

Ситуация на молочном рынке Казахстана



Nov 24, 2025



DAIRY NEWS. TODAY

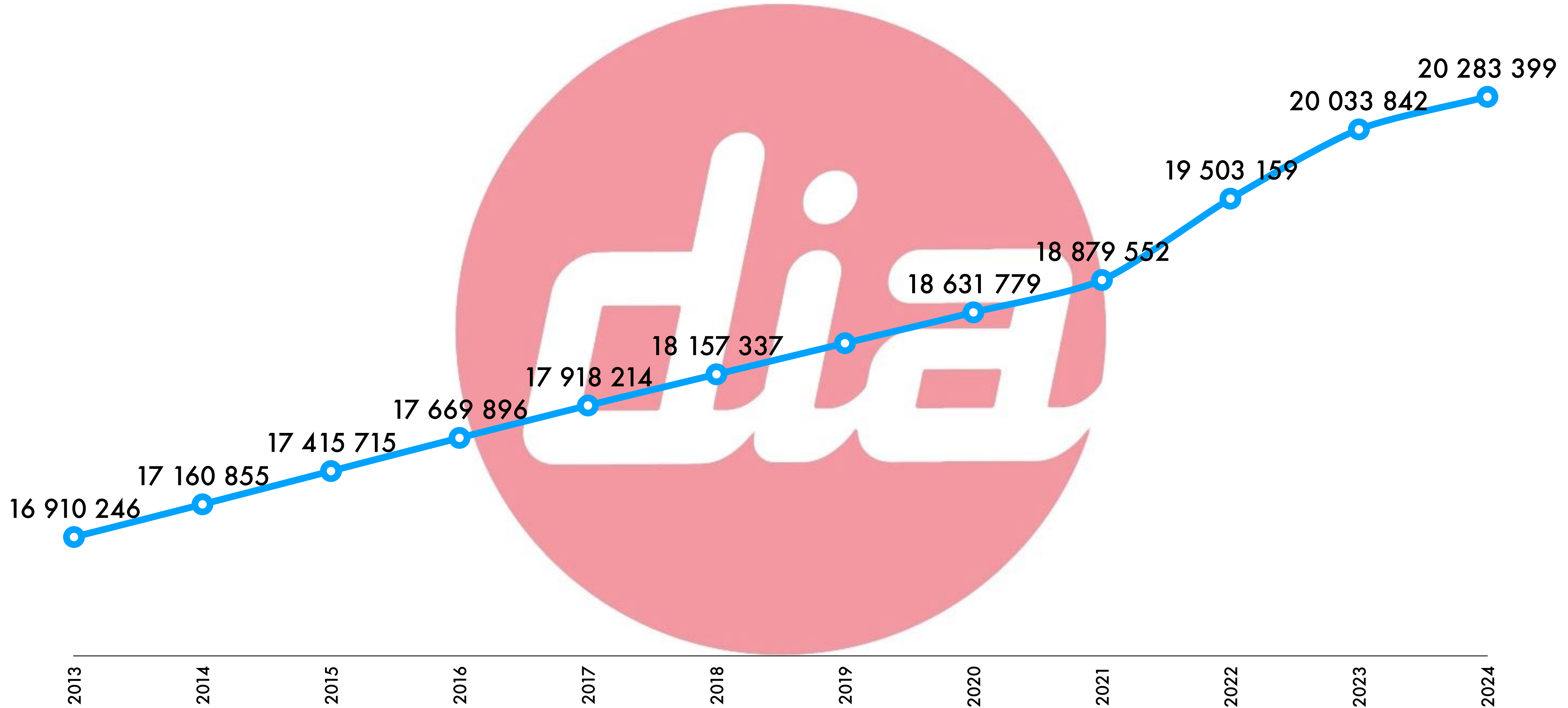


The DairyNews readership exceeds **1.7 million** readers per year



The audience is dairy industry specialists, owners, management, and executives of dairy product manufacturers, dairy farms, and suppliers of technological solutions.

