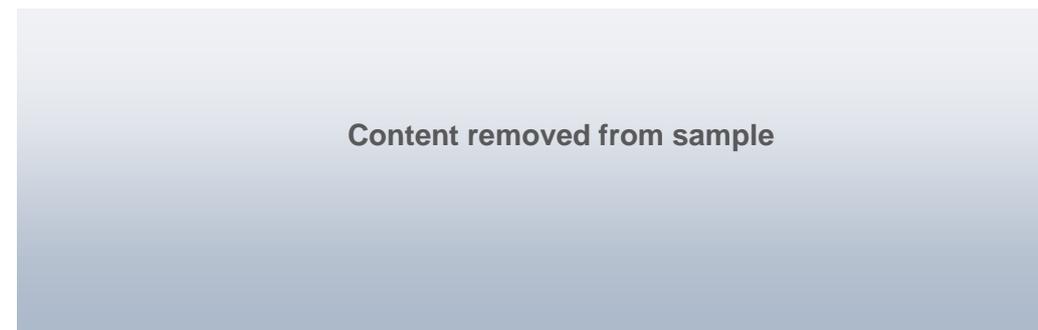
Summary 1 Taxation and Duty Levies on Alcoholic Drinks 2021



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

Table 16 Retail Consumer Expenditure on Alcoholic Drinks 2016-2021

KZT million

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|-------|--------------------------|------|------|------|------|------|
| Total | Data removed from sample | | | | | |

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

Note: 2021 data is forecast

MARKET DATA

Table 17 Sales of Alcoholic Drinks by Category: Total Volume 2016-2021

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|-----------------------------------|--------------------------|------|------|------|------|------|
| Beer (million litres) | Data removed from sample | | | | | |
| Cider/Perry ('000 litres) | Data removed from sample | | | | | |
| RTDs ('000 litres) | Data removed from sample | | | | | |
| Spirits ('000 litres) | Data removed from sample | | | | | |
| Wine (million litres) | Data removed from sample | | | | | |
| Alcoholic Drinks (million litres) | Data removed from sample | | | | | |

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

Table 18 Sales of Alcoholic Drinks by Category: Total Value 2016-2021

KZT billion

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|------------------|--------------------------|------|------|------|------|------|
| Beer | Data removed from sample | | | | | |
| Cider/Perry | Data removed from sample | | | | | |
| RTDs | Data removed from sample | | | | | |
| Spirits | Data removed from sample | | | | | |
| Wine | Data removed from sample | | | | | |
| Alcoholic Drinks | Data removed from sample | | | | | |

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

Table 19 Sales of Alcoholic Drinks by Category: % Total Volume Growth 2016-2021

% total volume growth

| | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|-------------|--------------------------|--------------|---------------|
| Beer | Data removed from sample | | |
| Cider/Perry | Data removed from sample | | |
| RTDs | Data removed from sample | | |
| Spirits | Data removed from sample | | |
| Wine | Data removed from sample | | |

Data removed from sample

Alcoholic Drinks

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

Table 20 Sales of Alcoholic Drinks by Category: % Total Value Growth 2016-2021

% local currency, current value growth

| | 2020/21 | 2016-21 CAGR | 2016/21 Total |
|------------------|---------------------------------|--------------|---------------|
| Beer | Data removed from sample | | |
| Cider/Perry | | | |
| RTDs | | | |
| Spirits | | | |
| Wine | | | |
| Alcoholic Drinks | | | |

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

Table 21 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Volume 2021

| | Off-trade | On-trade | Total |
|-----------------------------------|---------------------------------|----------|-------|
| Beer (million litres) | Data removed from sample | | |
| Cider/Perry ('000 litres) | | | |
| RTDs ('000 litres) | | | |
| Spirits ('000 litres) | | | |
| Wine (million litres) | | | |
| Alcoholic Drinks (million litres) | | | |

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

Table 22 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: Value 2021

| | Off-trade | On-trade | Total |
|------------------|---------------------------------|----------|-------|
| Beer | Data removed from sample | | |
| Cider/Perry | | | |
| RTDs | | | |
| Spirits | | | |
| Wine | | | |
| Alcoholic Drinks | | | |

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

Table 23 Sales of Alcoholic Drinks by Category by Off-trade vs On-trade: % Volume 2021

| | Off-trade | On-trade | Total |
|-------------|---------------------------------|----------|-------|
| Beer | Data removed from sample | | |
| Cider/Perry | | | |

RTDs
Spirits
Wine
Alcoholic Drinks

Data removed from sample

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

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

% value analysis

| | Off-trade | On-trade | Total |
|------------------|---------------------------------|----------|-------|
| Beer | Data removed from sample | | |
| Cider/Perry | | | |
| RTDs | | | |
| Spirits | | | |
| Wine | | | |
| Alcoholic Drinks | | | |

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 |
|---------|---------------------------------|------|------|------|------|
| | Data removed from sample | | | | |

