



# Retail Tissue in Kazakhstan

April 2026

Table of Contents

## KEY DATA INSIGHTS

### 2025 DEVELOPMENTS

Retail Tissue Summary

### KEY INDUSTRY TRENDS

Chart 1 - Key Industry Trends for Retail Tissue

### INDUSTRY PERFORMANCE

Bulk Pack Adoption Grows as Shoppers Seek Value

Chart 2 - Familia Boosts Affordability in Retail Tissue

Major Brands Enhance Comfort and Convenience without a Price Premium

Chart 3 - Flovell Care Delivers Comfort at an Affordable Price

Chart 4 - Value Sales 2020-2030

Chart 5 - Volume Sales 2020-2030

Chart 6 - Value Sales by Category 2025

### WHAT'S NEXT?

Local Producers Set to Capture Share as Affordability Reshapes Buying Habits

Toilet Paper Extends Lead as Multipacks and Value Formats Drive Gains

Digital Channels and Convenience Set to Shape Competitive Strategies

Chart 7 - Forecast Value Sales 2020-2030

Chart 8 - Forecast Value Sales by Category 2025-2030

### COMPETITIVE LANDSCAPE

Karina Trading Maintains Leadership as Value Brands Close the Gap

Chart 9 - Company Shares 2025

Chart 10 - Brand Shares 2025

### CHANNELS

Supermarkets Sustain Dominance as Shoppers Seek Bulk Convenience

Retail E-Commerce Advances Slowly as In-Person Shopping Prevails

Chart 11 - Retail Channels 2020-2025

### ECONOMIC CONTEXT

Chart 12 - Economic Context for Retail Tissue

Chart 13 - Real Gdp Growth 2020-2030

Chart 14 - Inflation 2020-2030

### CONSUMER CONTEXT

Chart 15 - Consumer Context for Retail Tissue

Chart 16 - Population 2020-2030

Chart 17 - Consumer Expenditure 2020-2030

Chart 18 - Population by Generation 2025

### COUNTRY REPORTS DISCLAIMER

Tissue and Hygiene in Kazakhstan - Industry Overview

### EXECUTIVE SUMMARY

2025 Developments

### KEY DATA INSIGHTS

## KEY INDUSTRY TRENDS

Chart 19 - Key Industry Trends for Tissue and Hygiene

## INDUSTRY PERFORMANCE

Brands Push Affordable Innovation as Price Sensitivity Rises

Chart 20 - Eva Pushes High-Quality Affordability

Huggies and Compact Tissue Packs Respond to Demand for Convenience

Chart 21 - Huggies Focuses on Convenience

Consumer Demands for Affordable Sustainability Set New Standards

Chart 22 - Value Sales 2020-2030

Chart 23 - Value Sales by Category 2025

## WHAT'S NEXT?

Rising Living Costs and E-Commerce Set to Reshape Value Strategies

Bulk Tissue Packs and Toilet Paper Expected to Secure Everyday Spending

Ageing Population and Niche Launches Set to Accelerate Adult Incontinence Growth

Chart 24 - Analyst Insight for Tissue and Hygiene

Chart 25 - Forecast Value Sales 2020-2030

Chart 26 - Forecast Value Sales by Category 2025-2030

## COMPETITIVE LANDSCAPE

Karina Trading and Mama Znaet Expand as Global Leaders Face Pressure

Innovative Launches and Digital Strategies Create Growth Openings

Chart 27 - Company Shares 2025

Chart 28 - Brand Shares 2025

## CHANNELS

Supermarkets Consolidate Share as Local Grocers Lose Ground and E-Commerce Grows Steadily

Chart 29 - Retail Channels 2020-2025

## ECONOMIC CONTEXT

Chart 30 - Economic Context for Tissue and Hygiene

Chart 31 - Real Gdp Growth 2020-2030

Chart 32 - Inflation 2020-2030

## CONSUMER CONTEXT

Chart 33 - Consumer Context for Tissue and Hygiene

Chart 34 - Population 2020-2030

Chart 35 - Consumer Expenditure 2020-2030

Chart 36 - Population by Generation 2025

## COUNTRY REPORTS DISCLAIMER

### 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/retail-tissue-in-kazakhstan/report](http://www.euromonitor.com/retail-tissue-in-kazakhstan/report).