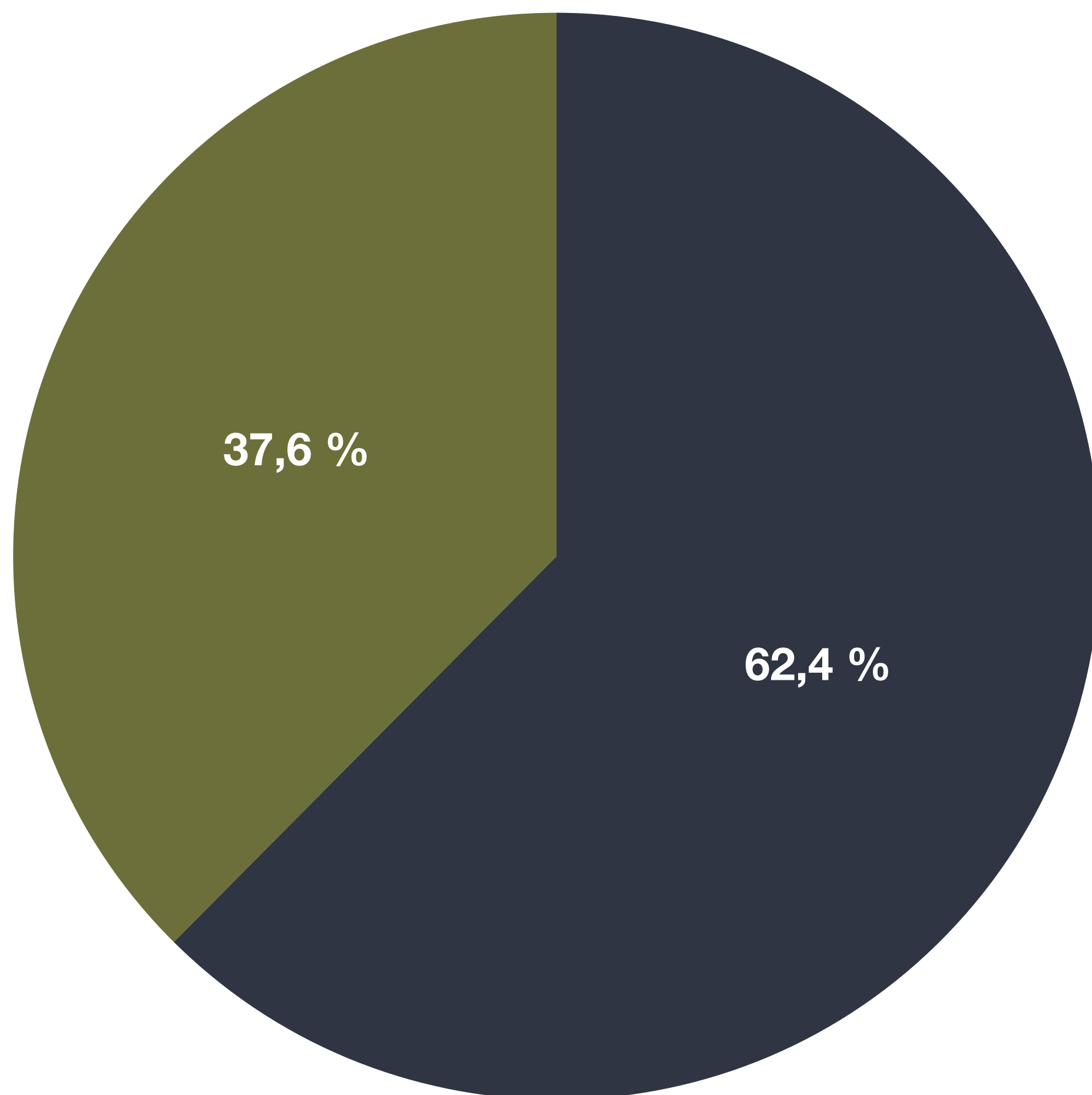
Population



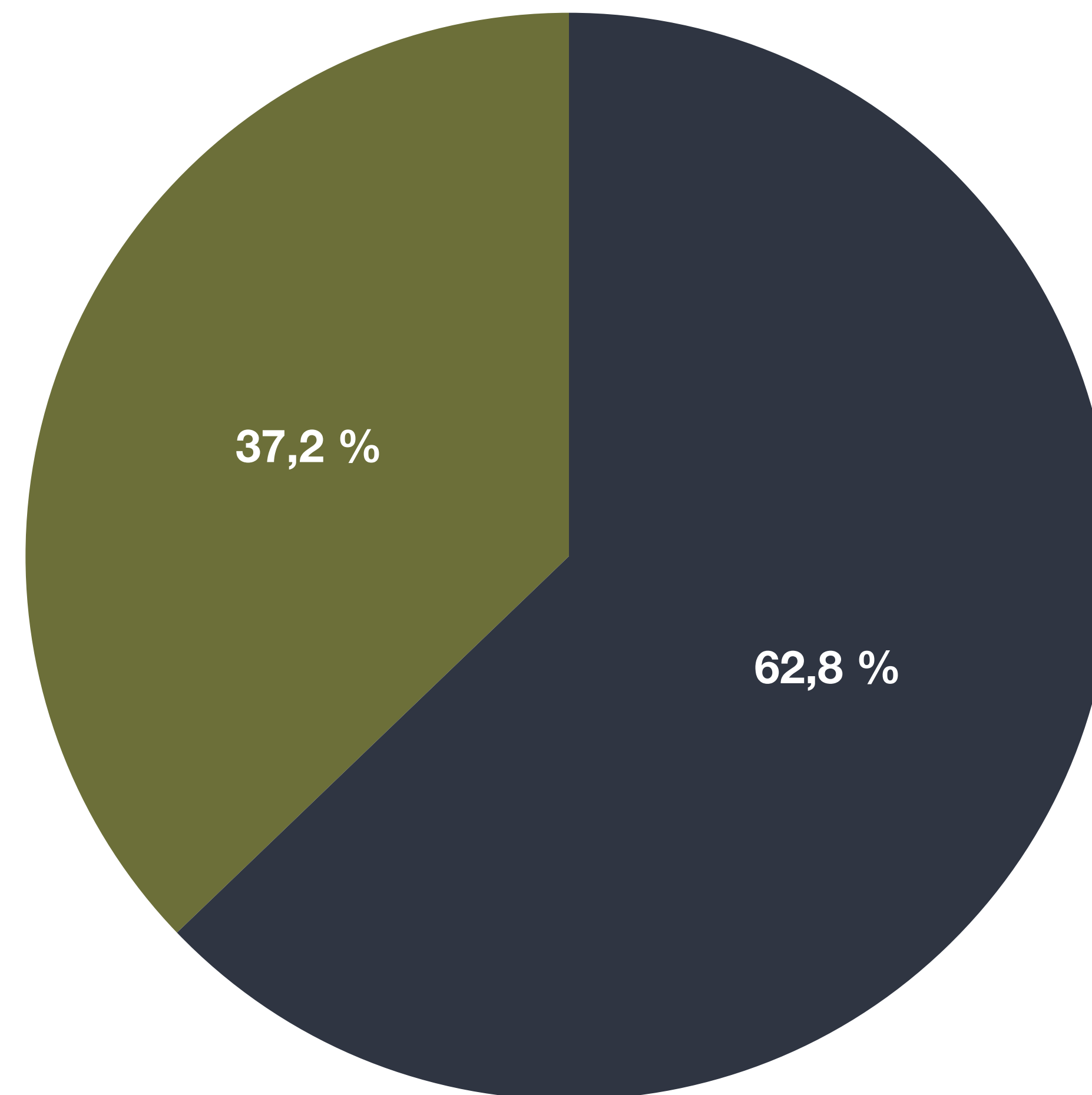
Population

2023: 20 033 842

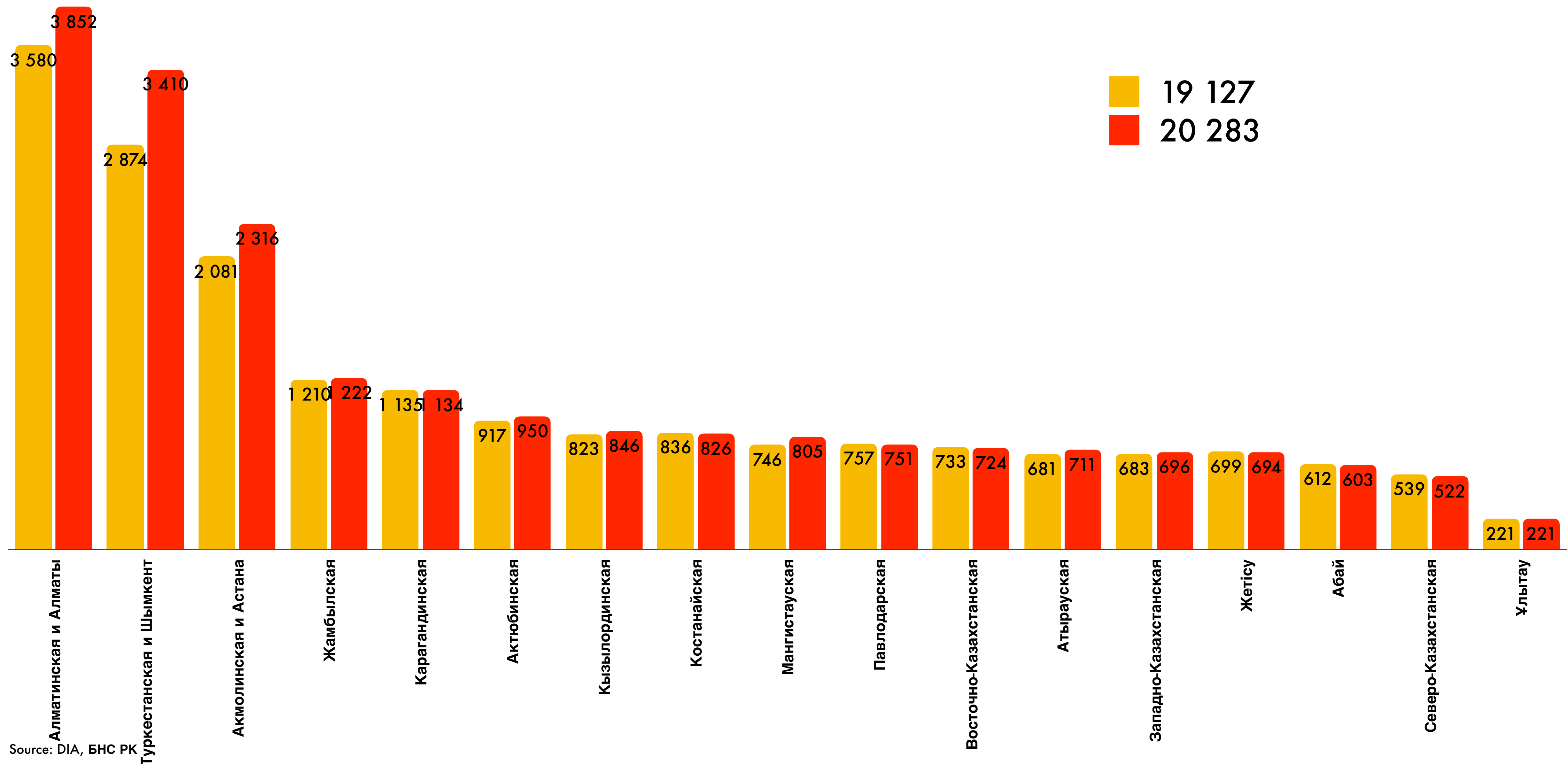
2024: 20 283 399



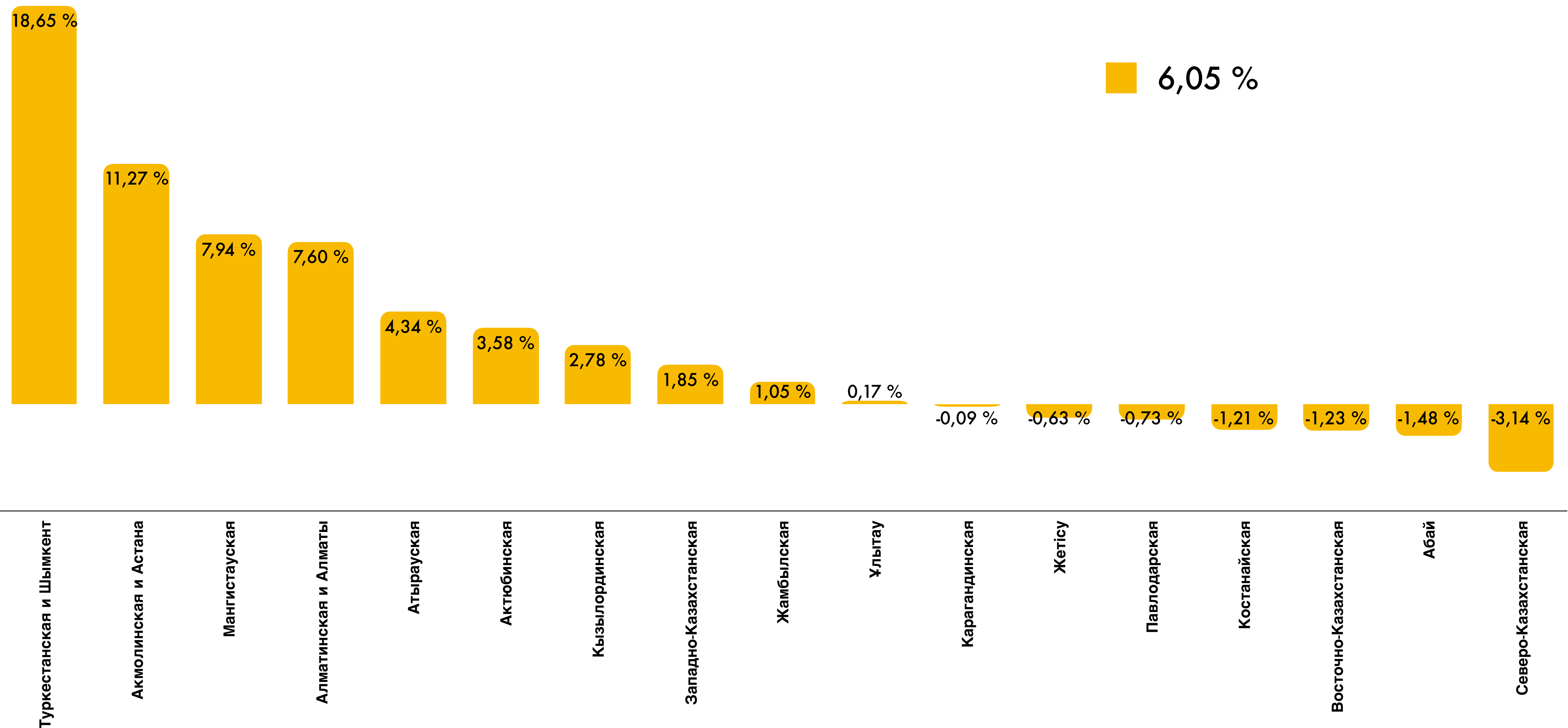
● City
● Rural



Population changing 2022-2024



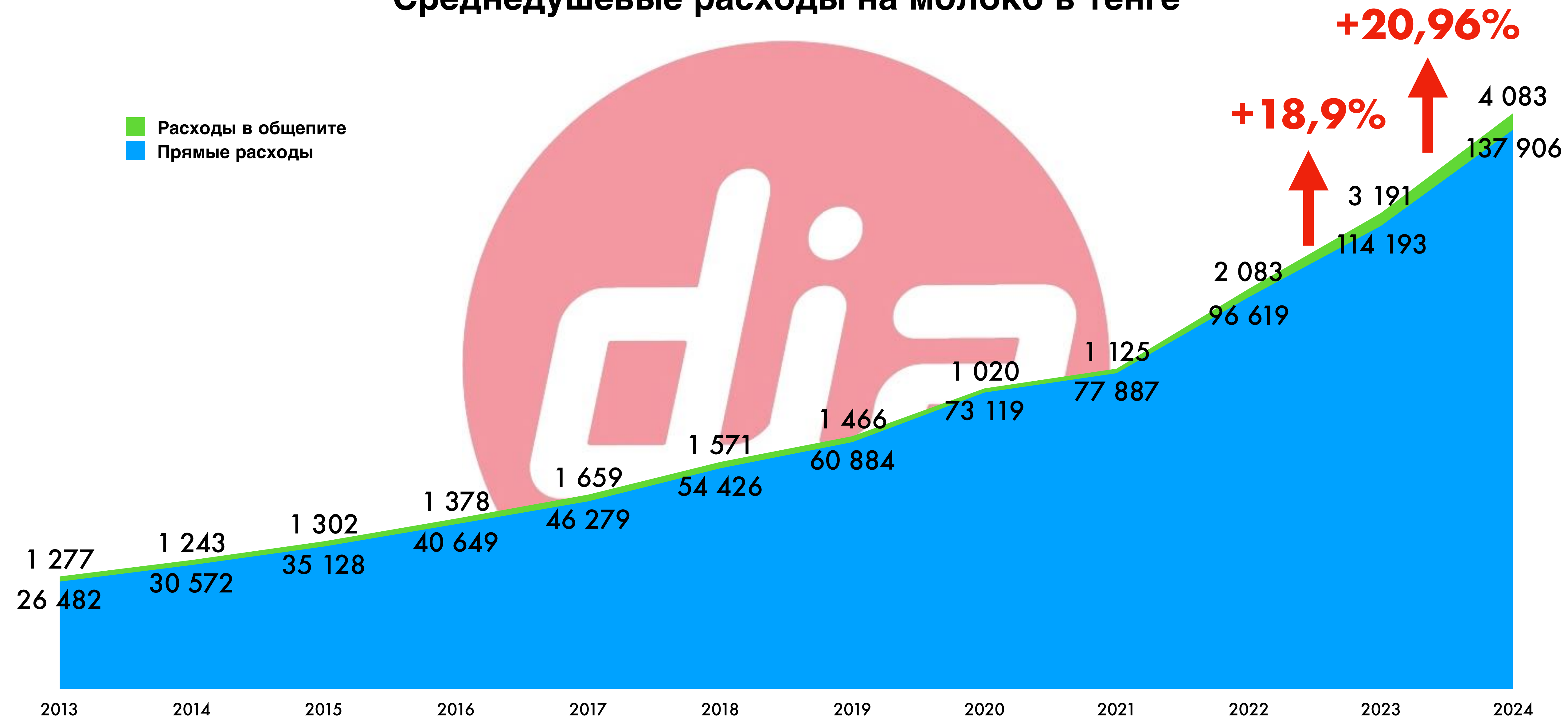
Population changing 2022-2024



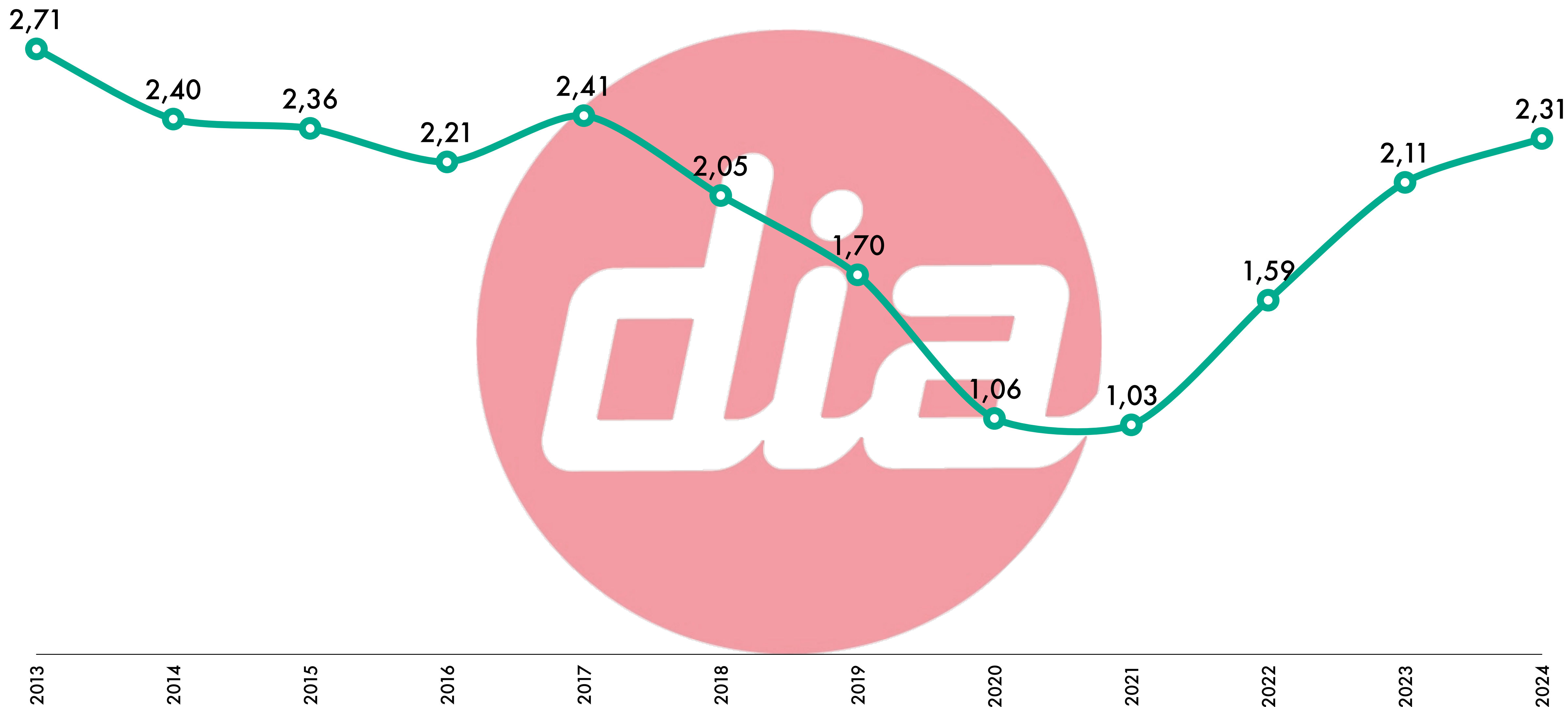
Consumption

Среднедушевые расходы на молоко в тенге

■ Расходы в общепите
■ Прямые расходы

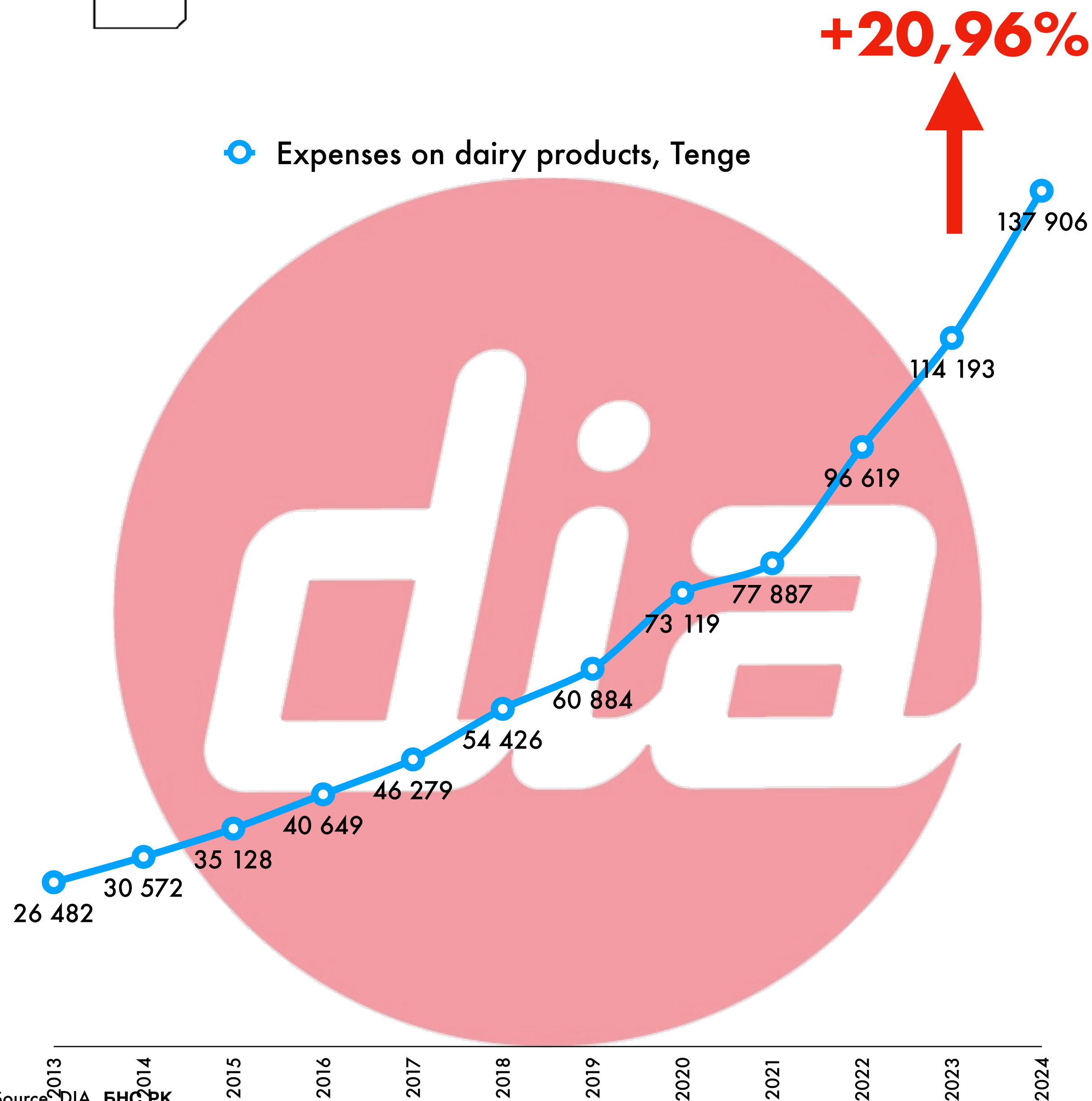


Доля расходов на питание вне дома

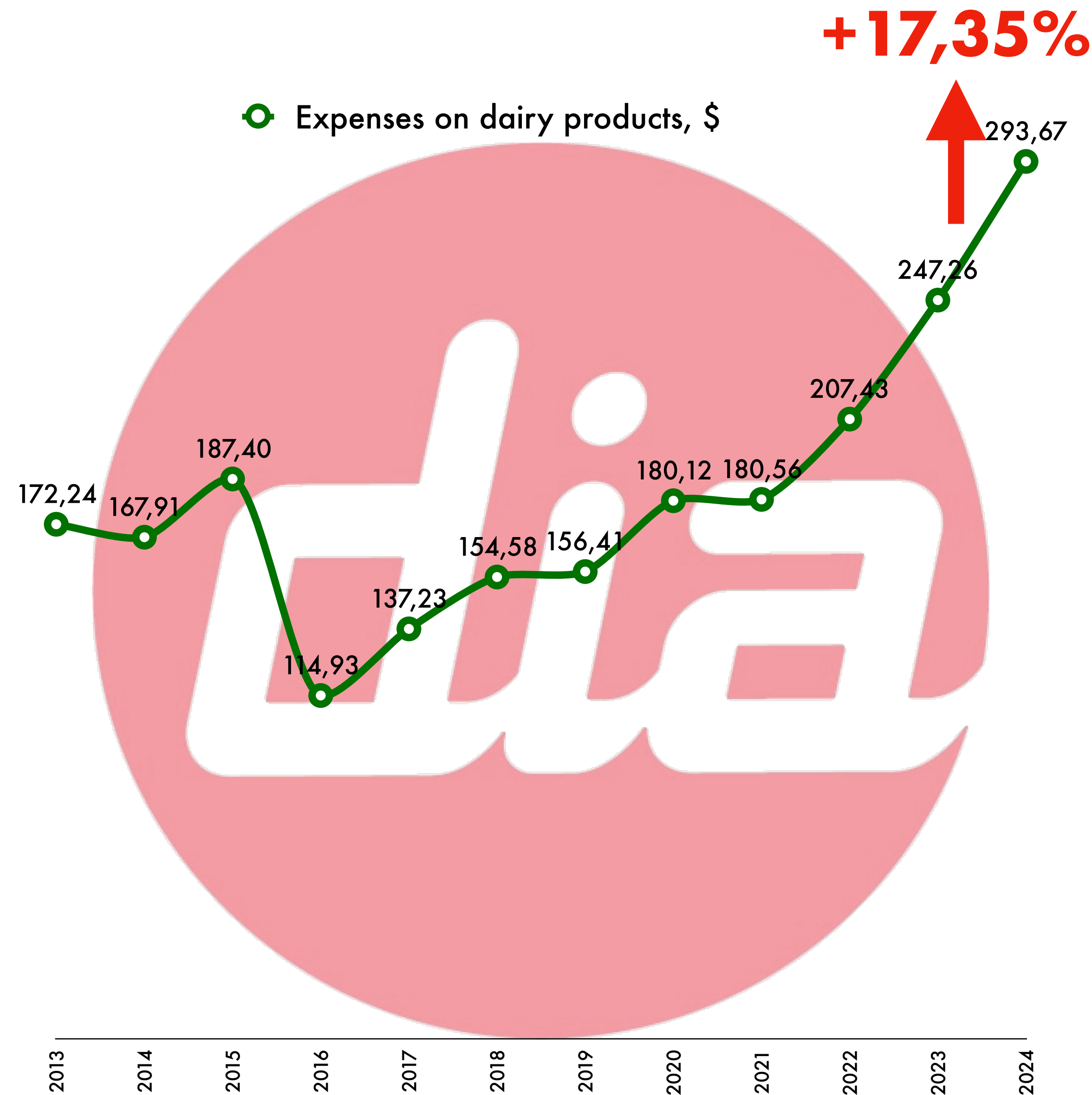