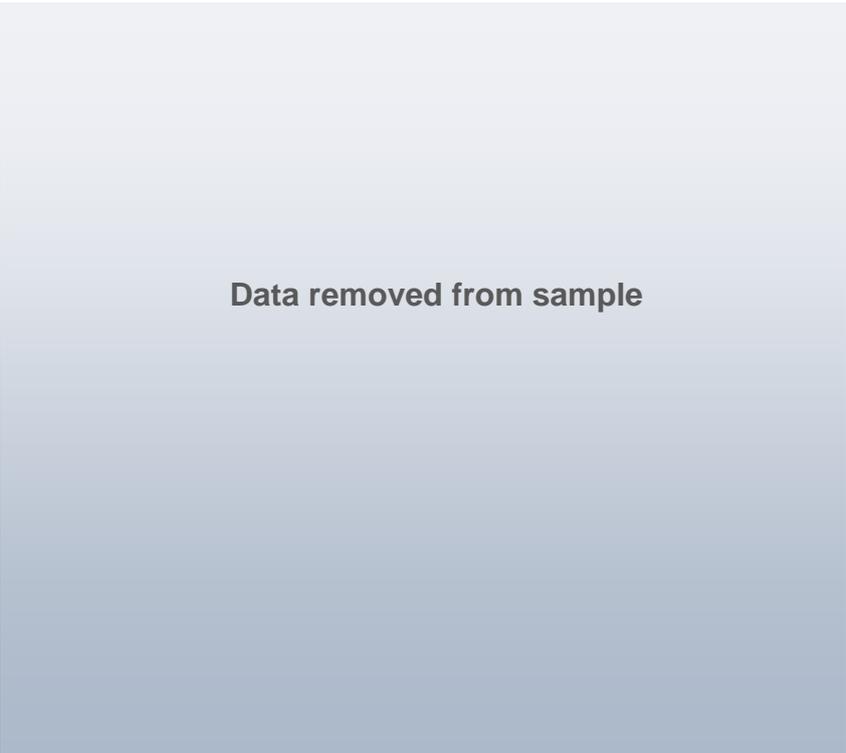
Source: Euromonitor International from official statistics, trade associations, trade press, company research, store checks, trade interviews, trade sources

Table 26 Distribution of Alcoholic Drinks by Format: % Off-trade Value 2016-2021

% off-trade

| | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 |
|-----------------------------|---------------------------------|------|------|------|------|------|
| Store-Based Retailing | Data removed from sample | | | | | |
| - Grocery Retailers | | | | | | |
| -- Modern Grocery Retailers | | | | | | |
| --- Convenience Stores | | | | | | |
| --- Discounters | | | | | | |

- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Food/drink/tobacco specialists
- Independent Small Grocers
- Other Grocery Retailers
- Non-Grocery Specialists
- 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



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

Table 27 **Distribution of Alcoholic Drinks by Format and by Category: % Off-trade Volume 2020**

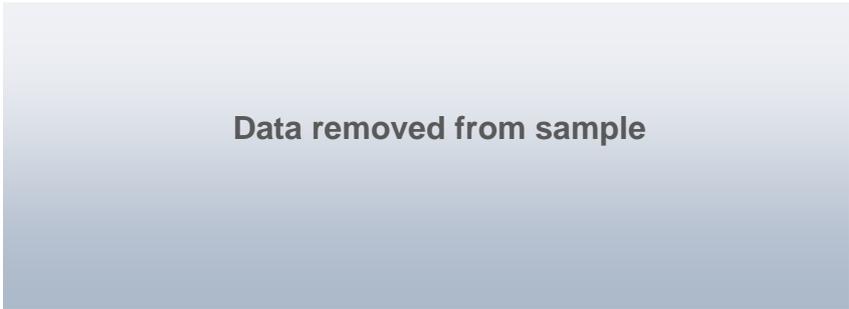
% off-trade

- Store-Based Retailing
- Grocery Retailers
- Modern Grocery Retailers
- Convenience Stores
- Discounters
- Forecourt Retailers
- Hypermarkets
- Supermarkets
- Traditional Grocery Retailers
- Food/drink/tobacco specialists
- Independent Small Grocers
- Other Grocery Retailers
- Non-Grocery Specialists
- Drugstores/parapharmacies
- Other Non-Grocery Alcoholic Drinks

Beer Cider/Perry RTDs Spirits Wine



- Specialists
- Mixed Retailers
- Department Stores
- Mass Merchandisers
- Variety Stores
- Warehouse Clubs
- Non-Store Retailing
- Direct Selling
- Homeshopping
- E-Commerce
- Vending
- Total



Source: Euromonitor International from official statistics, trade associations, trade press, company research, 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) | Data removed from sample | | | | | |
| Cider/Perry ('000 litres) | | | | | | |
| RTDs ('000 litres) | | | | | | |
| Spirits ('000 litres) | | | | | | |
| Wine (million litres) | | | | | | |
| Alcoholic Drinks (million litres) | | | | | | |
| | | | | | | |

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 billion | 2021 | 2022 | 2023 | 2024 | 2025 | 2026 |
|------------------|---------------------------------|------|------|------|------|------|
| Beer | Data removed from sample | | | | | |
| Cider/Perry | | | | | | |
| RTDs | | | | | | |
| Spirits | | | | | | |
| Wine | | | | | | |
| Alcoholic Drinks | | | | | | |
| | | | | | | |

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

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 | Data removed from sample | | |
| Cider/Perry | | | |
| RTDs | | | |
| Spirits | | | |
| Wine | | | |
| Alcoholic Drinks | | | |

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

| | 2021/2022 | 2021-26 CAGR | 2021/26 Total |
|------------------|---------------------------------|--------------|---------------|
| Beer | Data removed from sample | | |
| Cider/Perry | | | |
| RTDs | | | |
| Spirits | | | |
| Wine | | | |
| Alcoholic Drinks | | | |

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

DISCLAIMER

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SOURCES

Sources used during the research included the following:

Summary 2 Research Sources

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Source: Euromonitor International