Расходы на молочные продукты

Expenses on dairy products, Tenge



Expenses on dairy products, \$



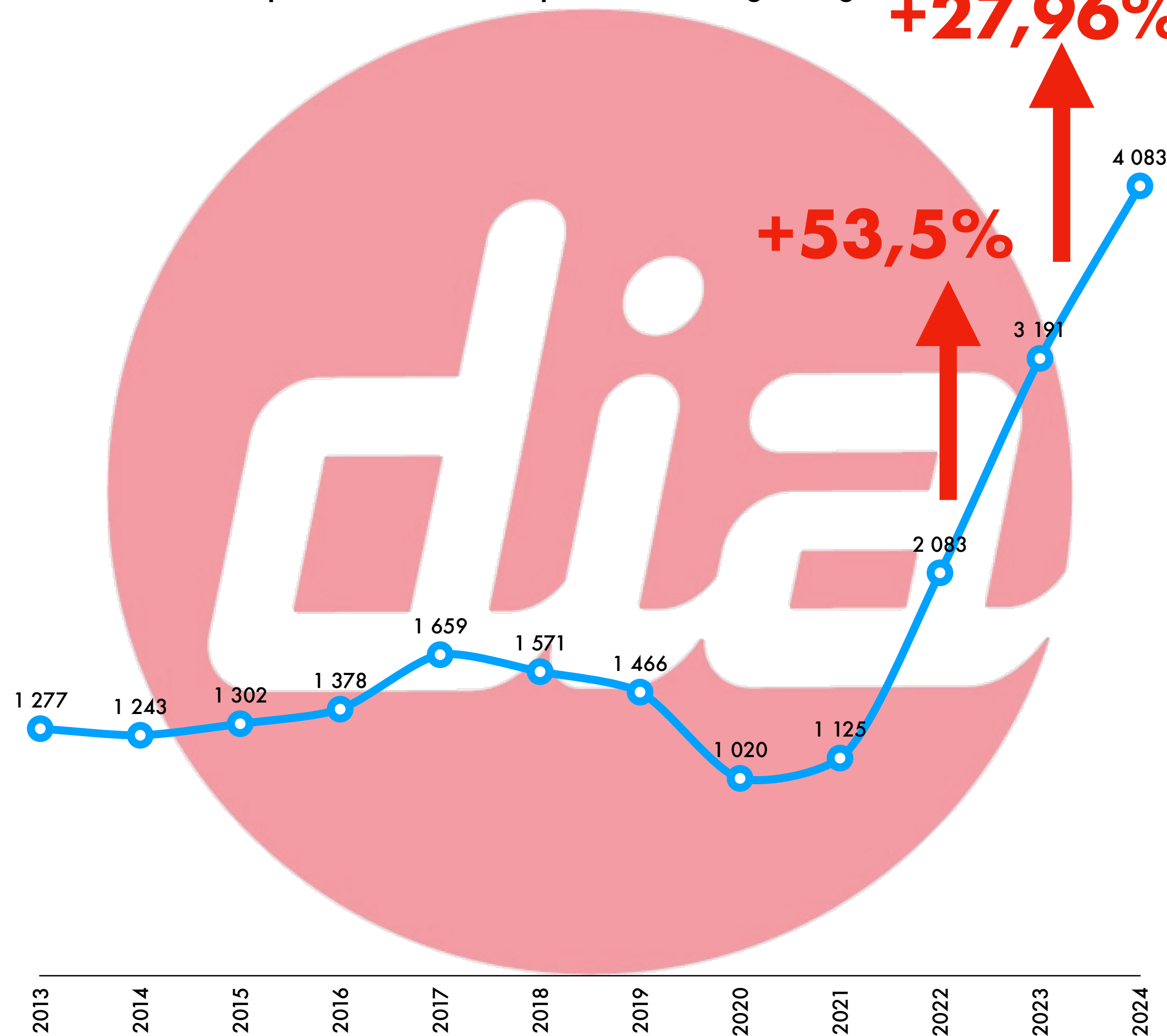
Расходы на молоко в общепите

+24,3%

Expenses for milk in public catering, Tenge

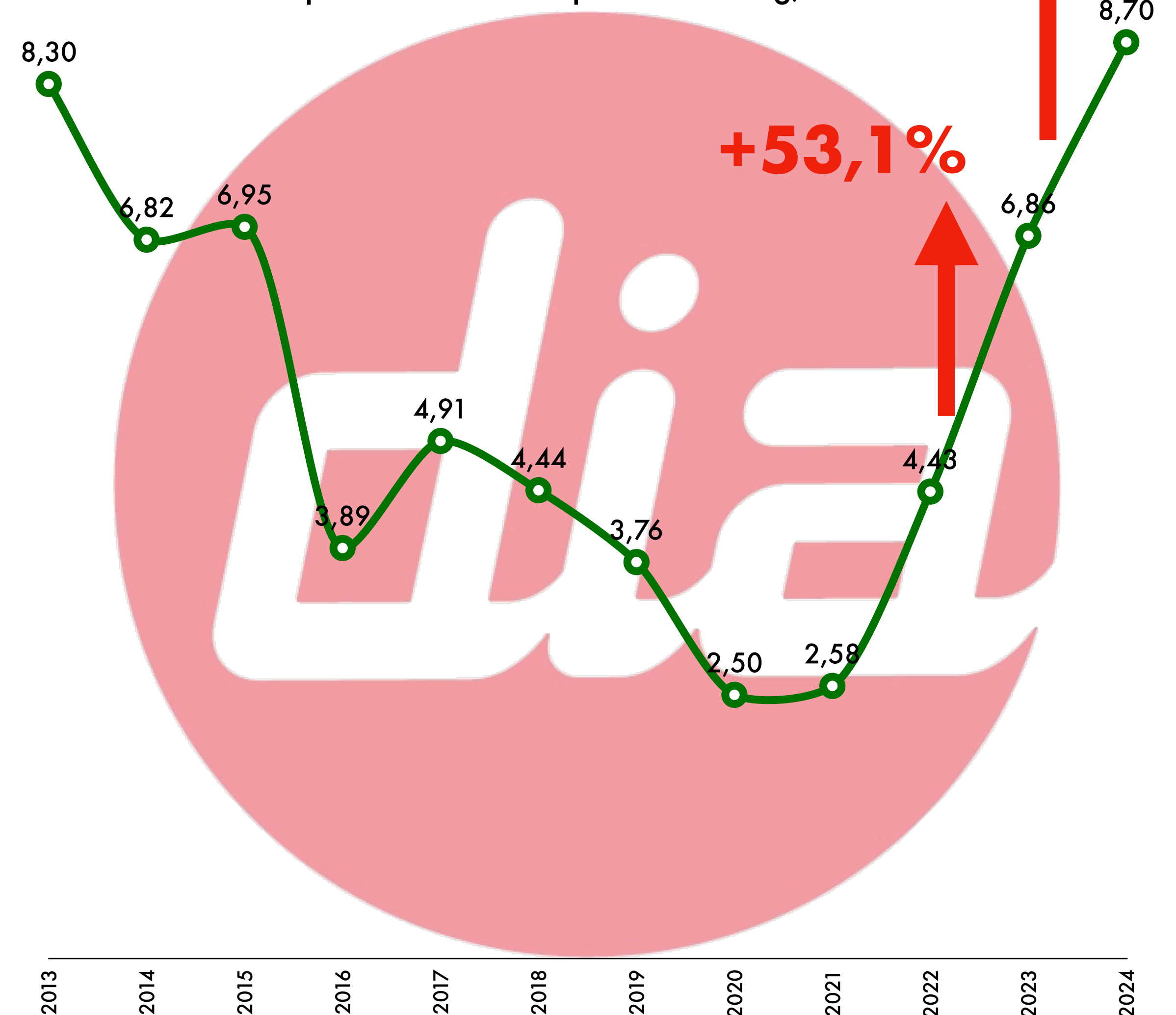
+27,96%

+53,5%



Expenses for milk in public catering, \$

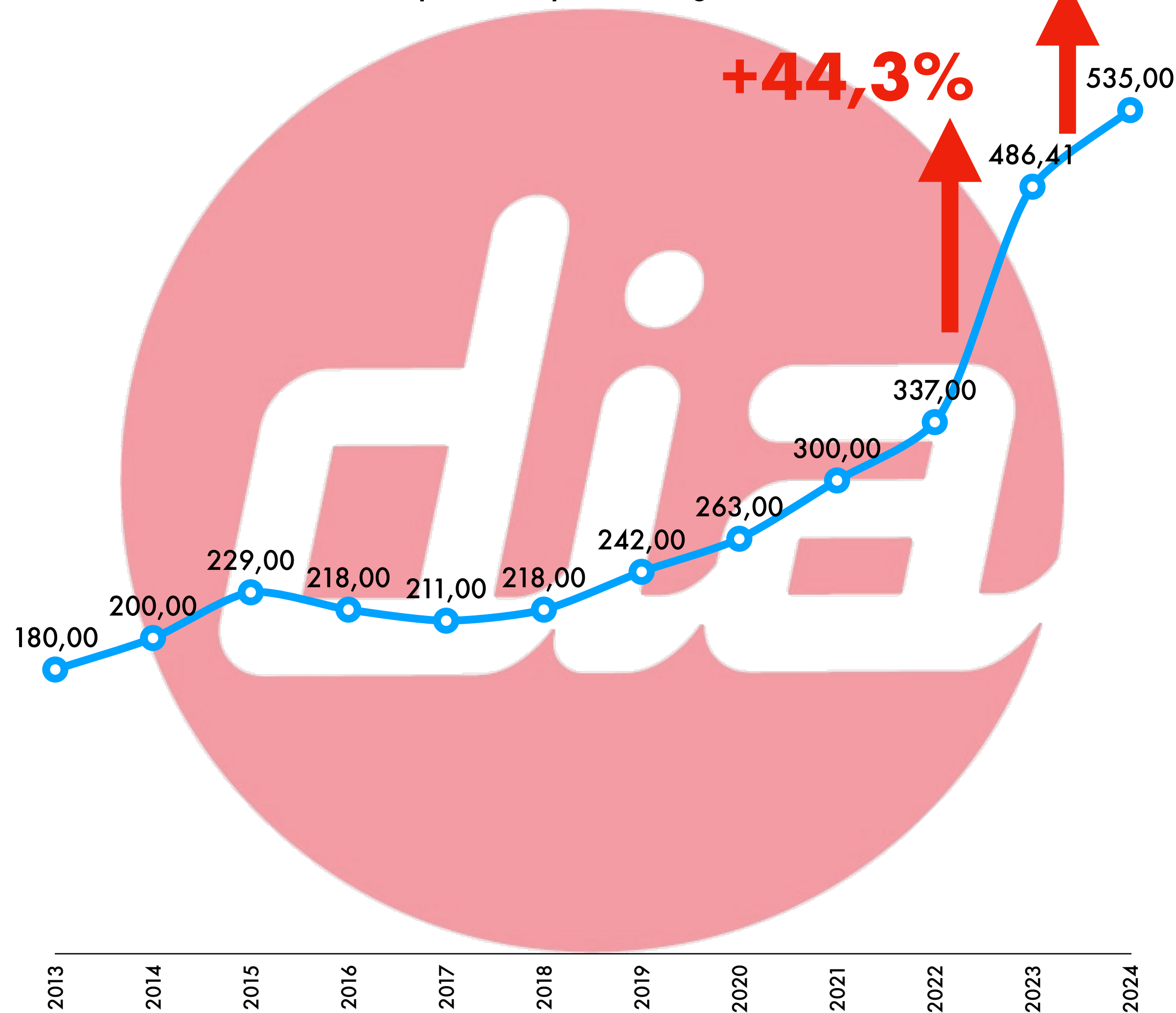
+53,1%



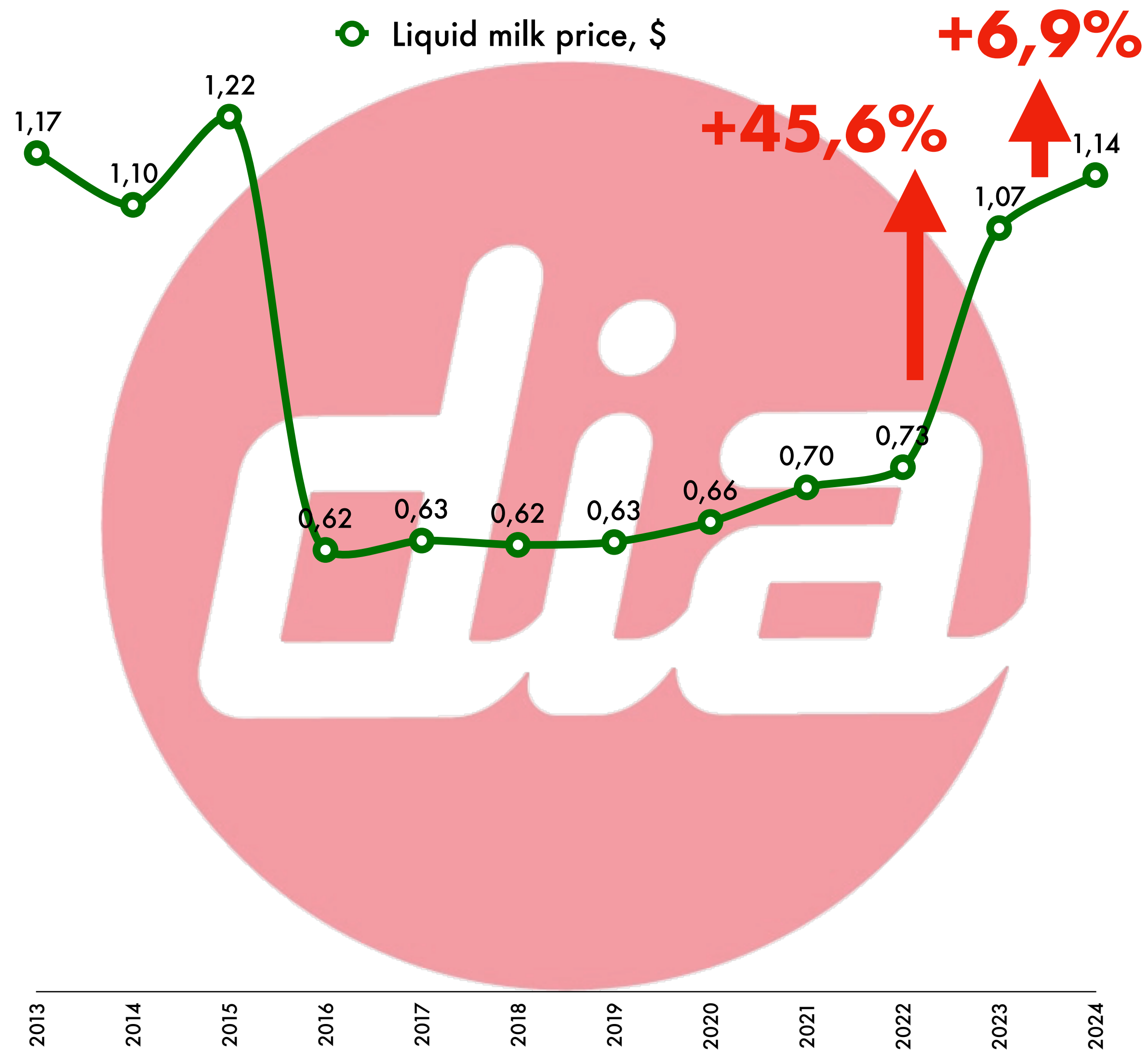
Цена питьевого молока

+1,8%

● Liquid milk price, tenge



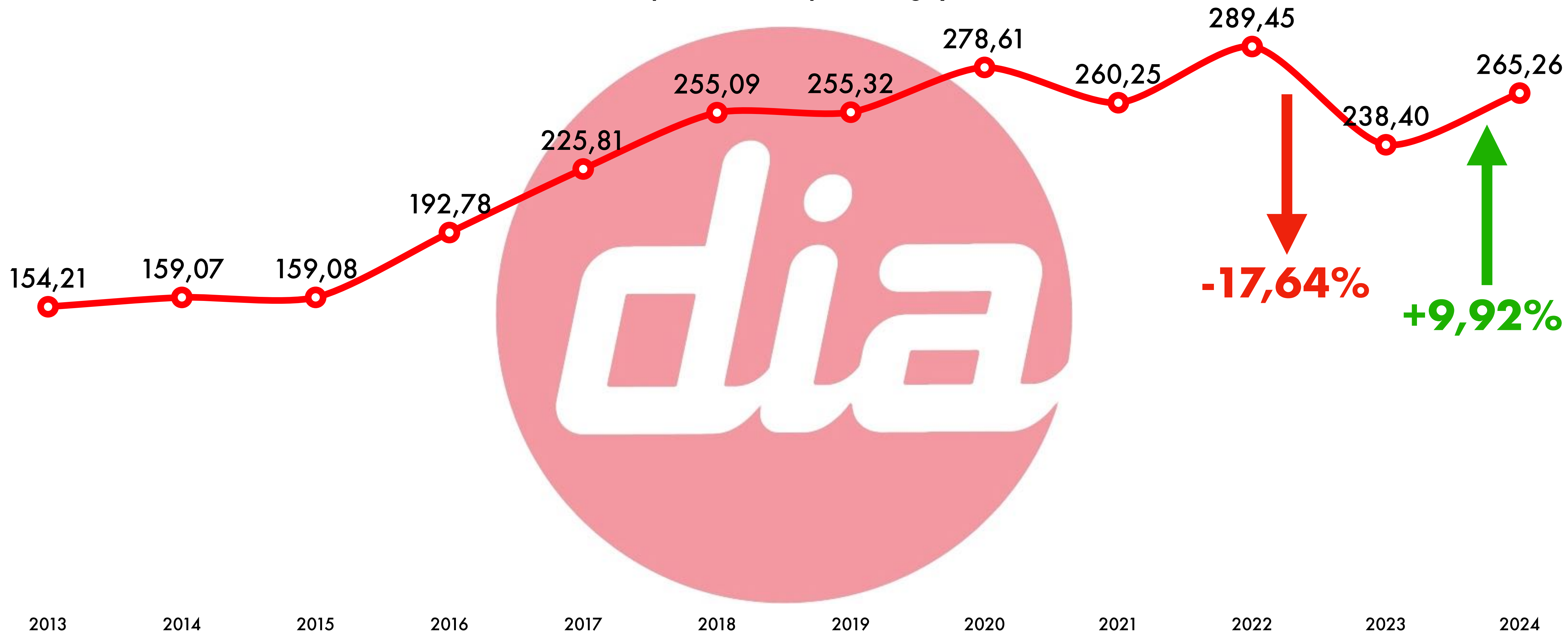
● Liquid milk price, \$



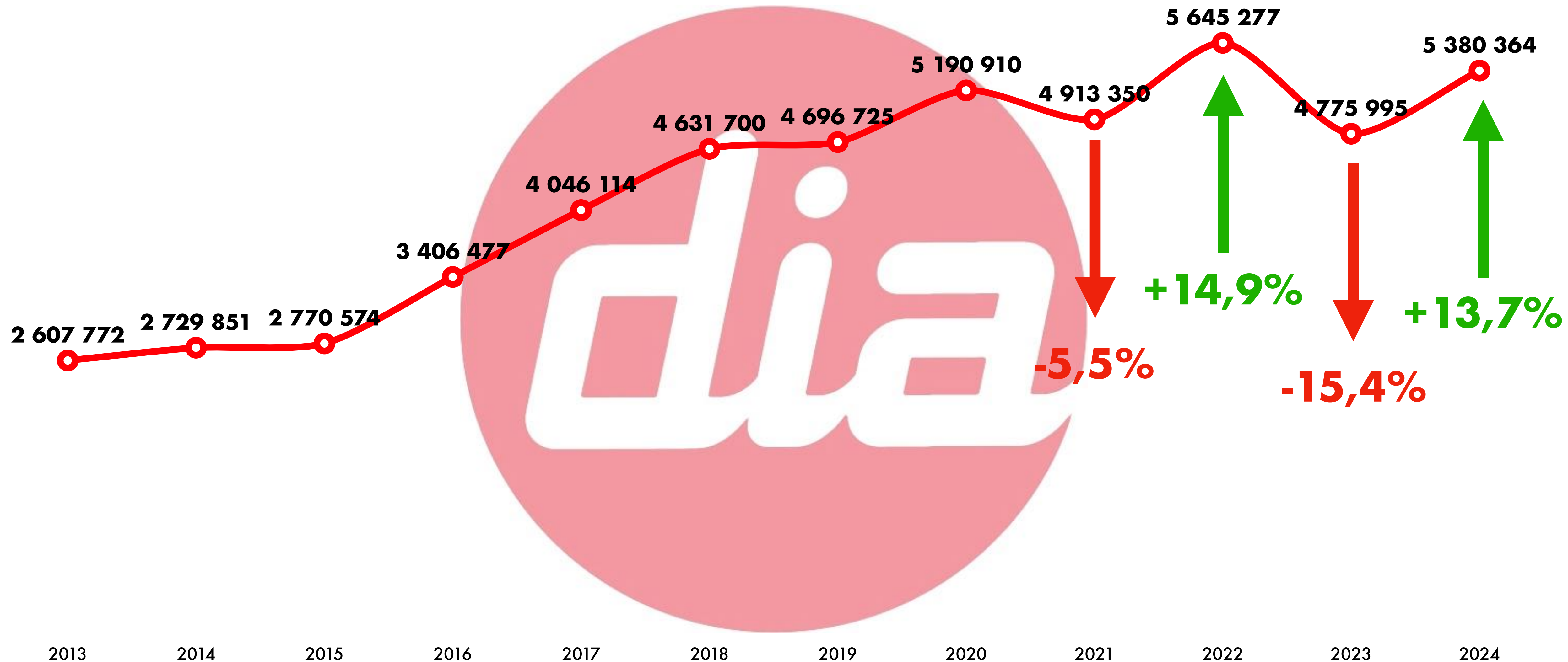
+6,9%

Потребление молока в Казахстане

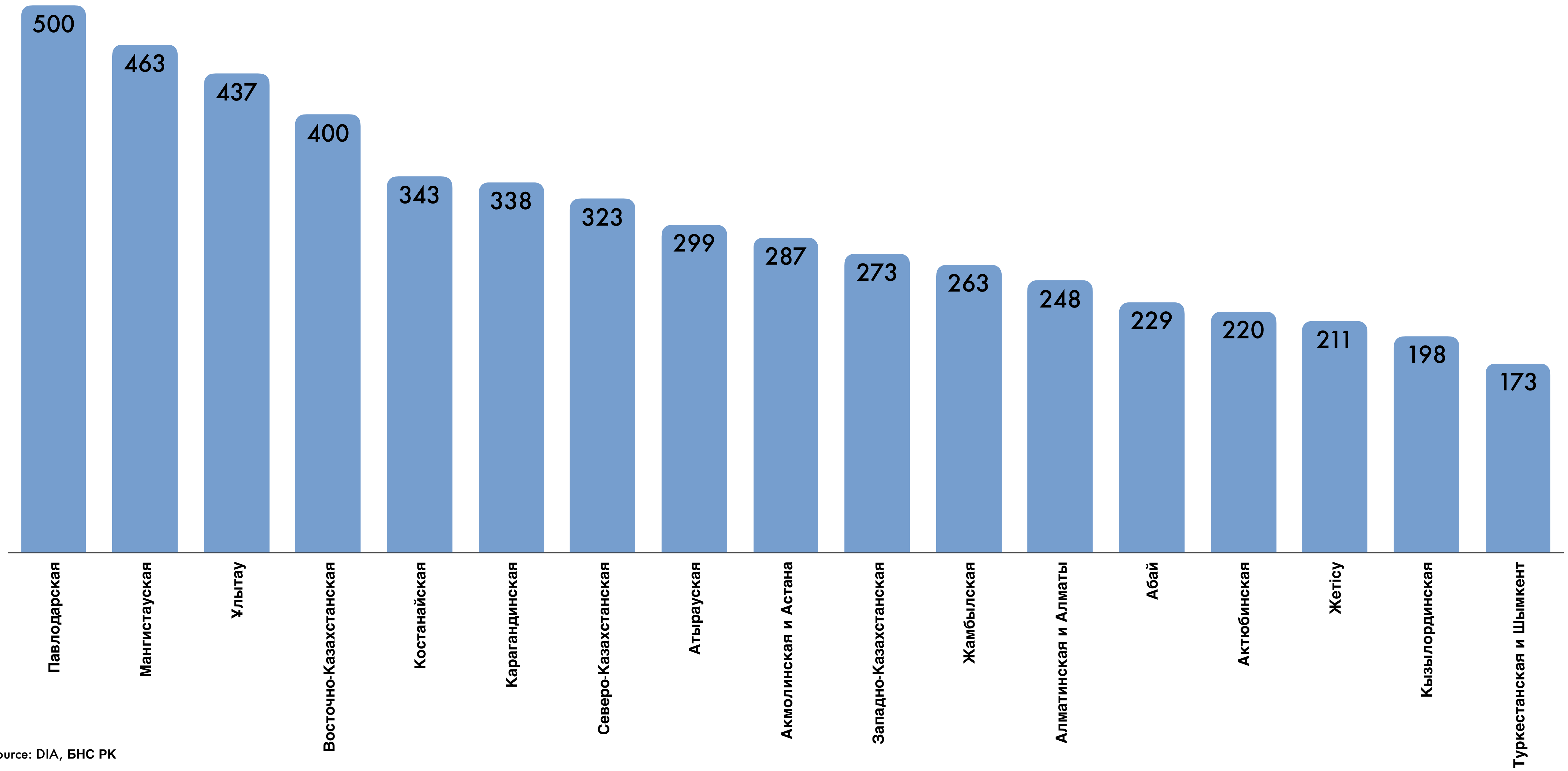
Per capita consumption, kg/year



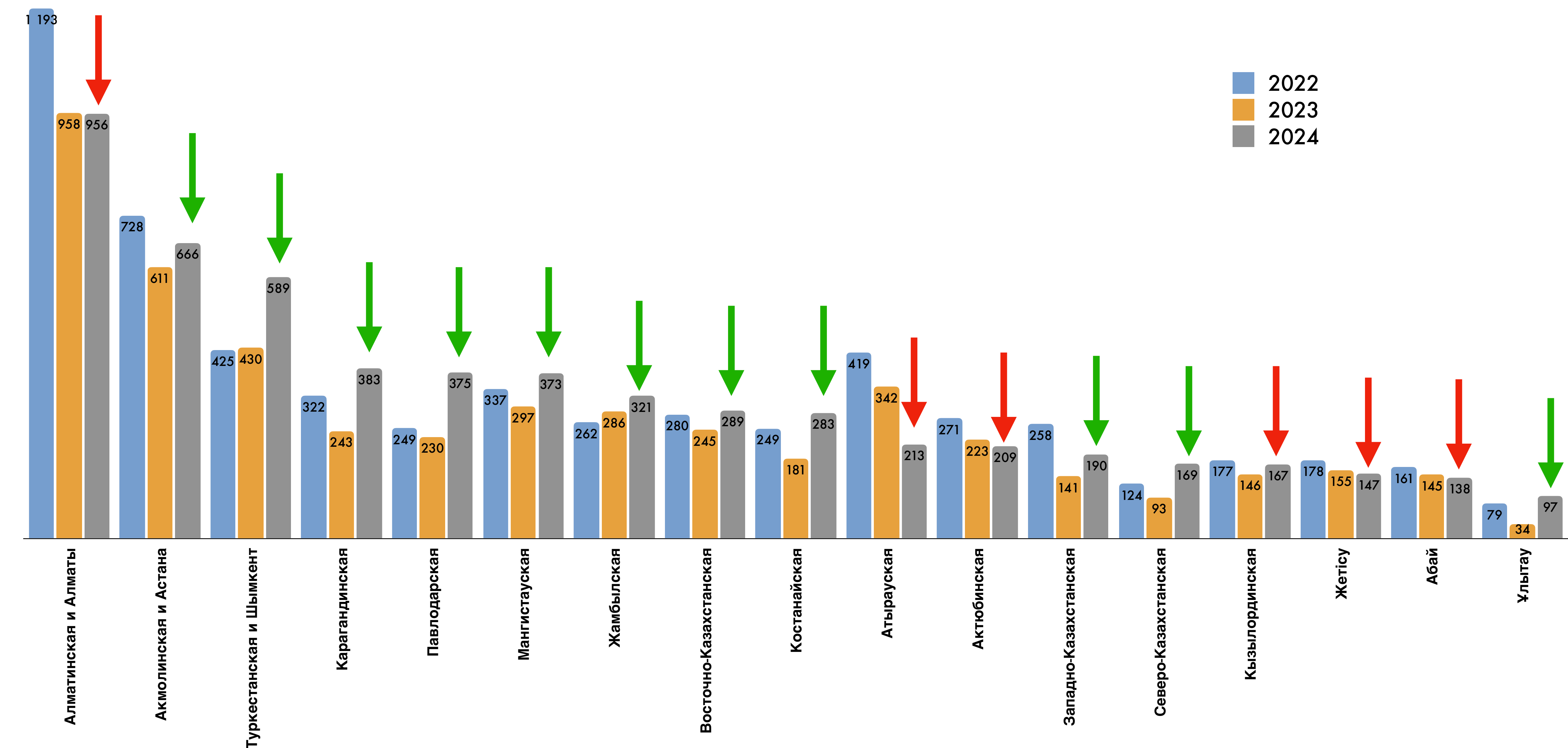
Объем рынка молока в Казахстане



Потребление на душу населения

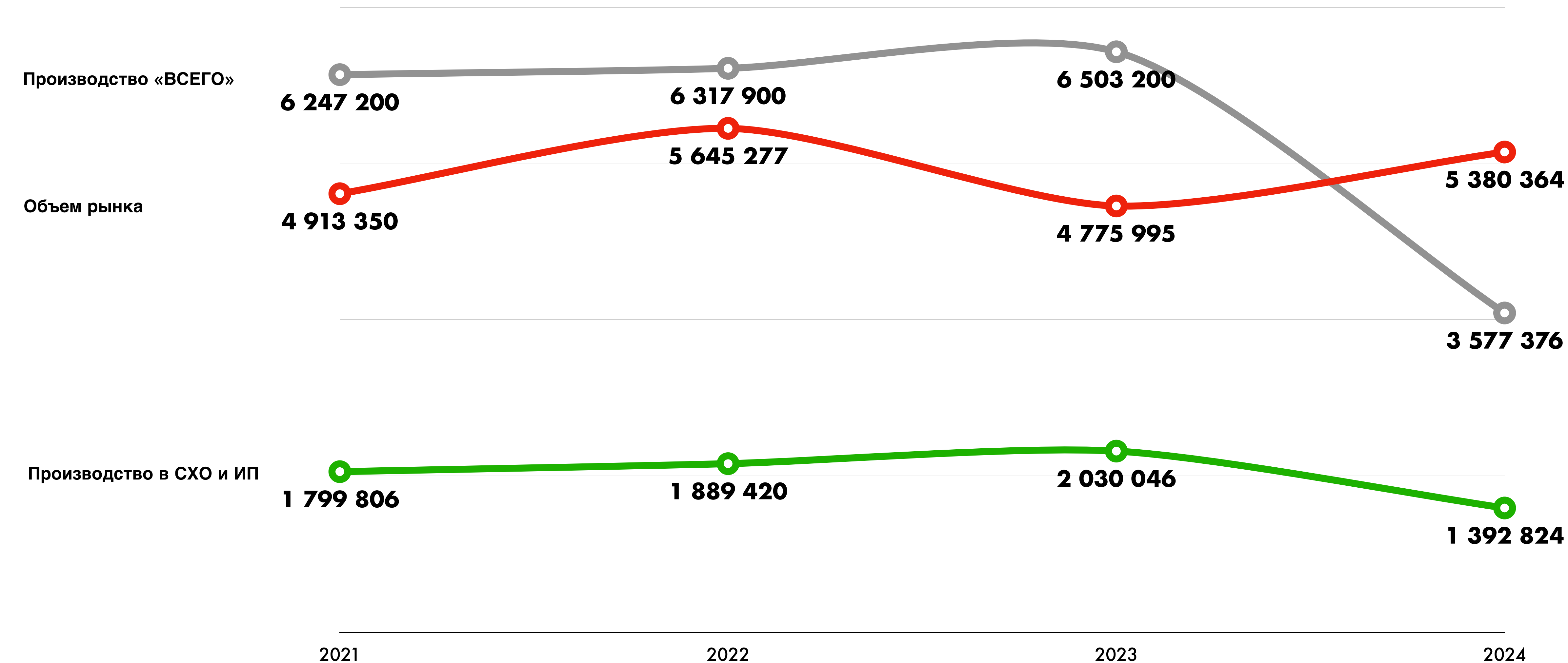


Потребность в молоке в разрезе регионов

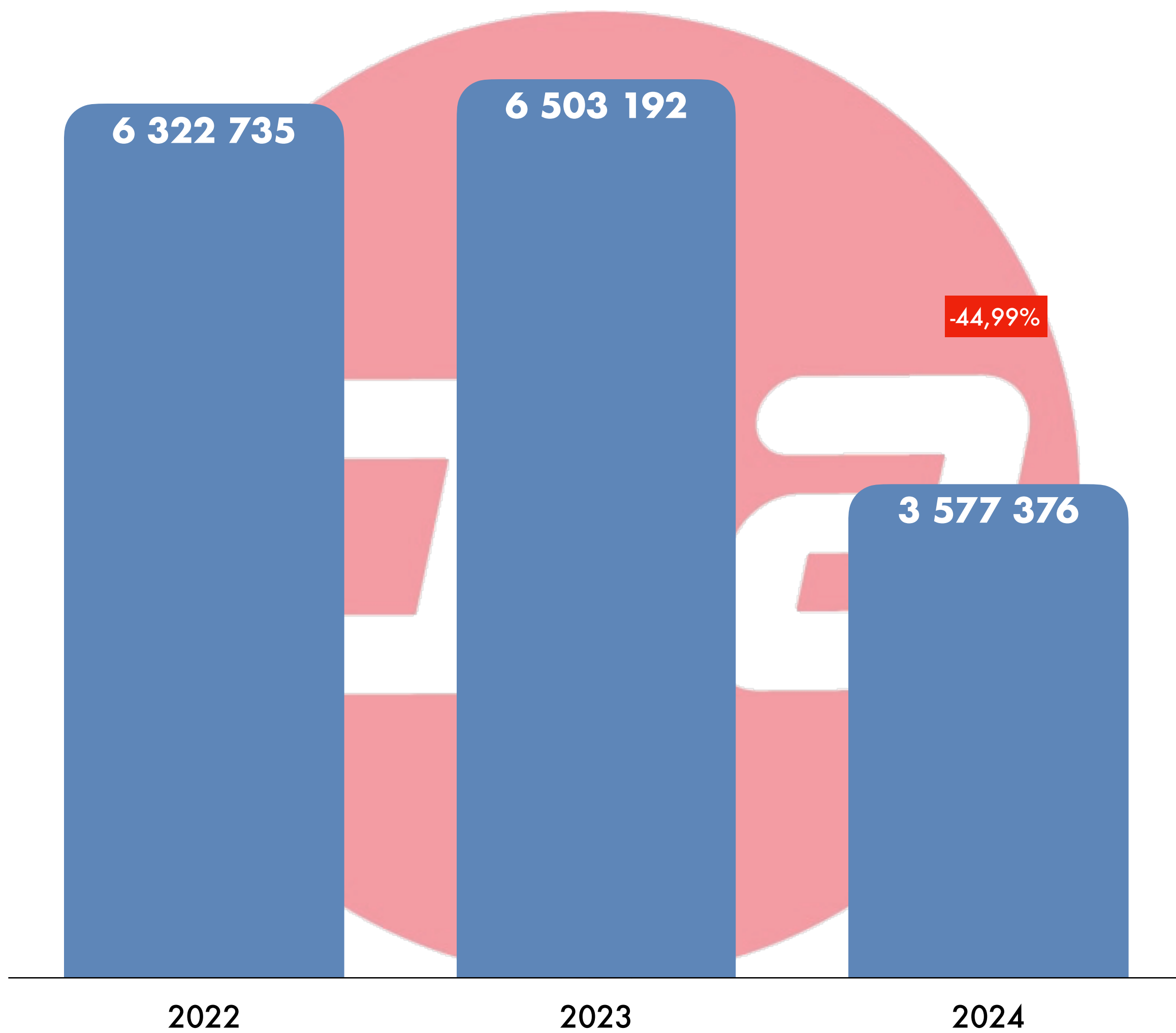


Статистические чудеса

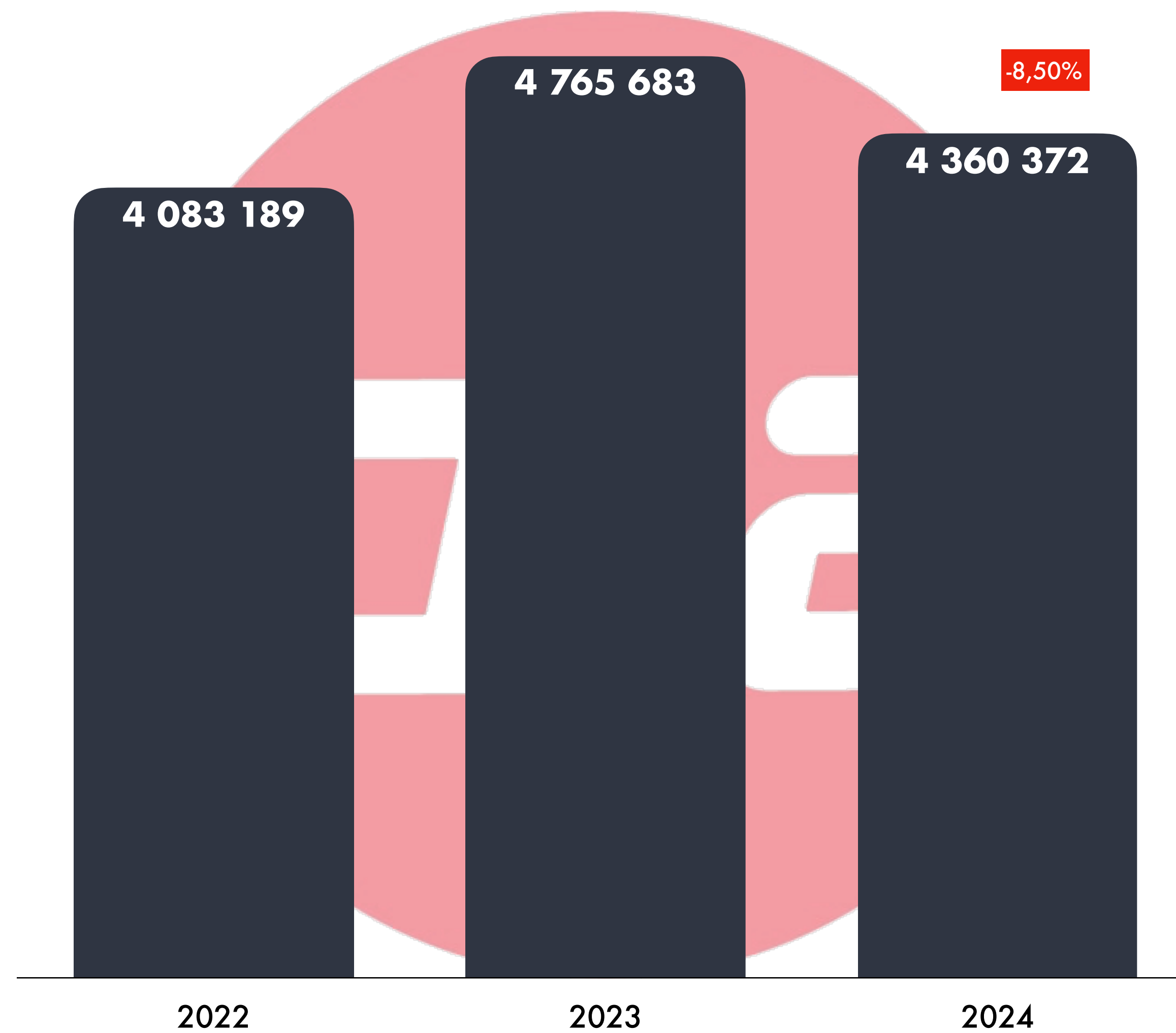
Объем рынка молока в Казахстане



Производство молока всего с ЛПХ



Поголовье коров с ЛПХ



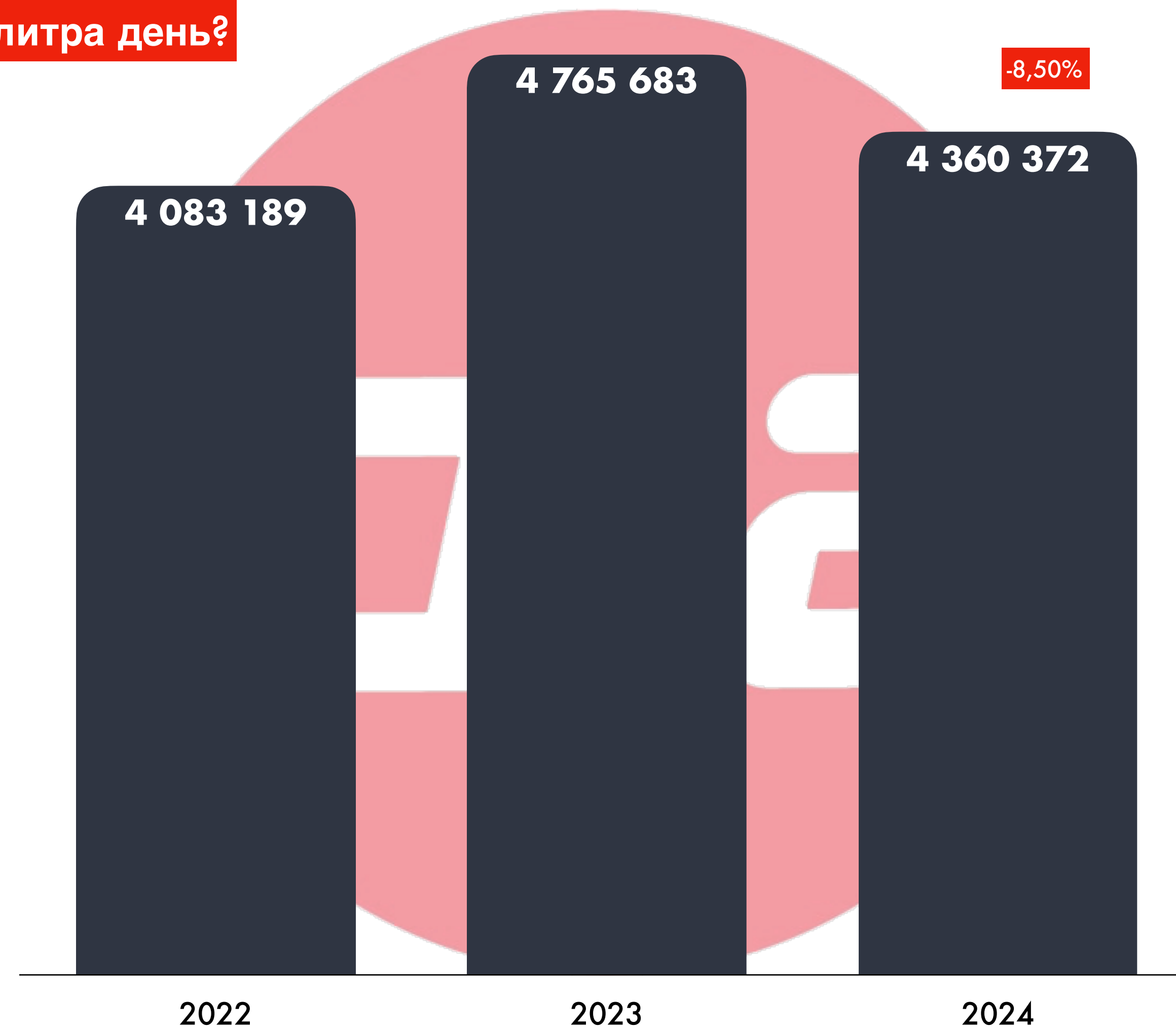
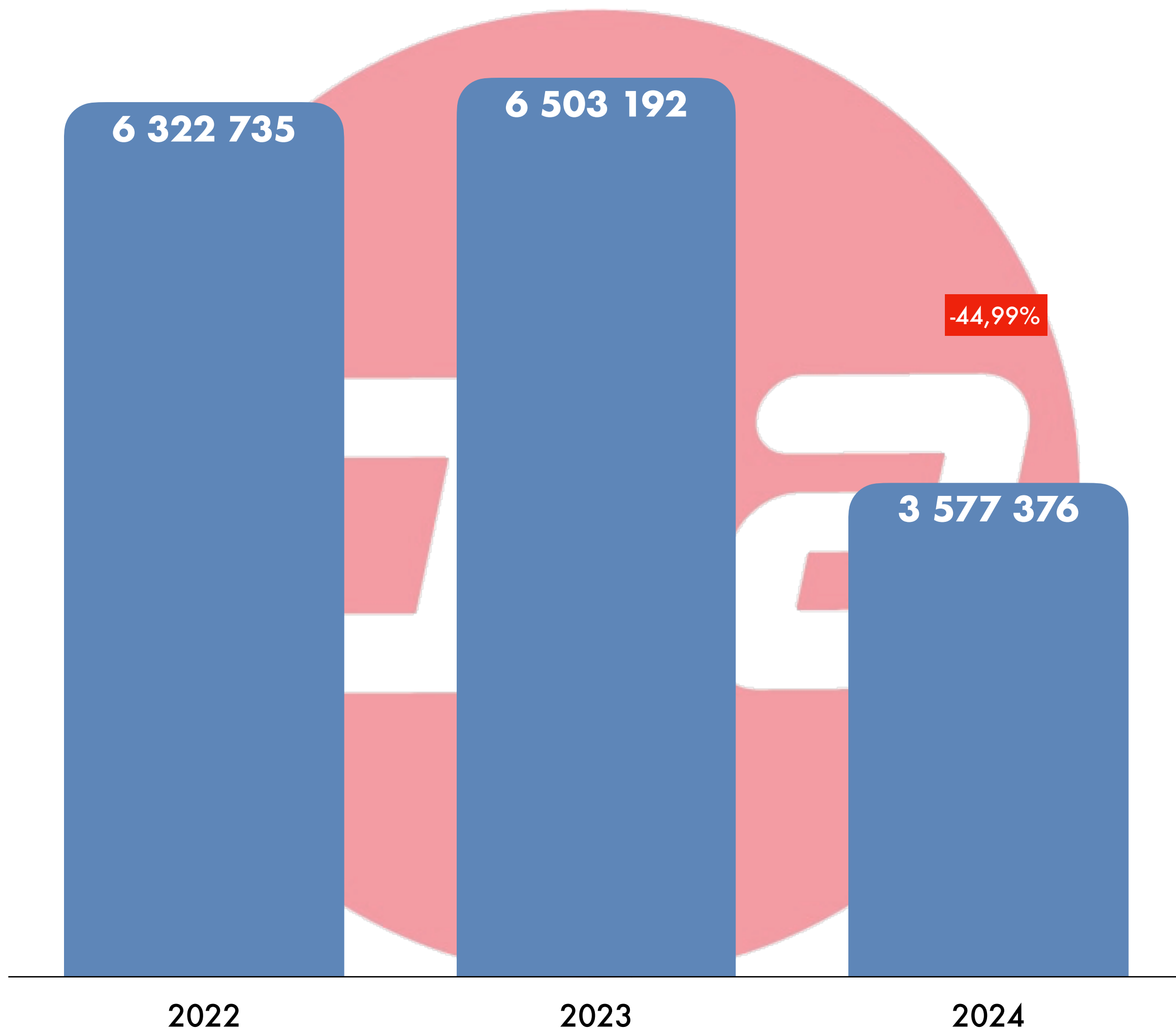
Производство молока всего с ЛПХ

Надой - 0,820 т. в год?

2 литра день?

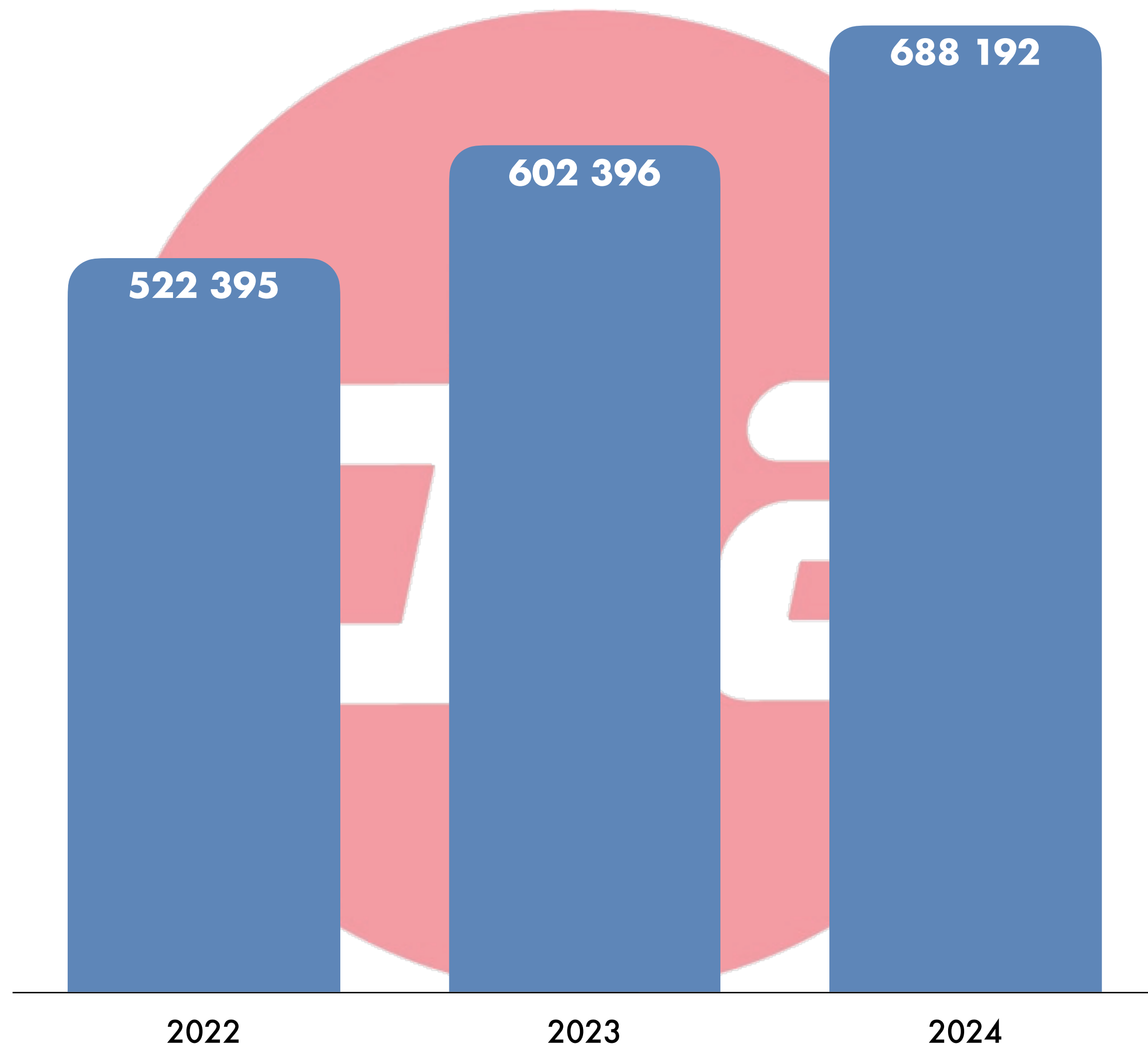
Поголовье коров с ЛПХ

-8,50%



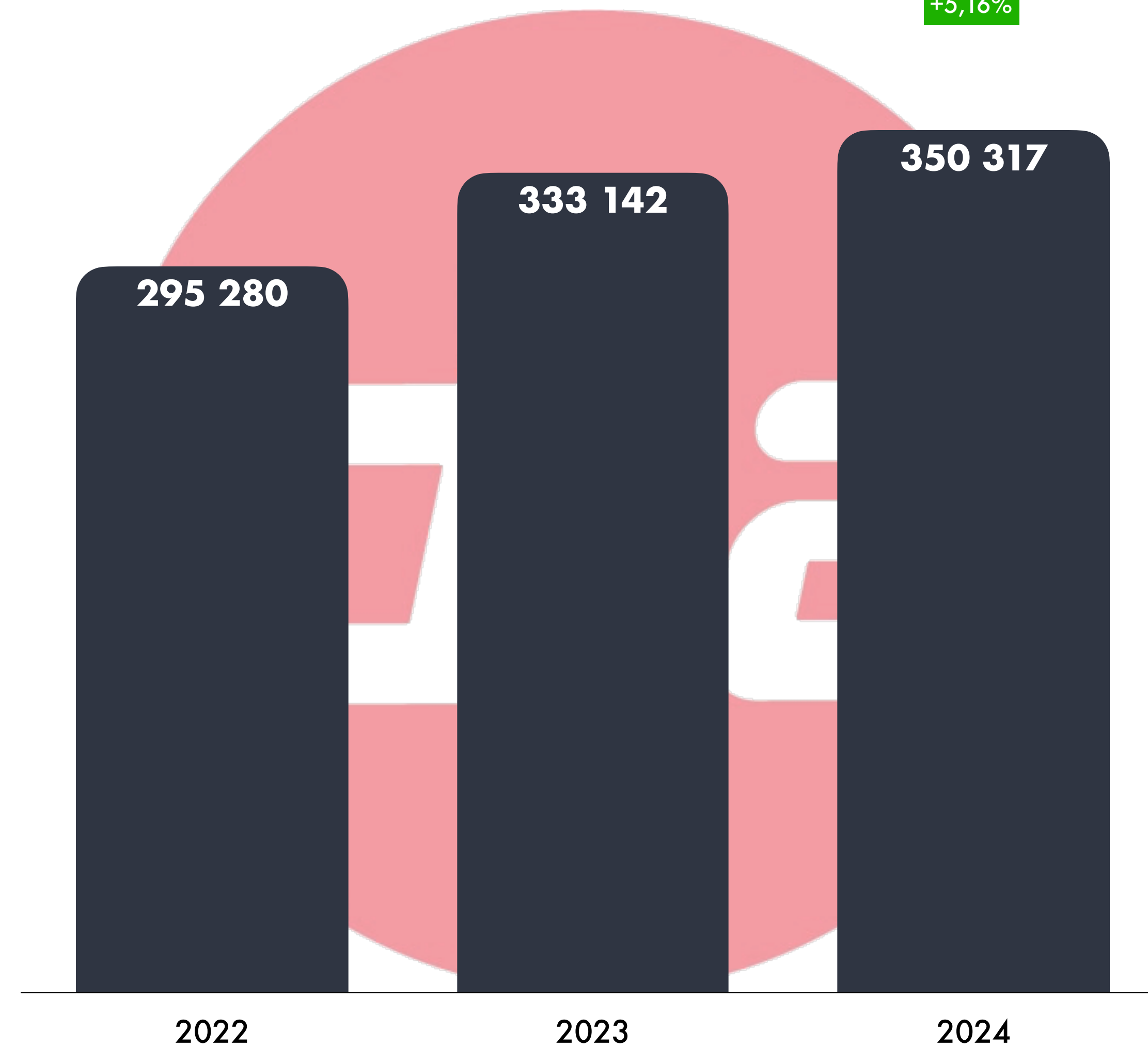
Производство молока в СХО

+14,24%

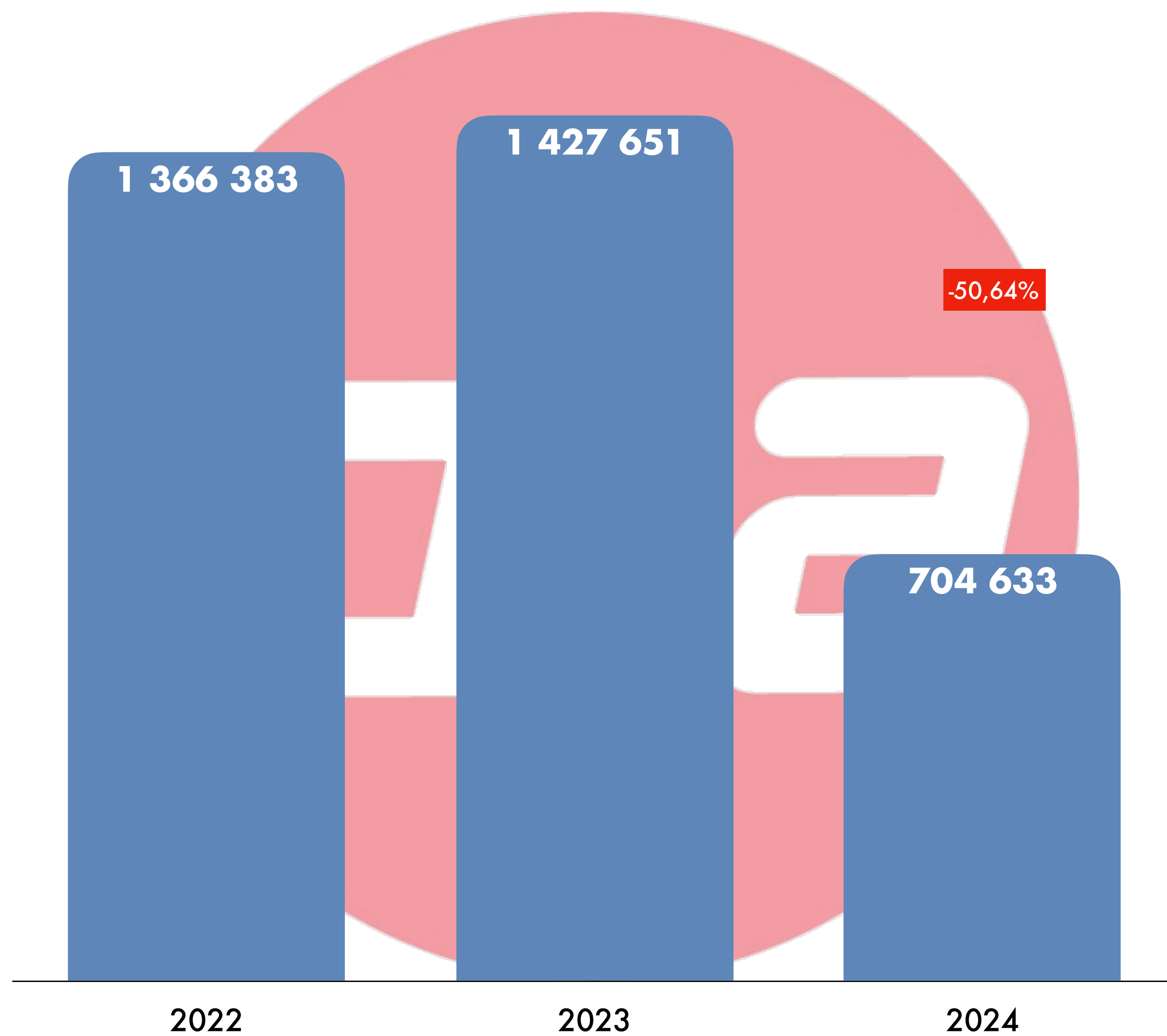


Поголовье коров в СХО

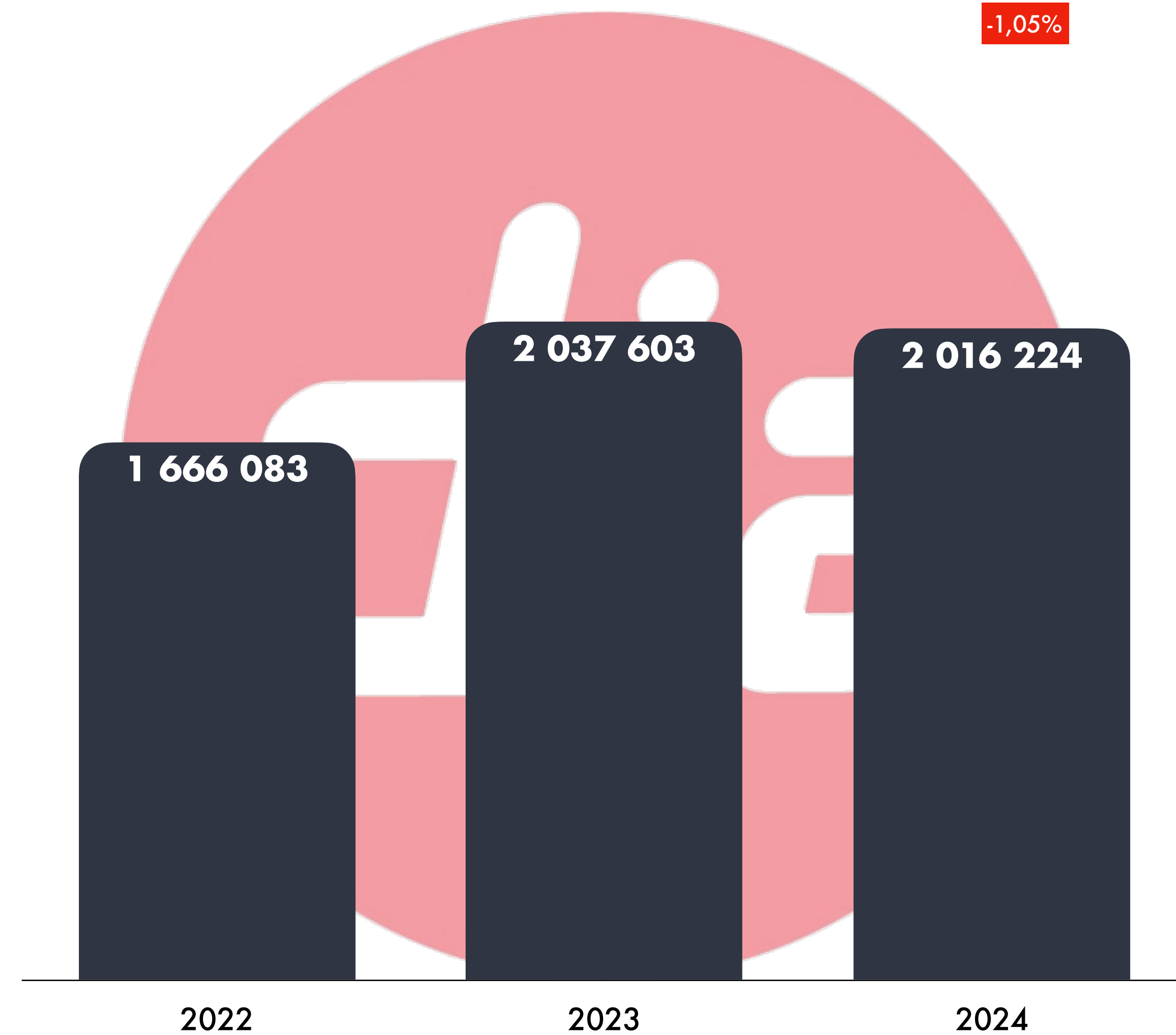
+5,16%



Производство молока в КФХ

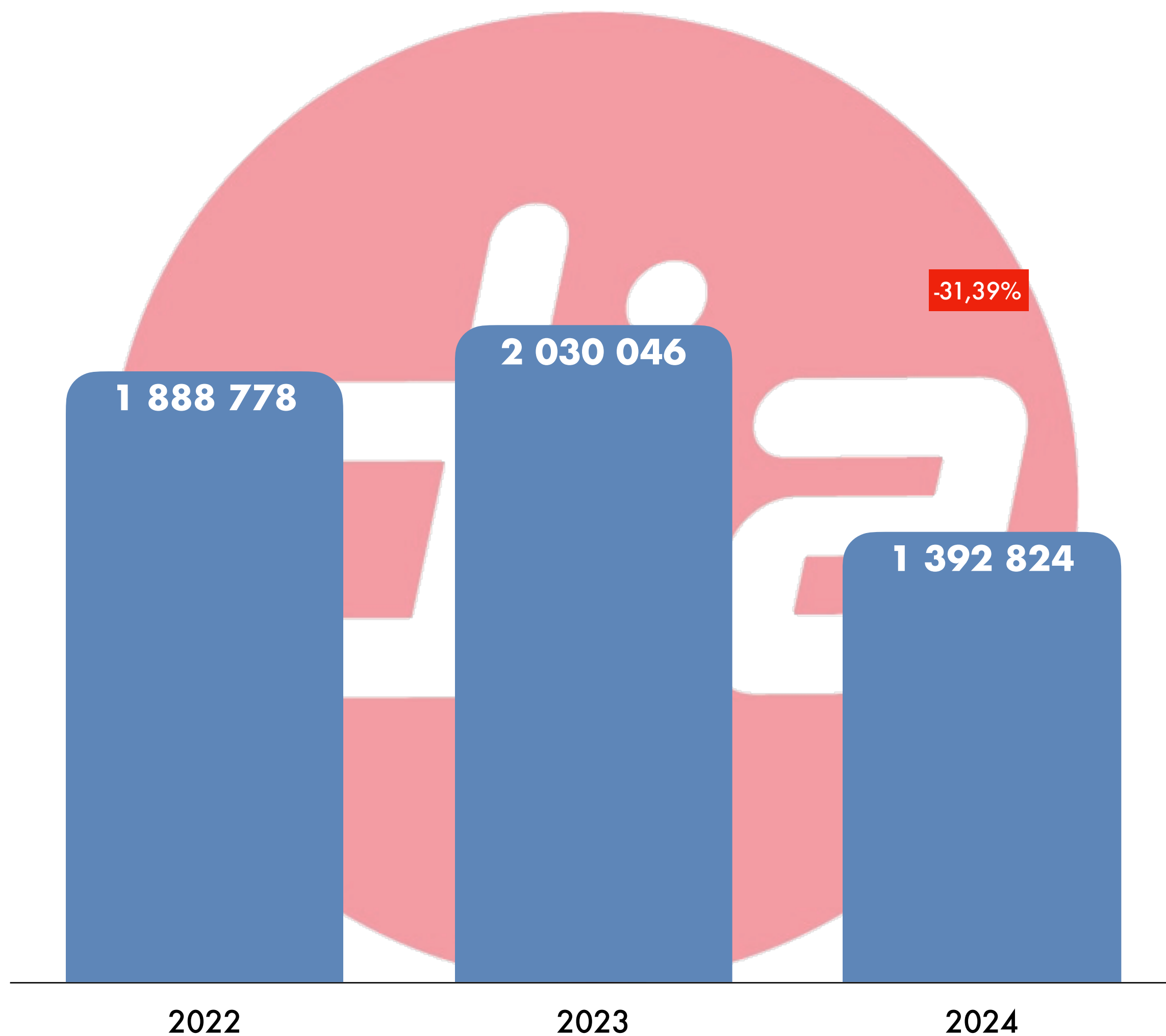


Поголовье коров КФХ

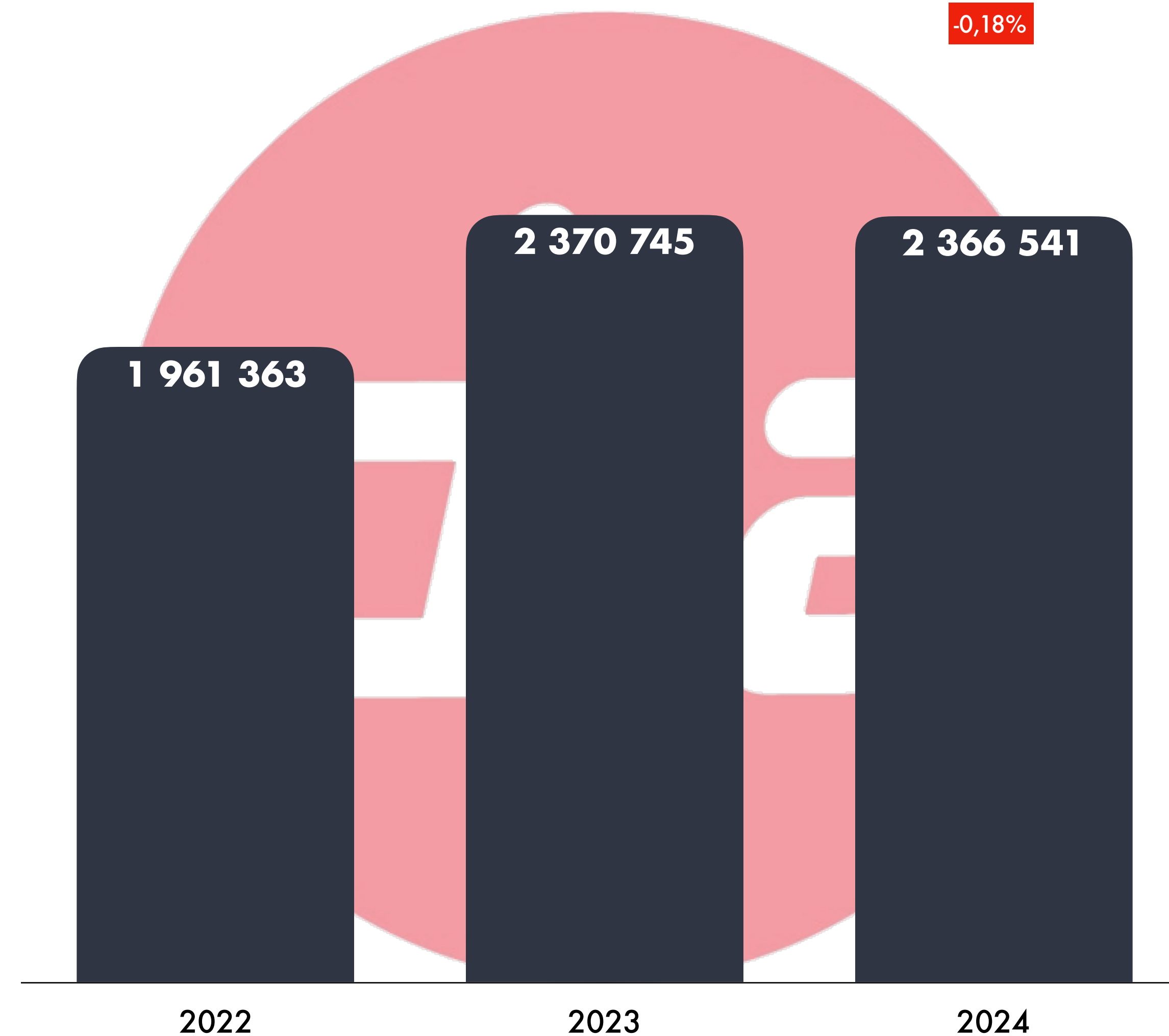


Производство молока и поголовье без учета ЛПХ

Производство молока без учета ЛПХ



Поголовье коров без учета ЛПХ



Производство молока в С

ез учета ЛПХ

-0,18%

745

2 366 541

1 888 778

2 030

2022

2023

2024

2023

2024

Казахстан лидирует по росту поголовья КРС в СНГ: 8,9 млн голов на 1 апреля

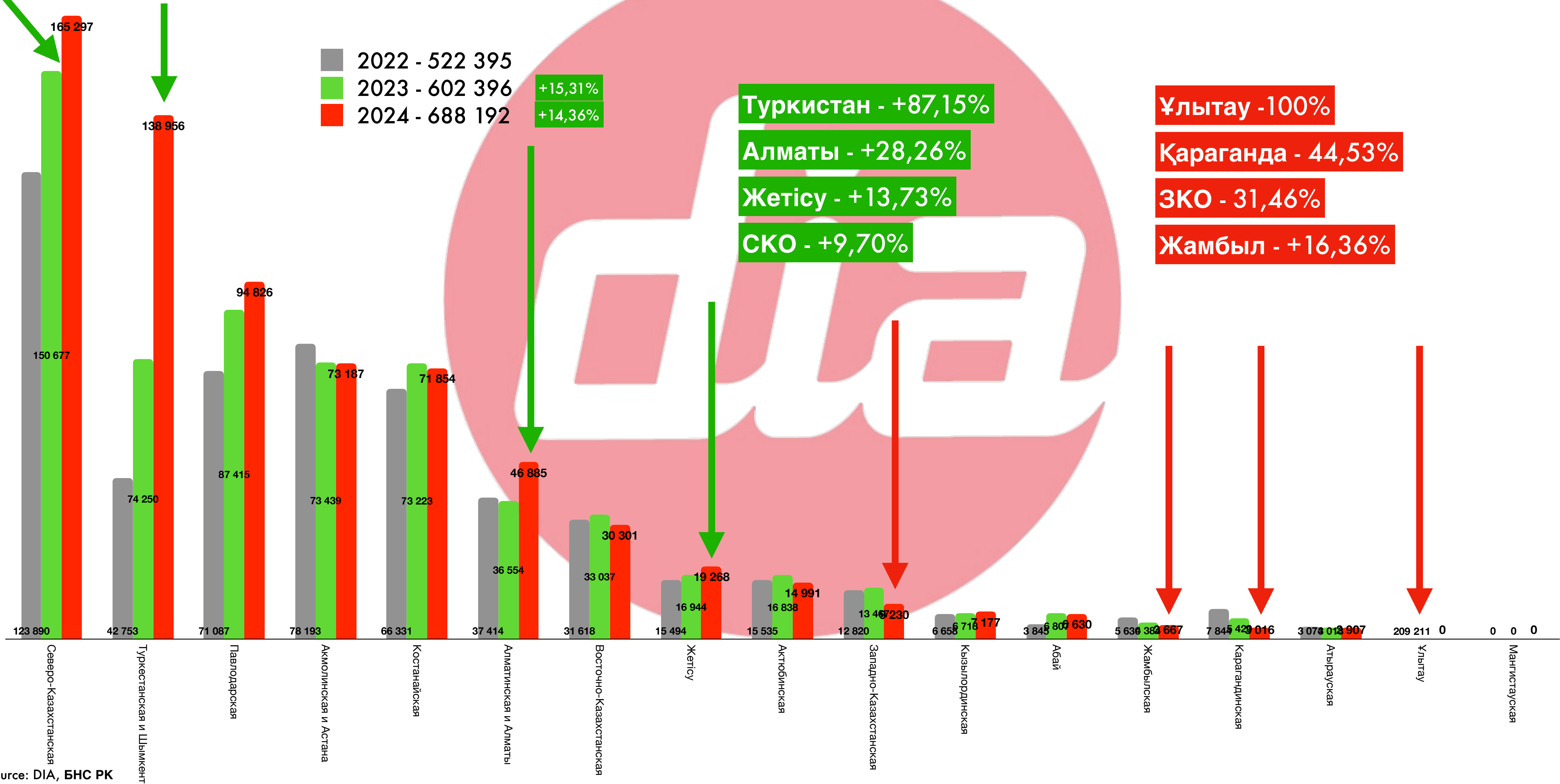
Источник: tazabek.kg 36 RU EN KZ

По данным на 1 апреля 2025 года совокупное поголовье КРС в странах СНГ достигло 51,66 млн голов, увеличившись на 2,4% по сравнению с аналогичным периодом 2024 года. Несмотря на общий положительный тренд, по сравнению с апрелем 2023 года зафиксировано незначительное снижение — на 0,1%. Лидером по темпам прироста стала Республика Казахстан.



Производство молока

Производство молока в СХО в разрезе регионов, тыс тонн



Производство молока в КФХ в разрезе регионов, тыс тонн

Производство молока в КФХ 2022 1 366 383
Производство молока в КФХ 2023 1 427 651
Производство молока в КФХ 2024 704 633

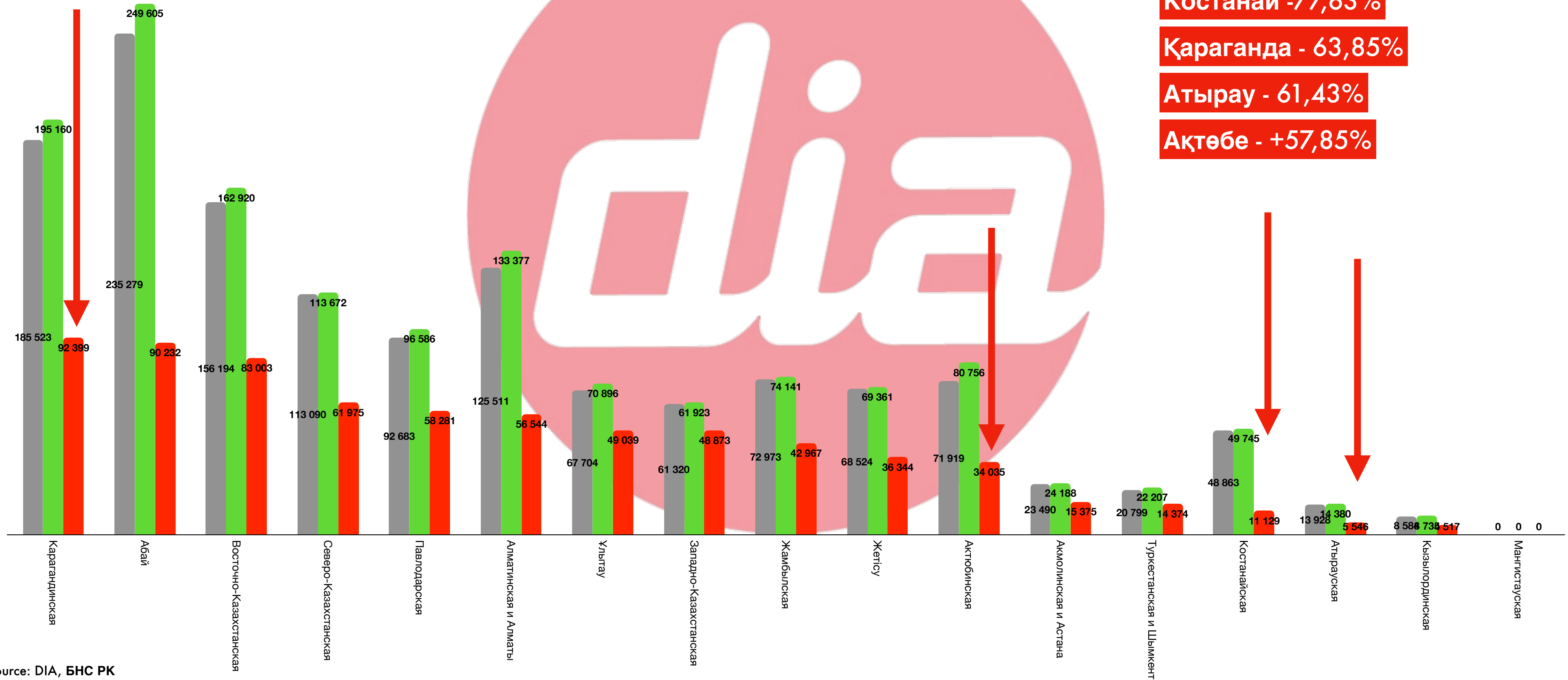
+4,48%
-50,64%

Костанай -77,63%

Қараганда - 63,85%

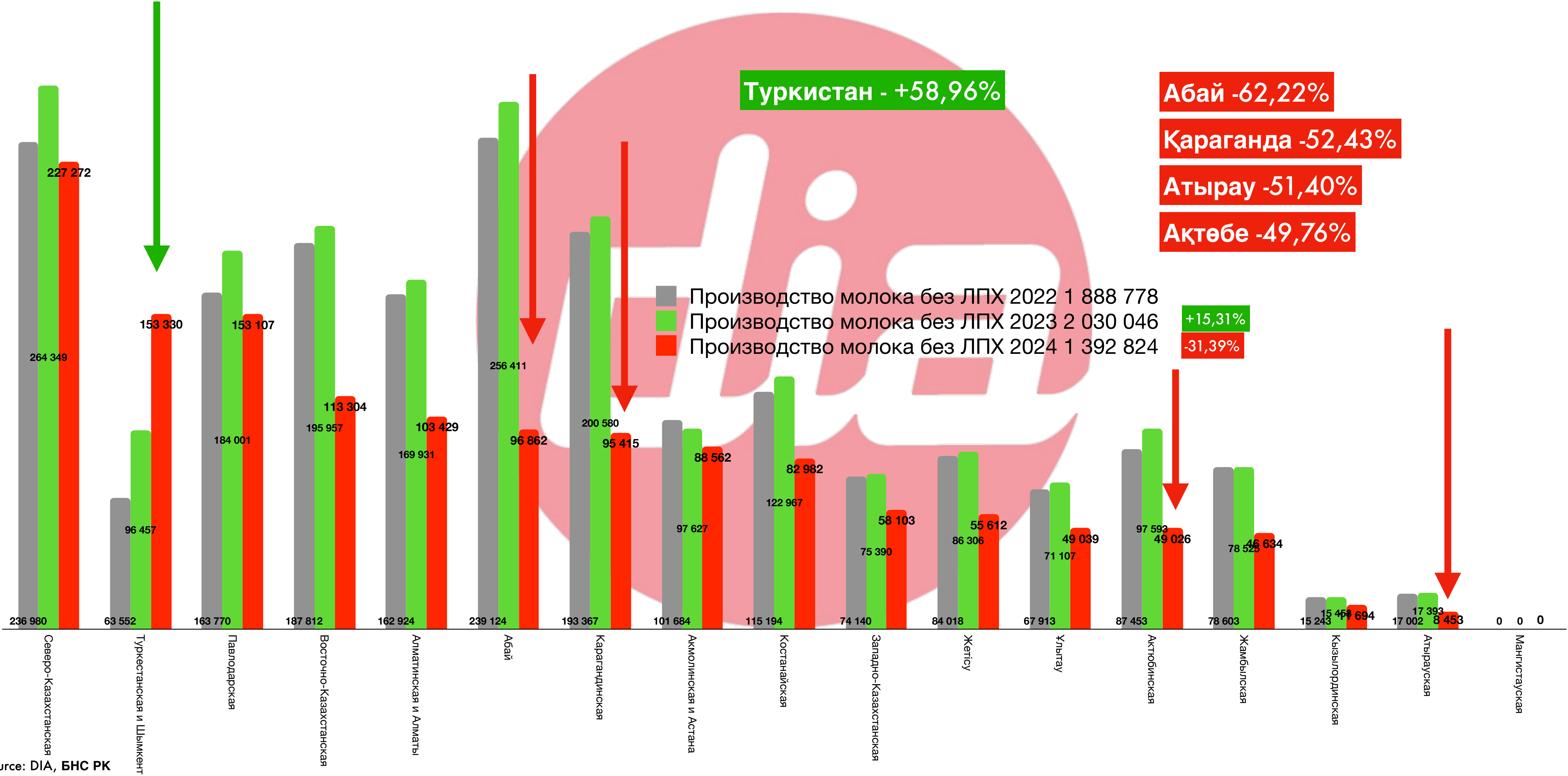
Атырау - 61,43%

Ақтөбе - +57,85%



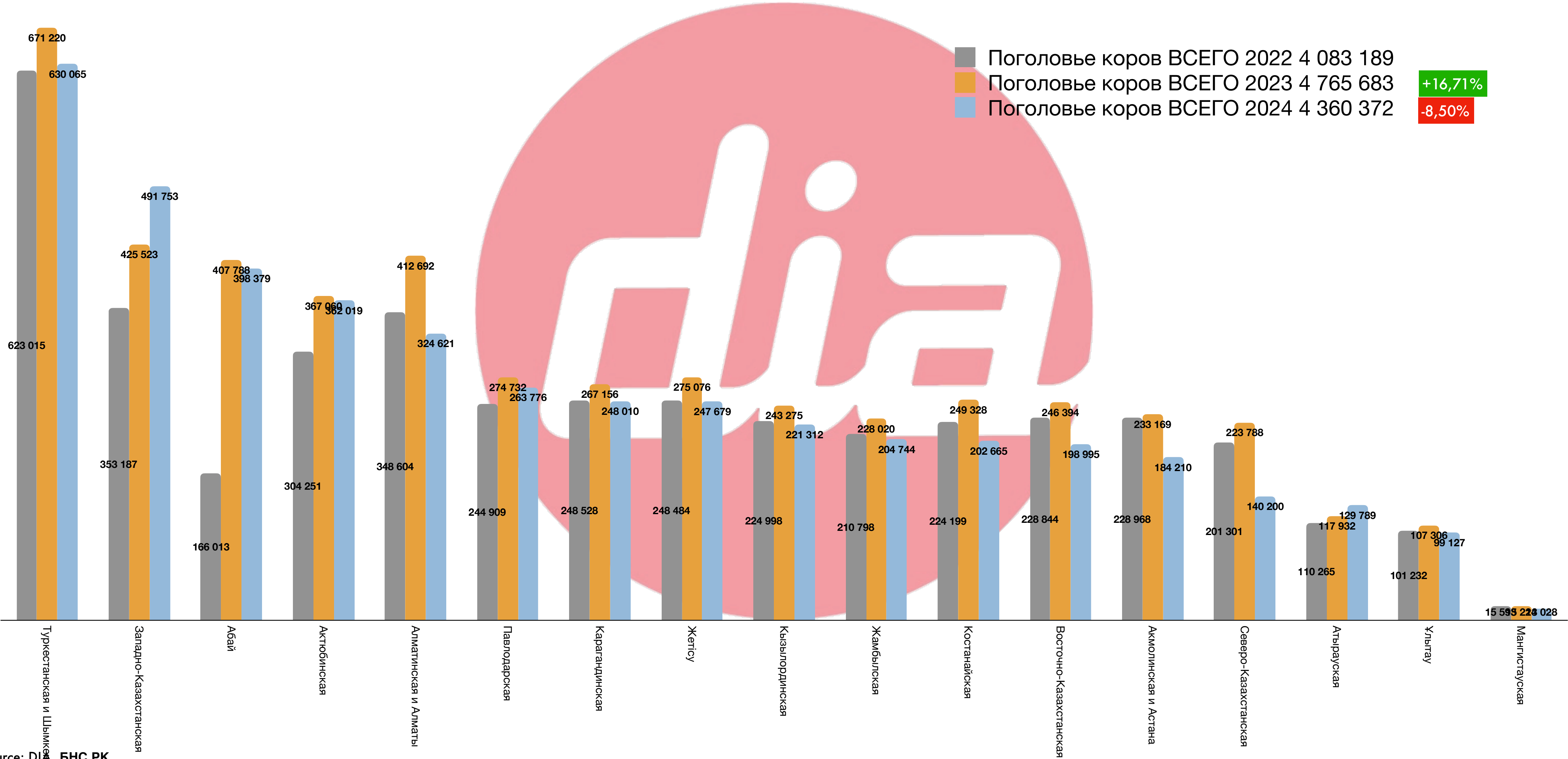
Производство молока без учета ЛПХ в разрезе регионов, тыс тонн

Производство молока без ЛПХ

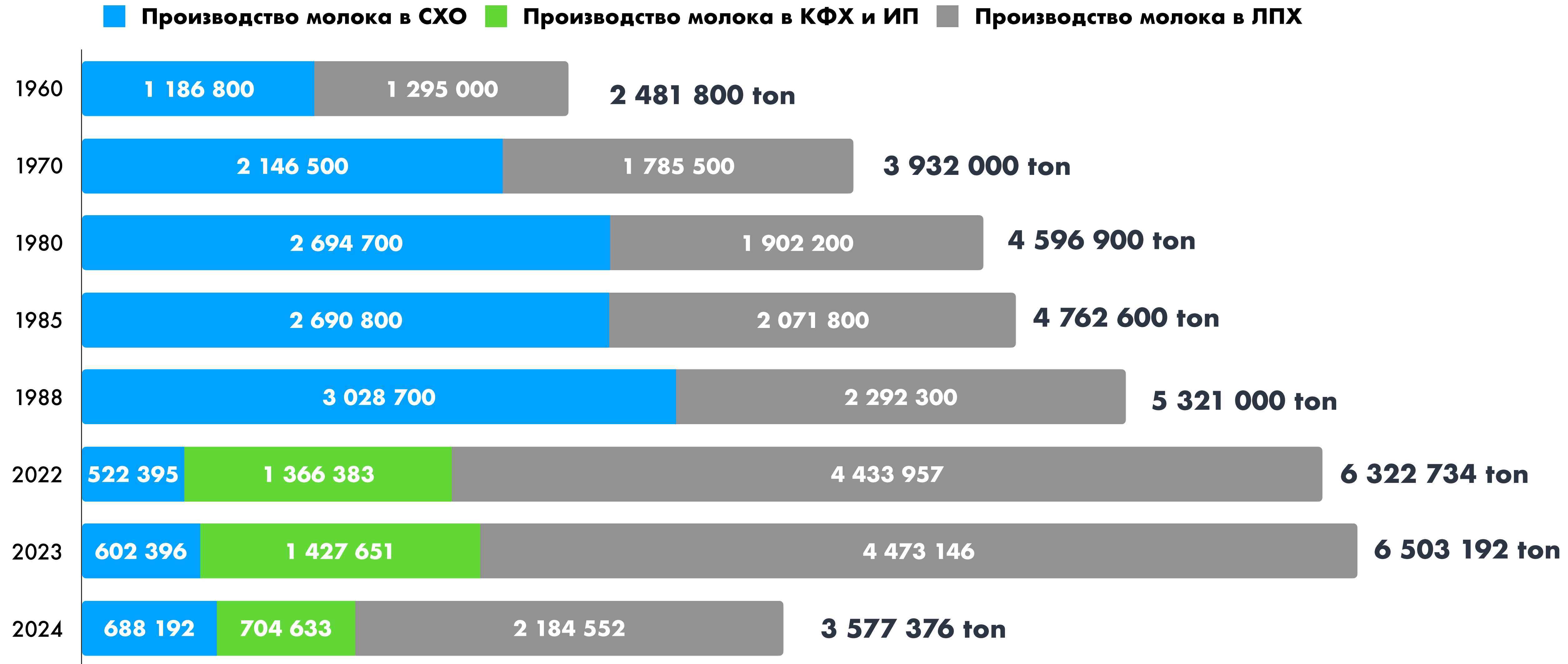


Поголовье коров в разрезе регионов ВСЕГО С ЛПХ, тыс тонн

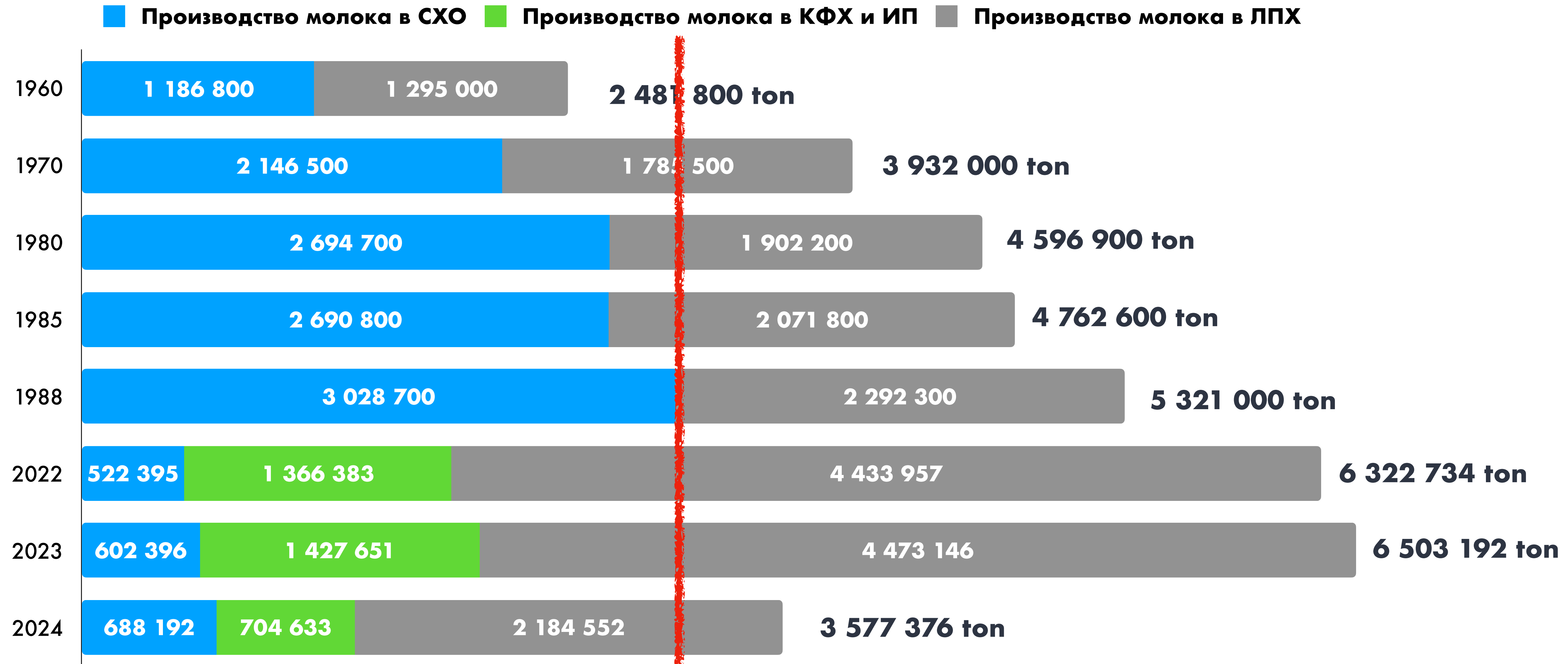
Производство молока ВСЕГО



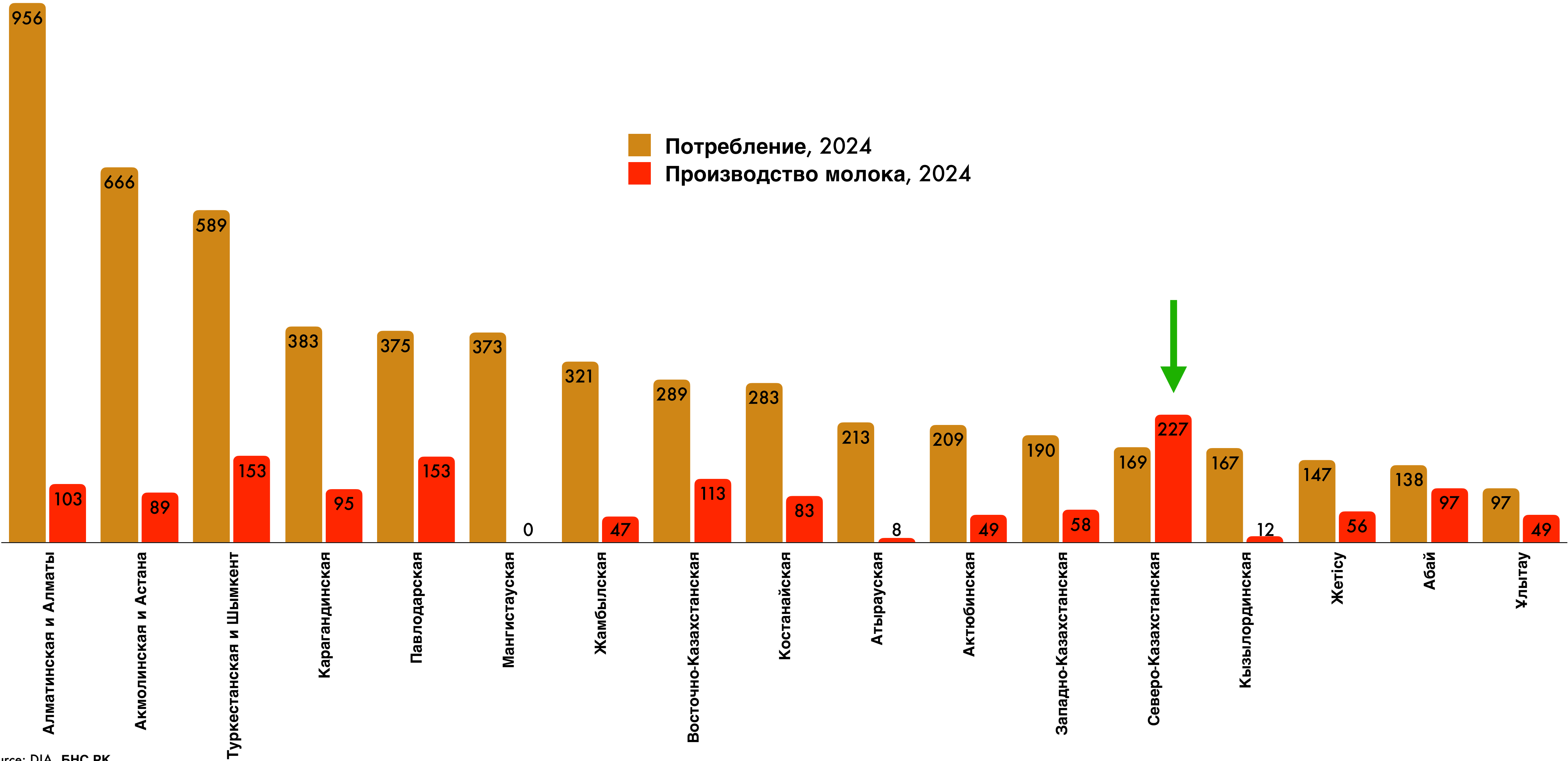
Структура производства молока в Казахстане



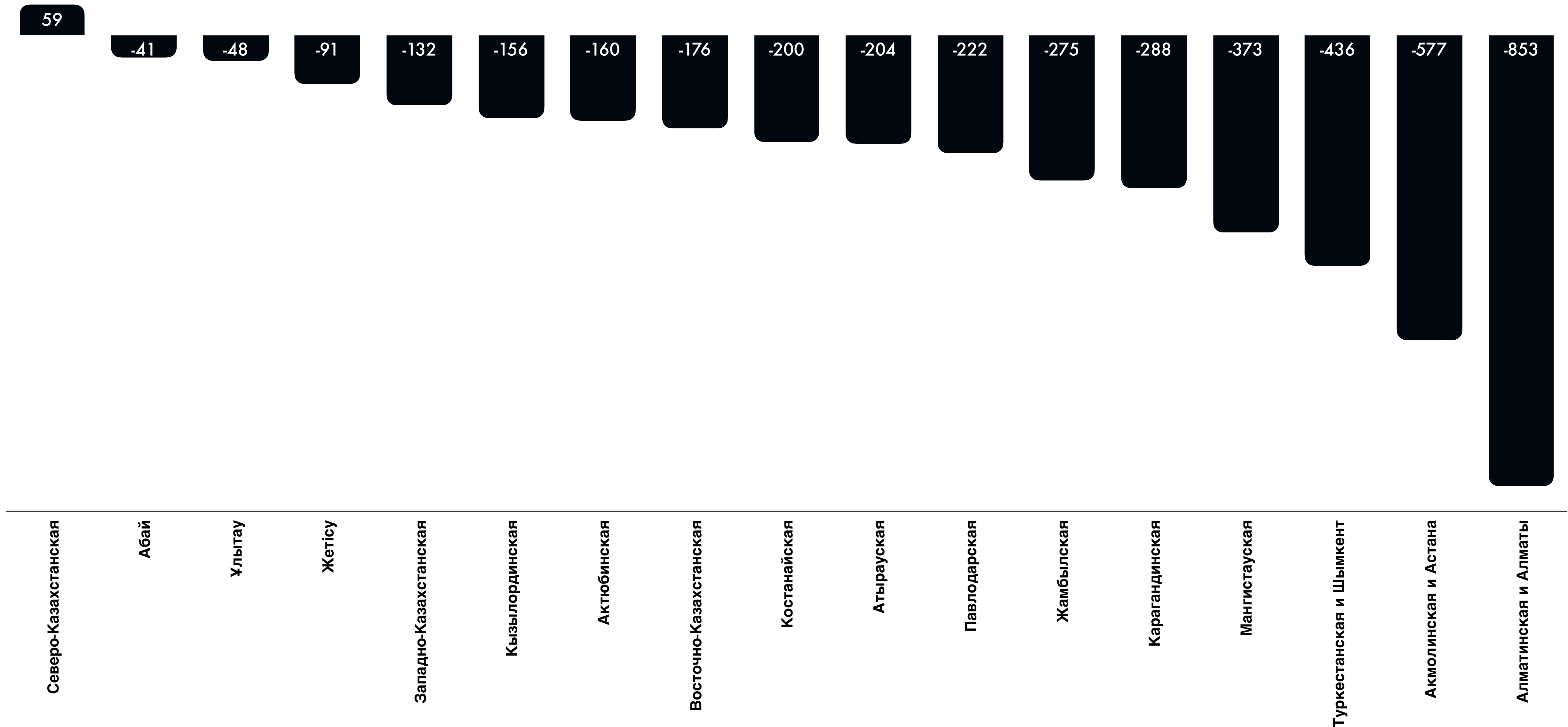
Структура производства молока в Казахстане



Потребление vs производство 2024

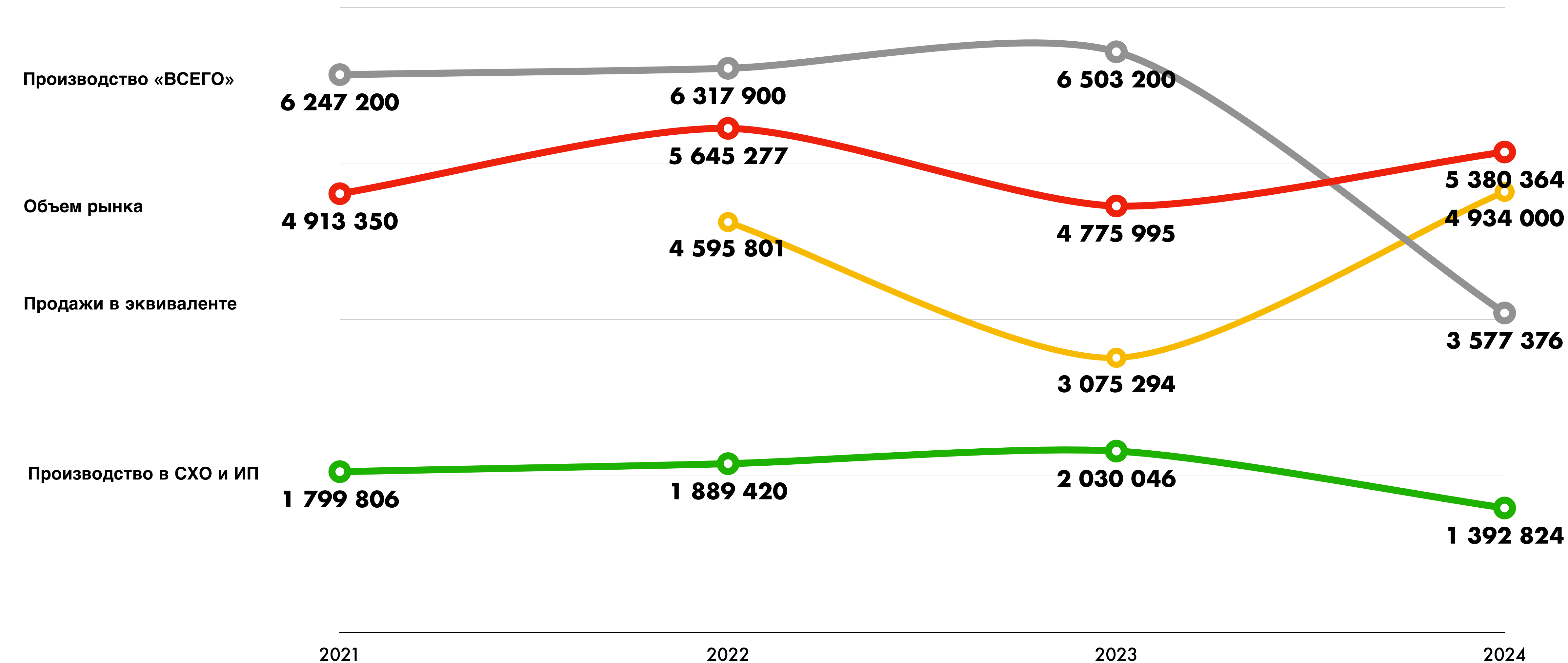


Профицитные и дефицитные регионы

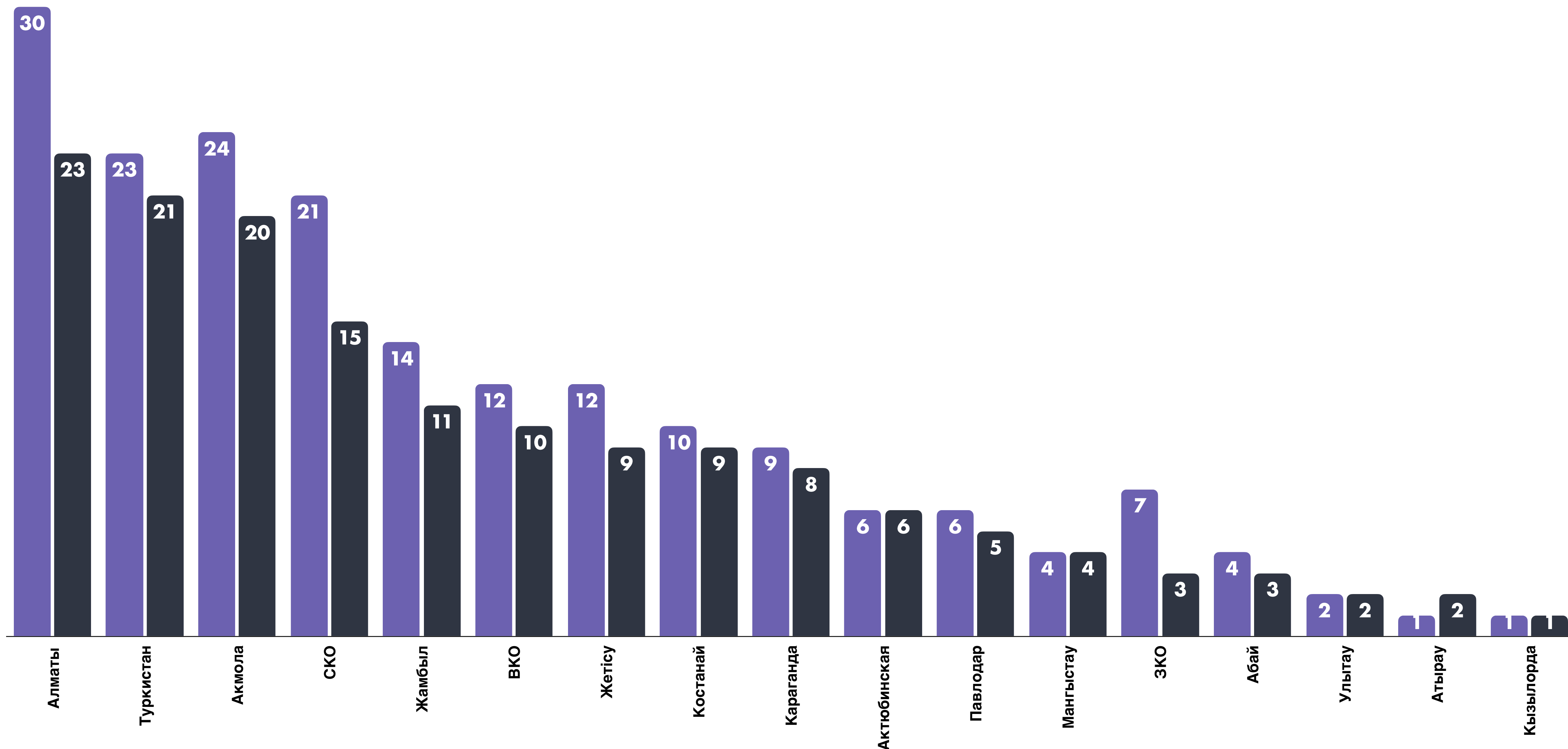


Переработка

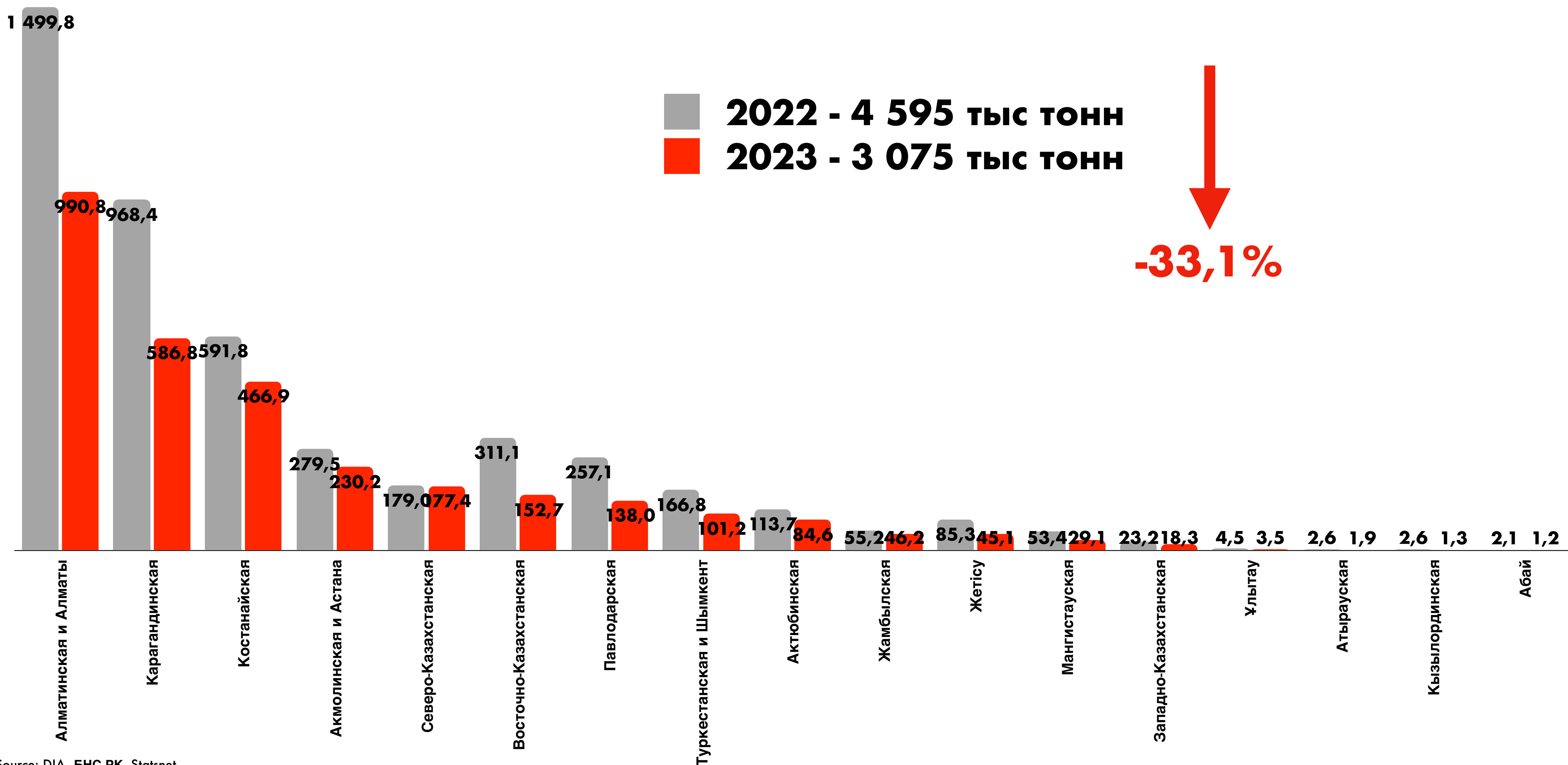
Объем рынка молока в Казахстане



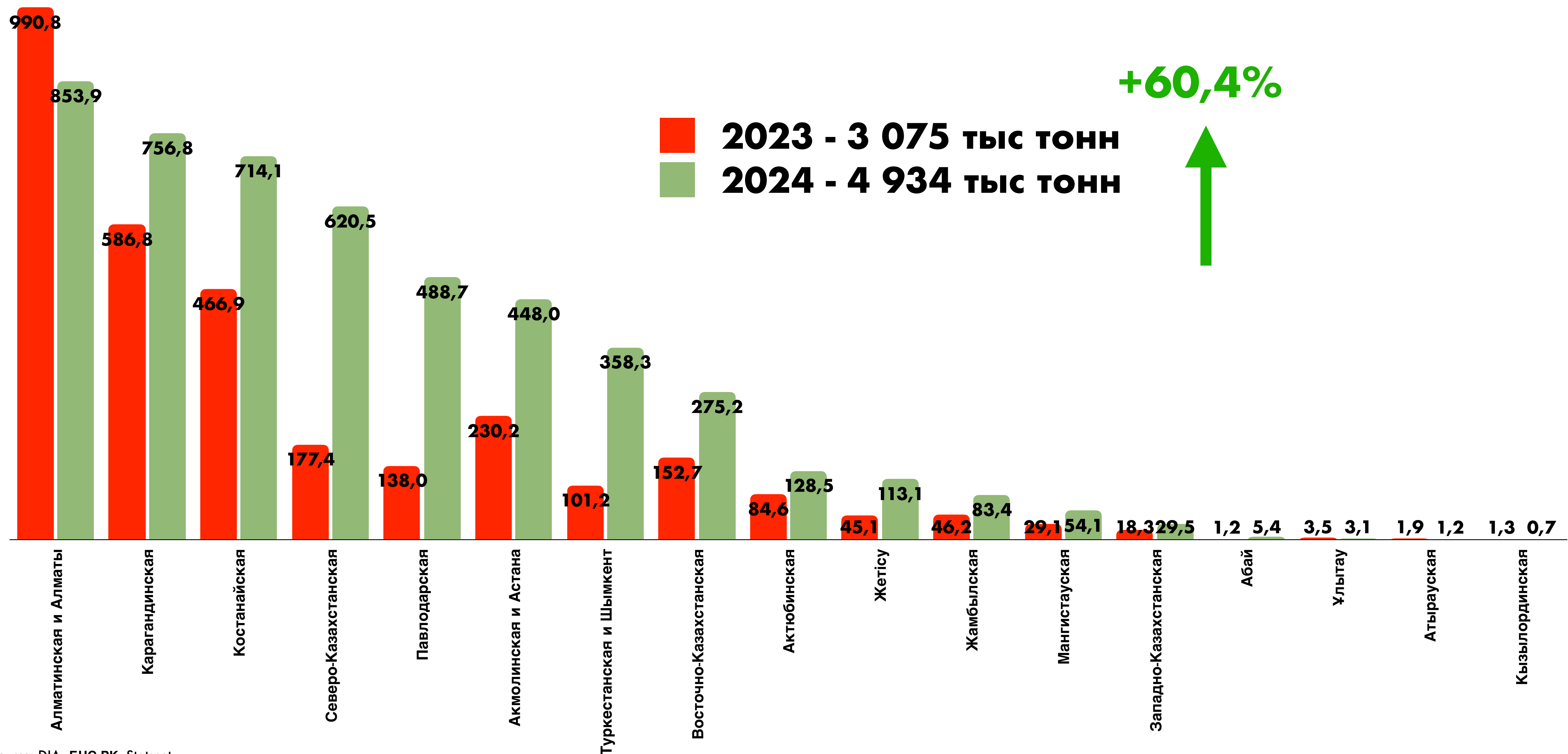
Number of Dairy plants - 145



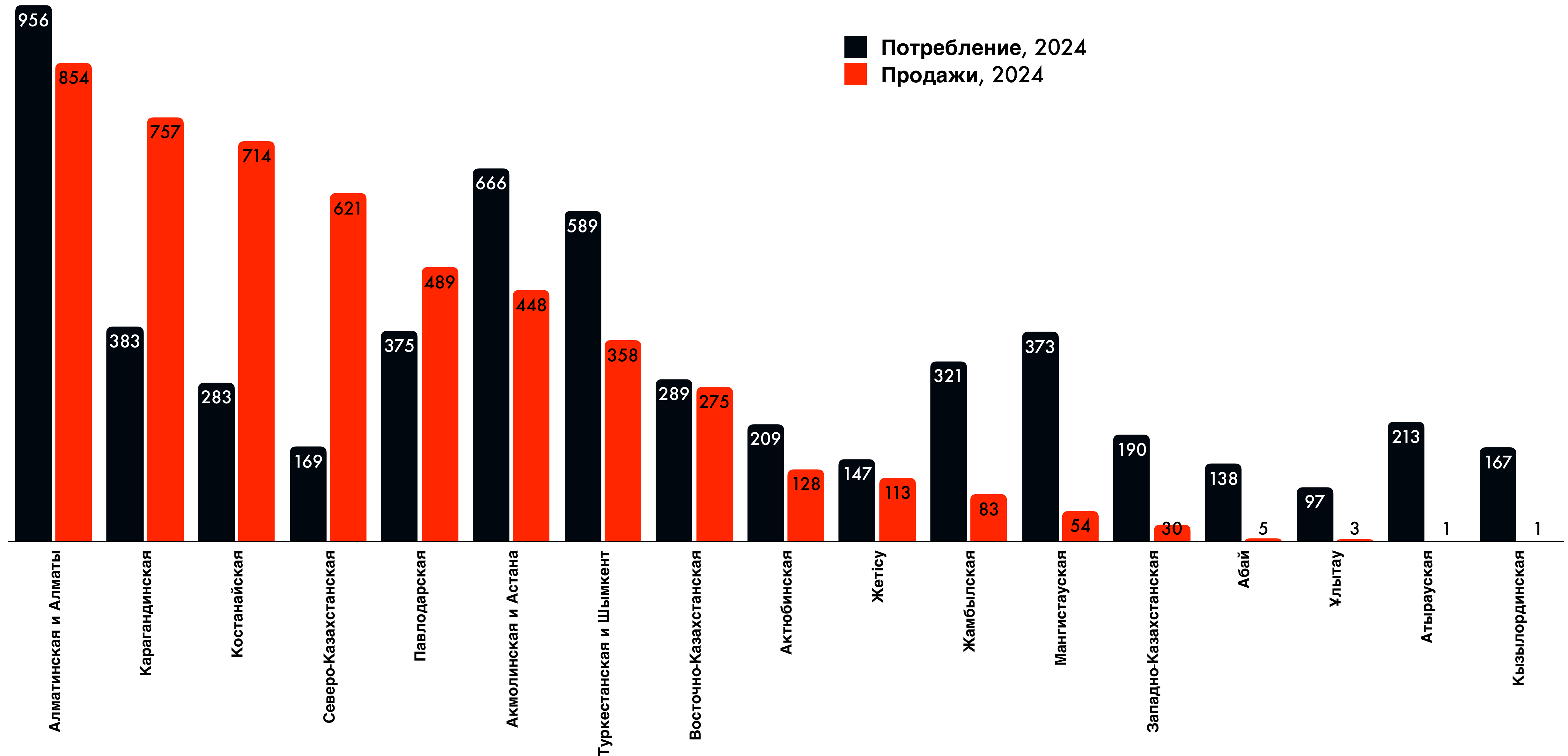
Dairy products' sales in milk equivalent



Dairy products' sales in milk equivalent, 2024



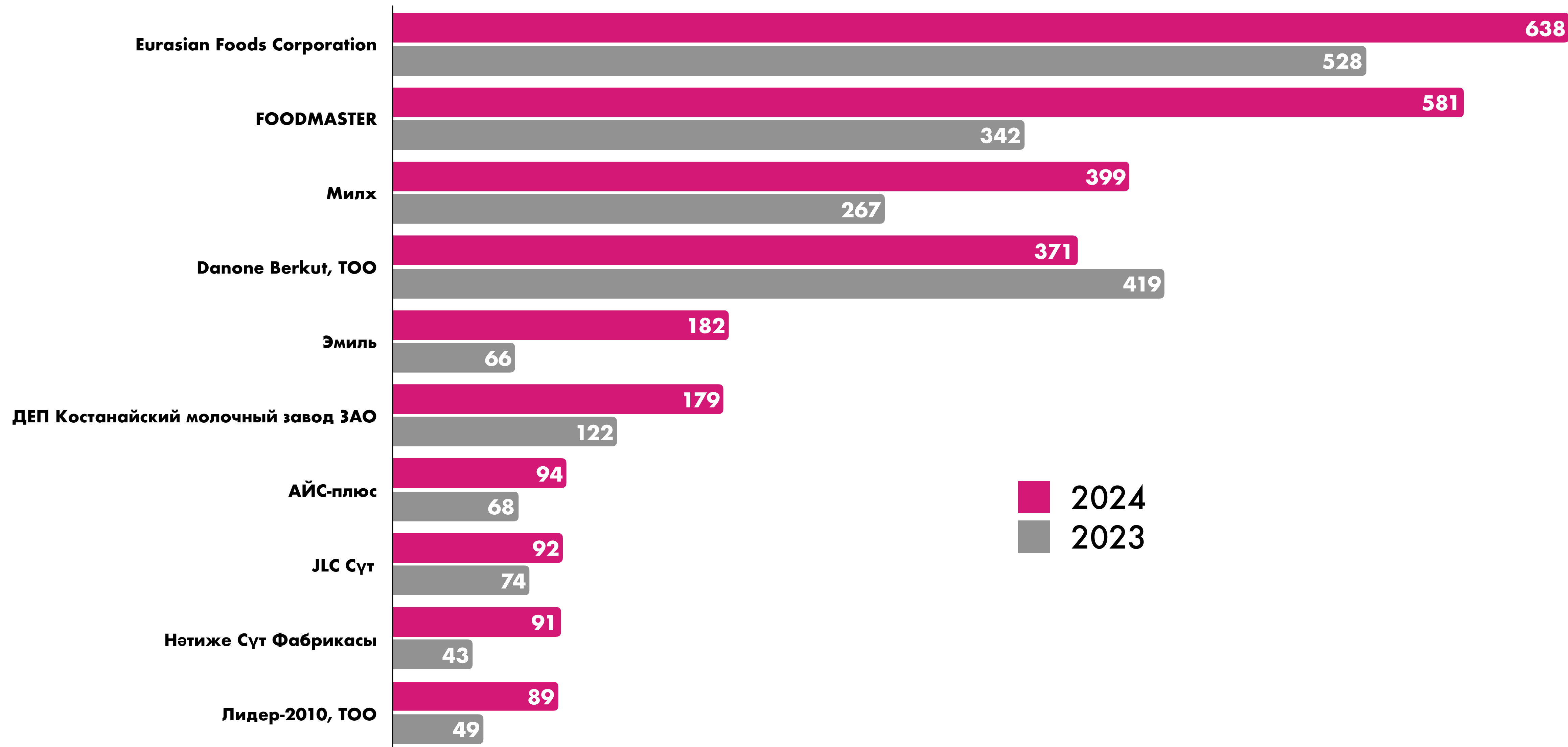
Потребление vs продажи молочных продуктов в эквиваленте



Производство сырого молока vs продажи молочных продуктов

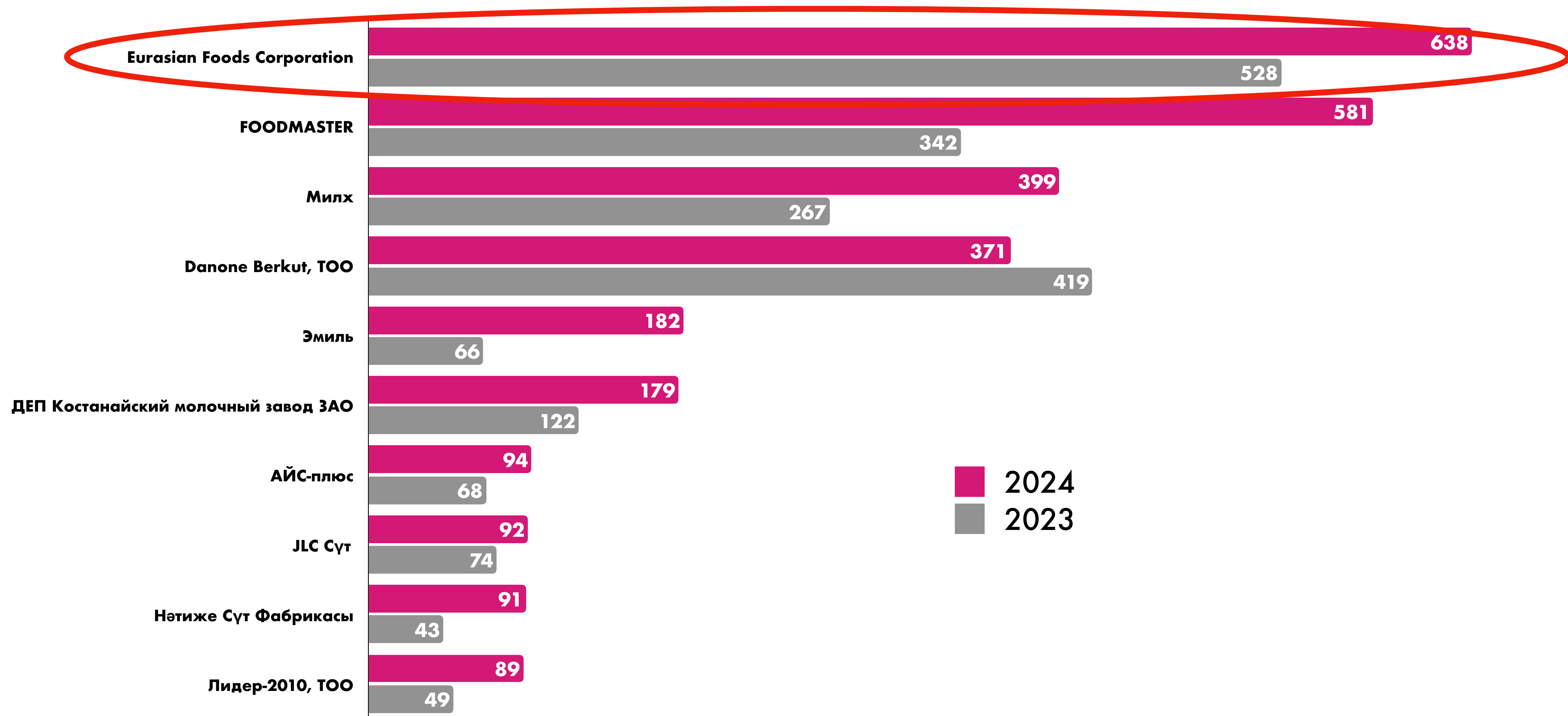


TOP-10 Dairy companies by sales in milk equivalent, kilo tons



2024
2023

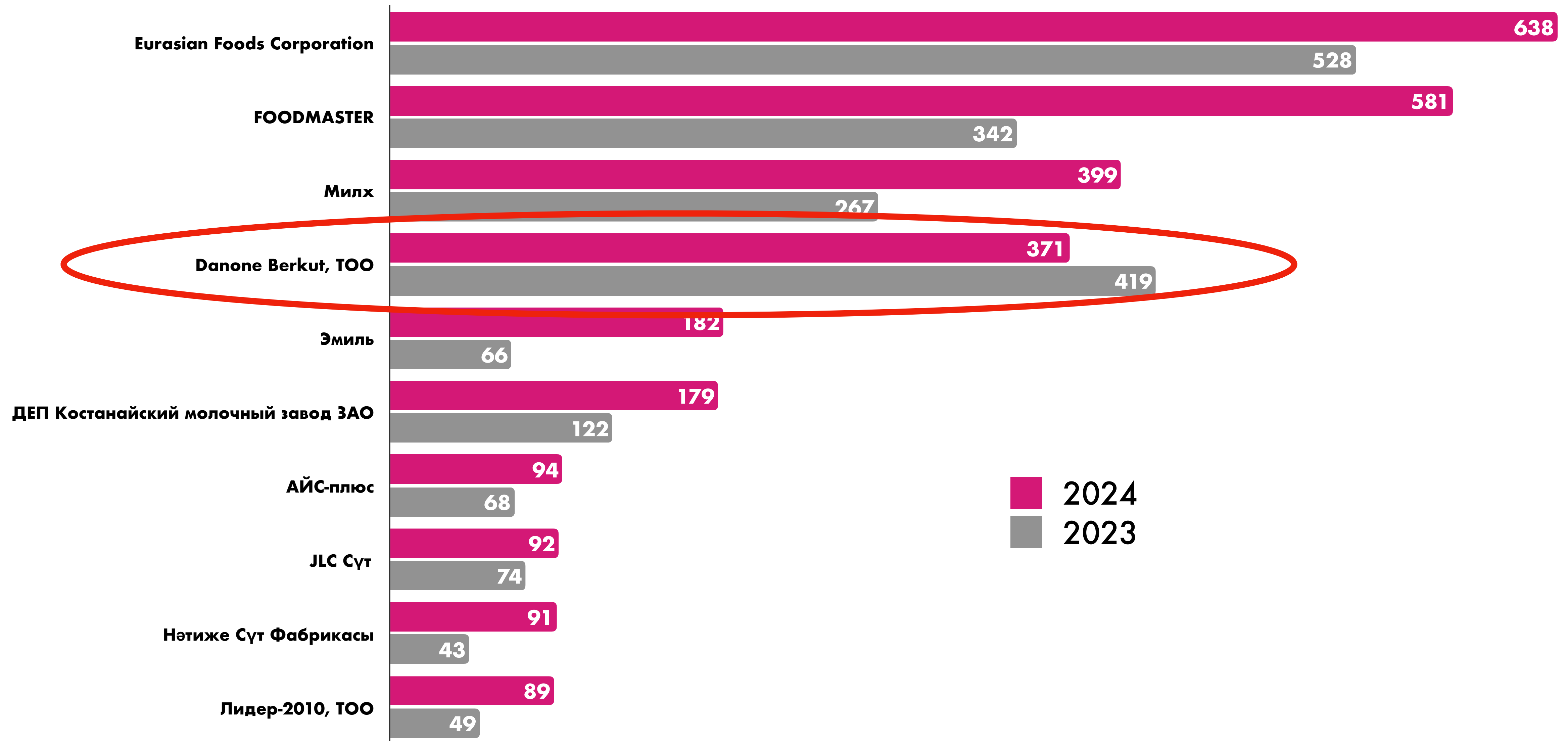
TOP-10 Dairy companies by sales in milk equivalent, kilo tons



2024
2023

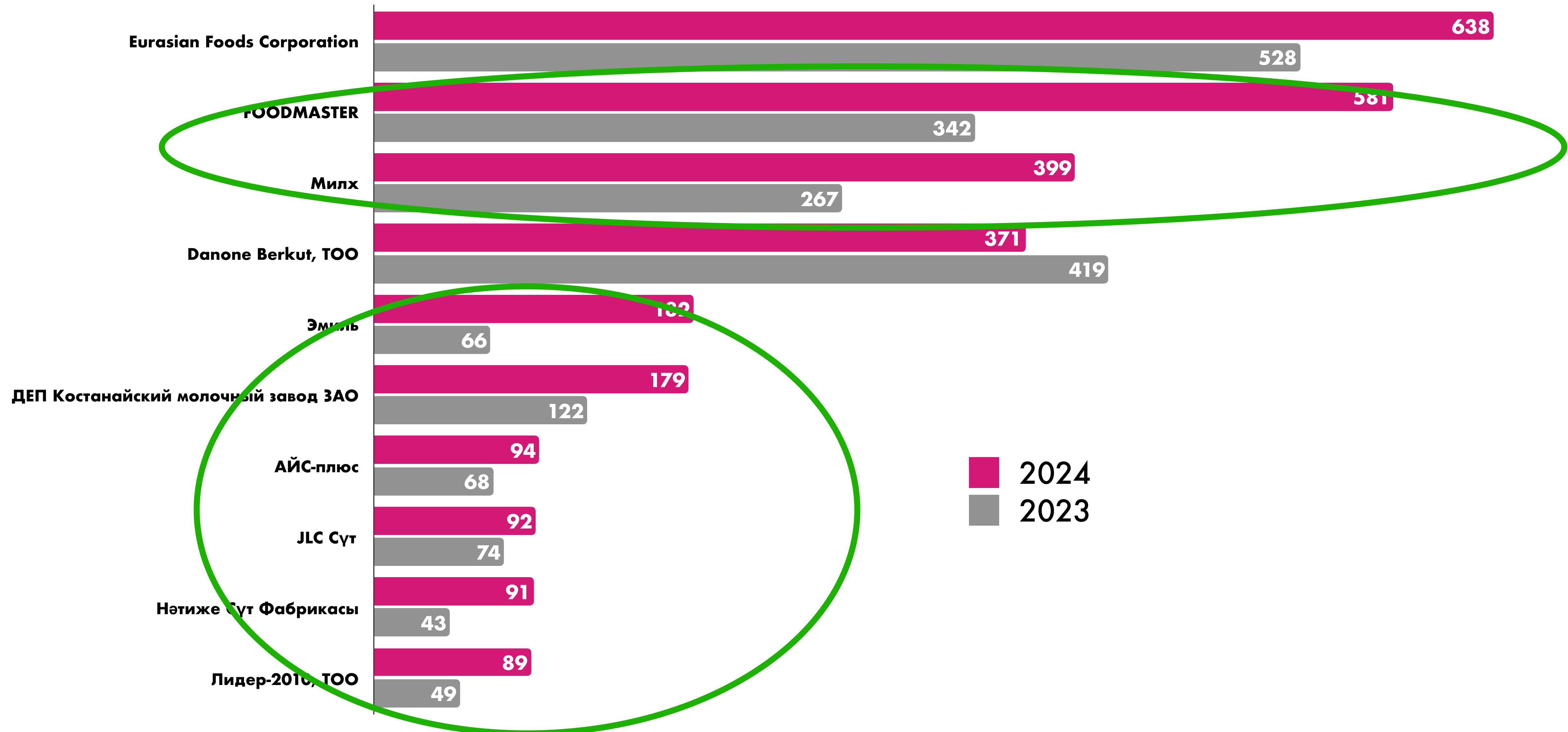


TOP-10 Dairy companies by sales in milk equivalent, kilo tons

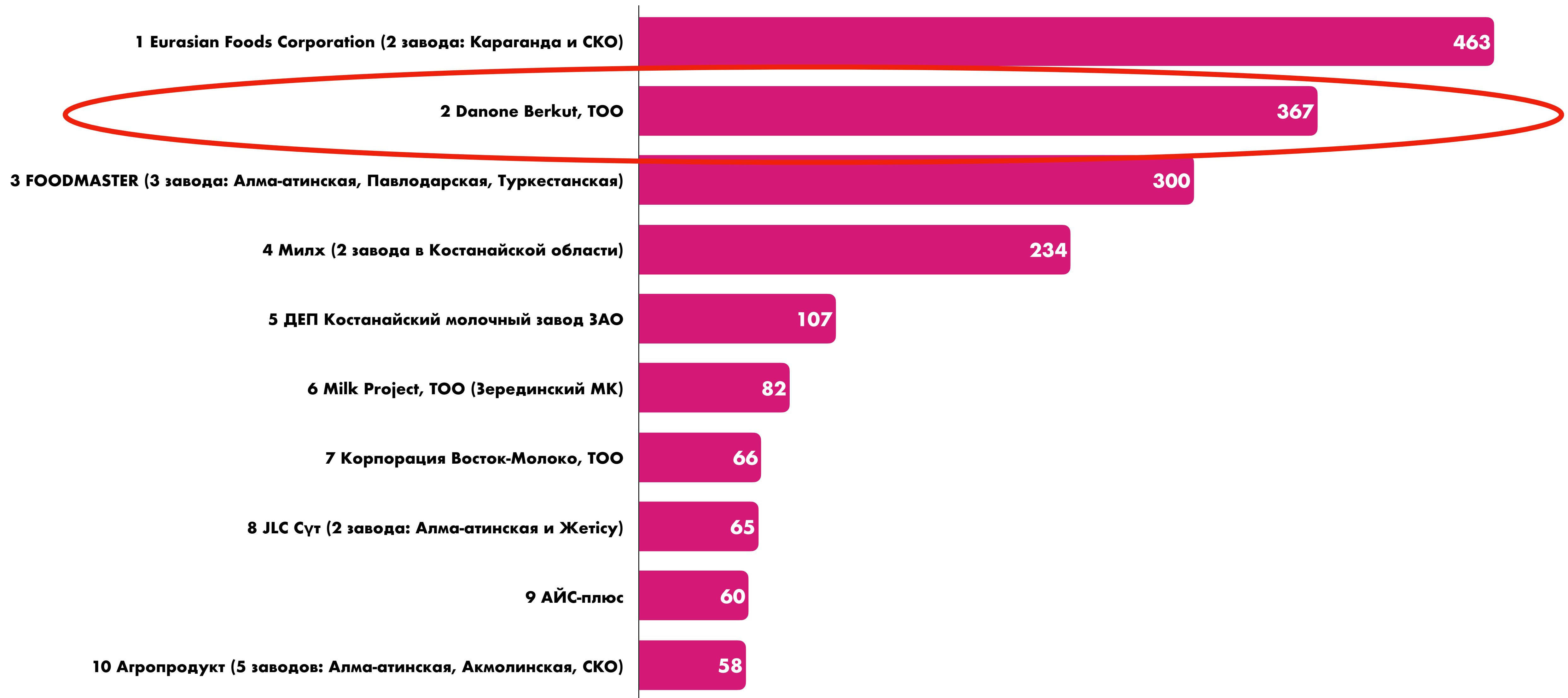




TOP-10 Dairy companies by sales in milk equivalent, kilo tons



TOP-10 Dairy companies by sales in milk equivalent, kilo tons



МАСЛО-ДЕЛ

«Для поддержки отечественных производителей, занимающихся производством и выпуском масло-жировой продукции и с целью защиты продовольственной безопасности РК от зависимости от импорта, **просим рассмотреть вопрос по введению акциза для пальмовых масел и их фракций на территорию РК в размере 250\$ (130 250 тенге) за тонну»**

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«Масло-Дел» утверждает, что **«открытие рынка В2В-сектора без нормирования трансжиров увеличит экспортный потенциал РК»**, особенно на рынках Средней Азии и Китая, где «трансжиры не нормируются». Компания подчеркивает, что реализация подобных инициатив позволит **«увеличить долю глубокой переработки растительных масел, производимых в РК»**

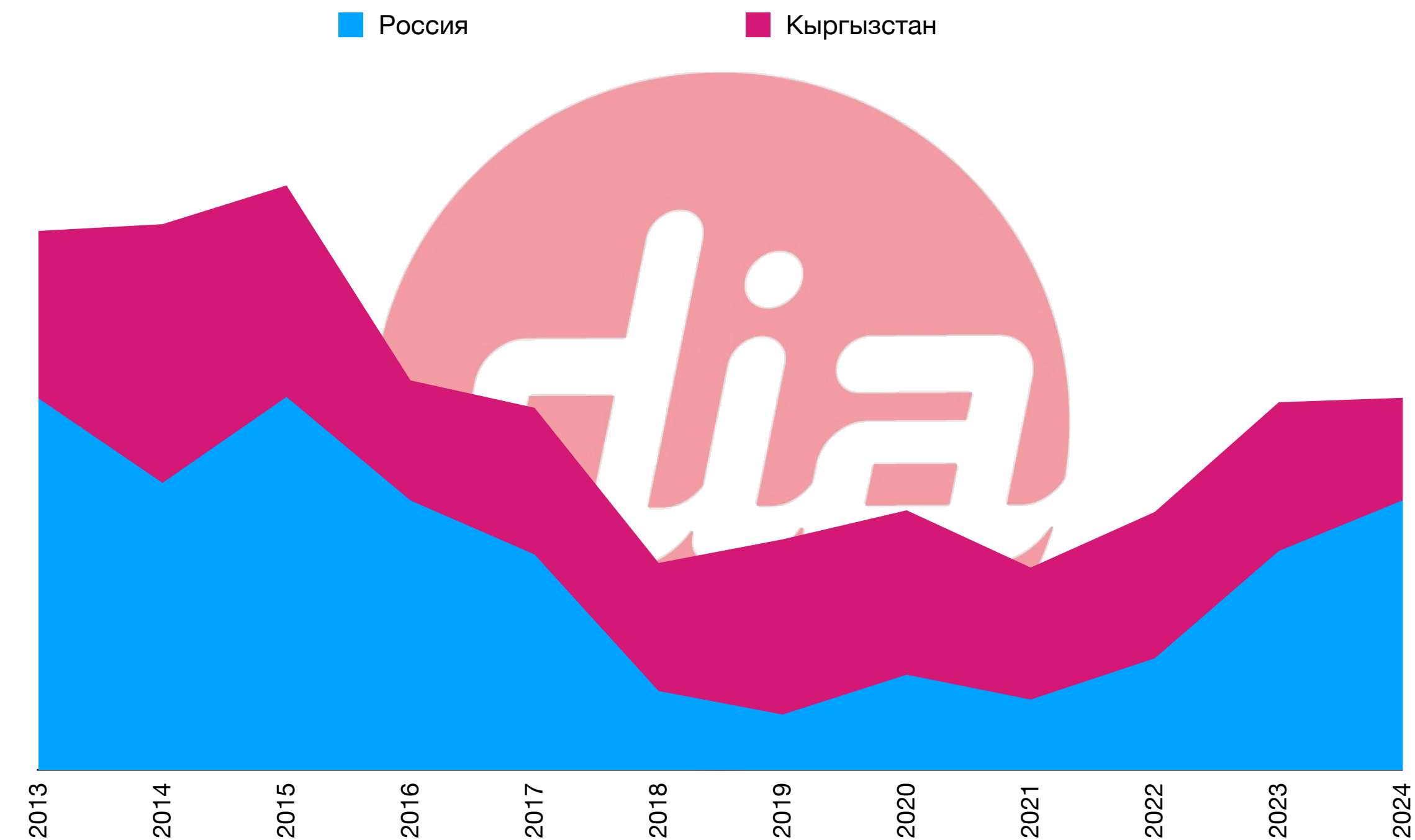
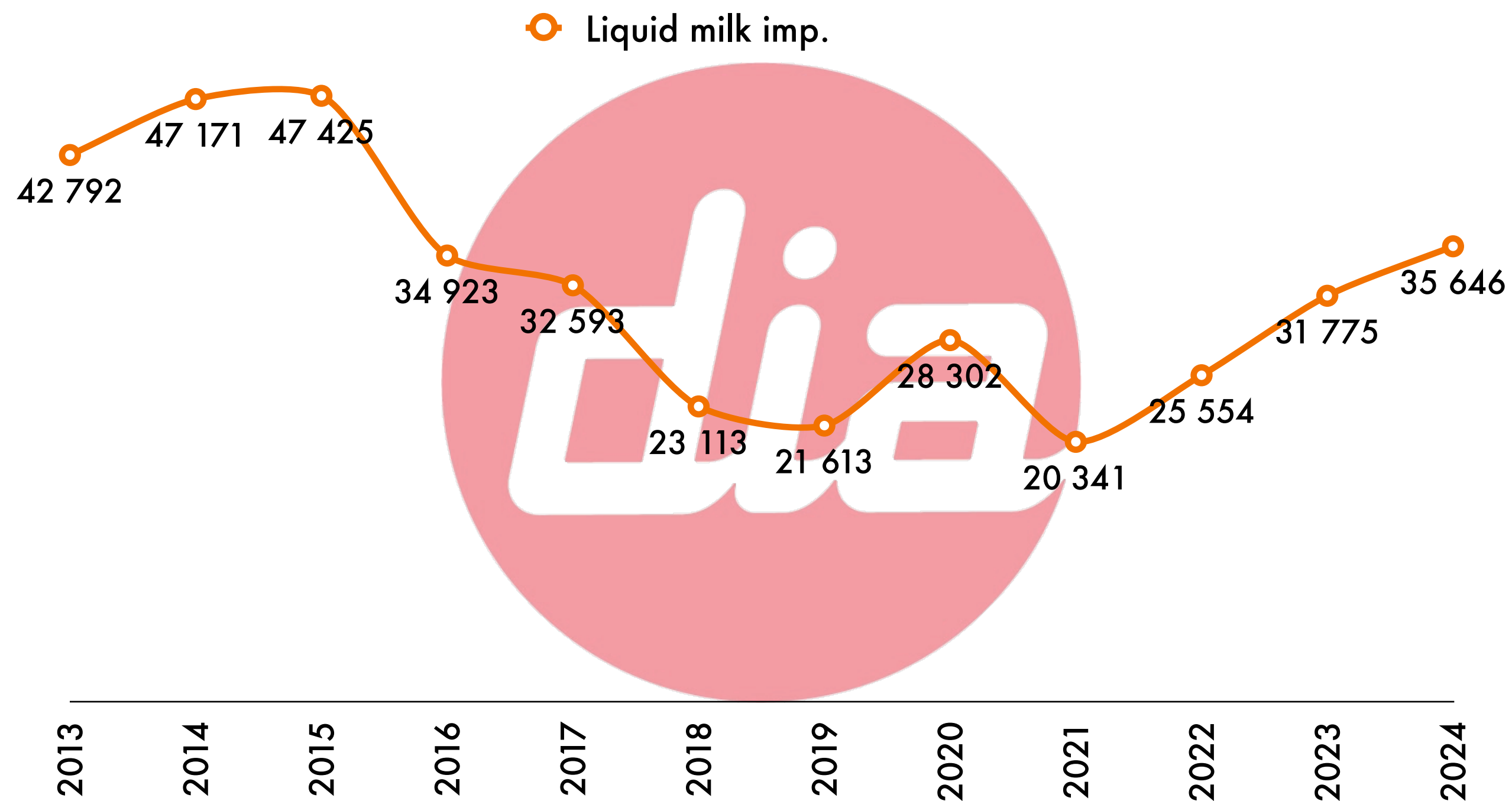
«Для поддержки отечественных производителей, занимающихся производством и выпуском масло-жировой продукции и с целью защиты продовольственной безопасности РК от зависимости от импорта, **просим рассмотреть вопрос по введению акциза для пальмовых масел и их фракций на территорию РК в размере 250\$ (130 250 тенге) за тонну»**»

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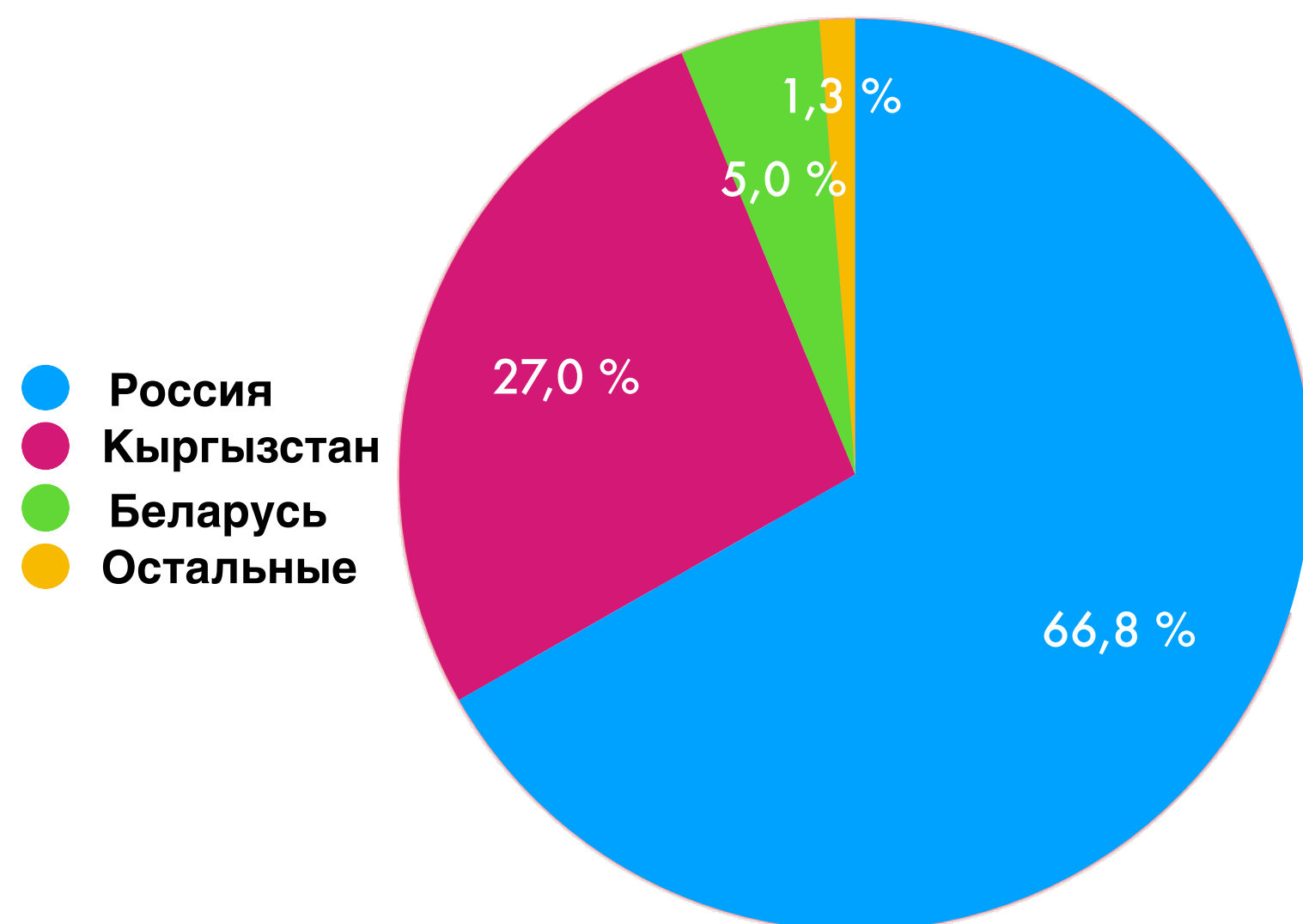
Масложировой союз России провел исследование жировой продукции компании «Масло-дел», поставляемой на территорию РФ: **«Мы нашли и официально подтвердили, что продукция компании “Масло-дел” не соответствует требованиям по трансизомерам. Эти нарушения зафиксированы документально»**.

После получения результатов проверки документы были переданы в Роспотребнадзор, который провел контрольные мероприятия в отношении российских компаний-перепродавцов и производителей.

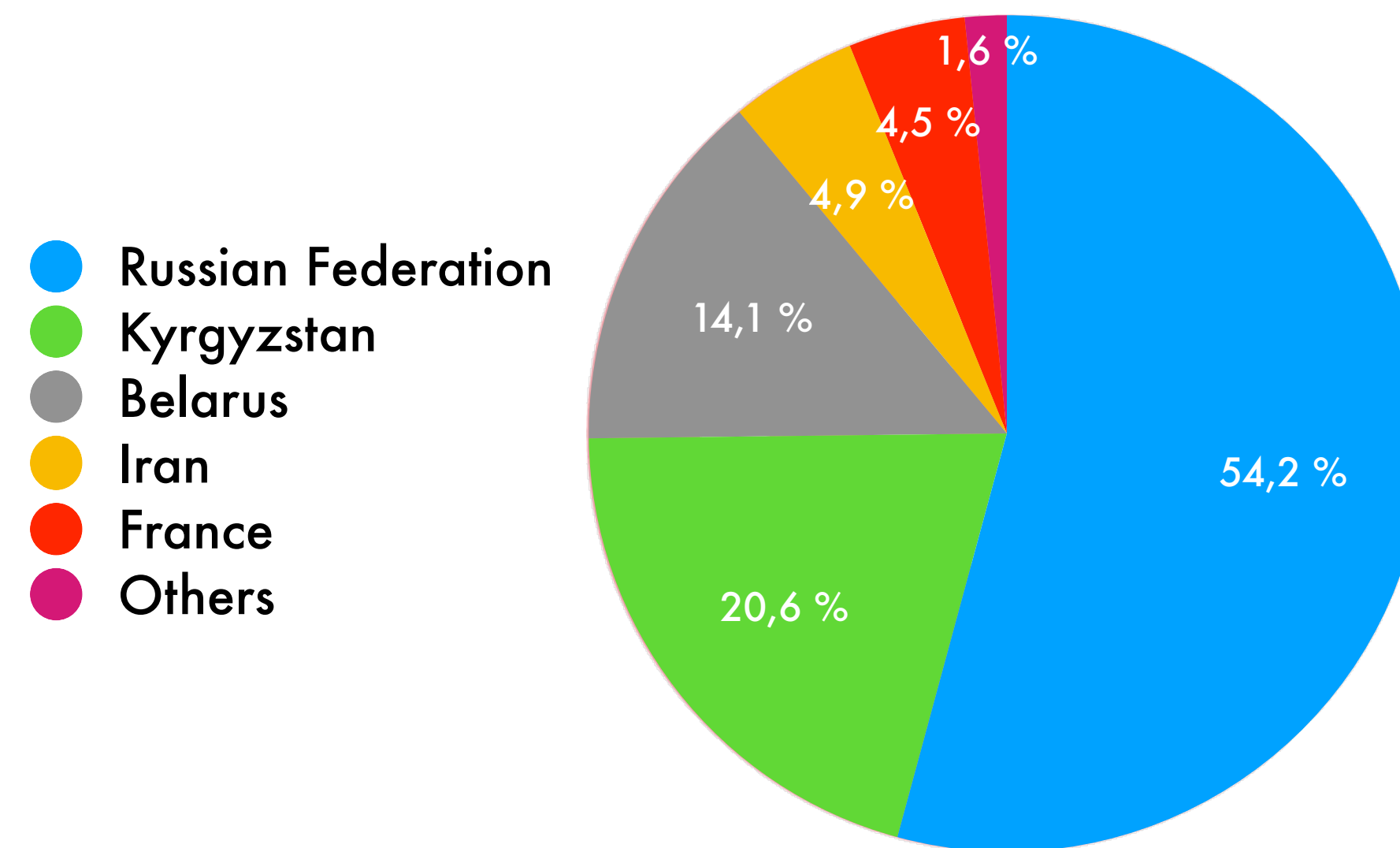
Импорт

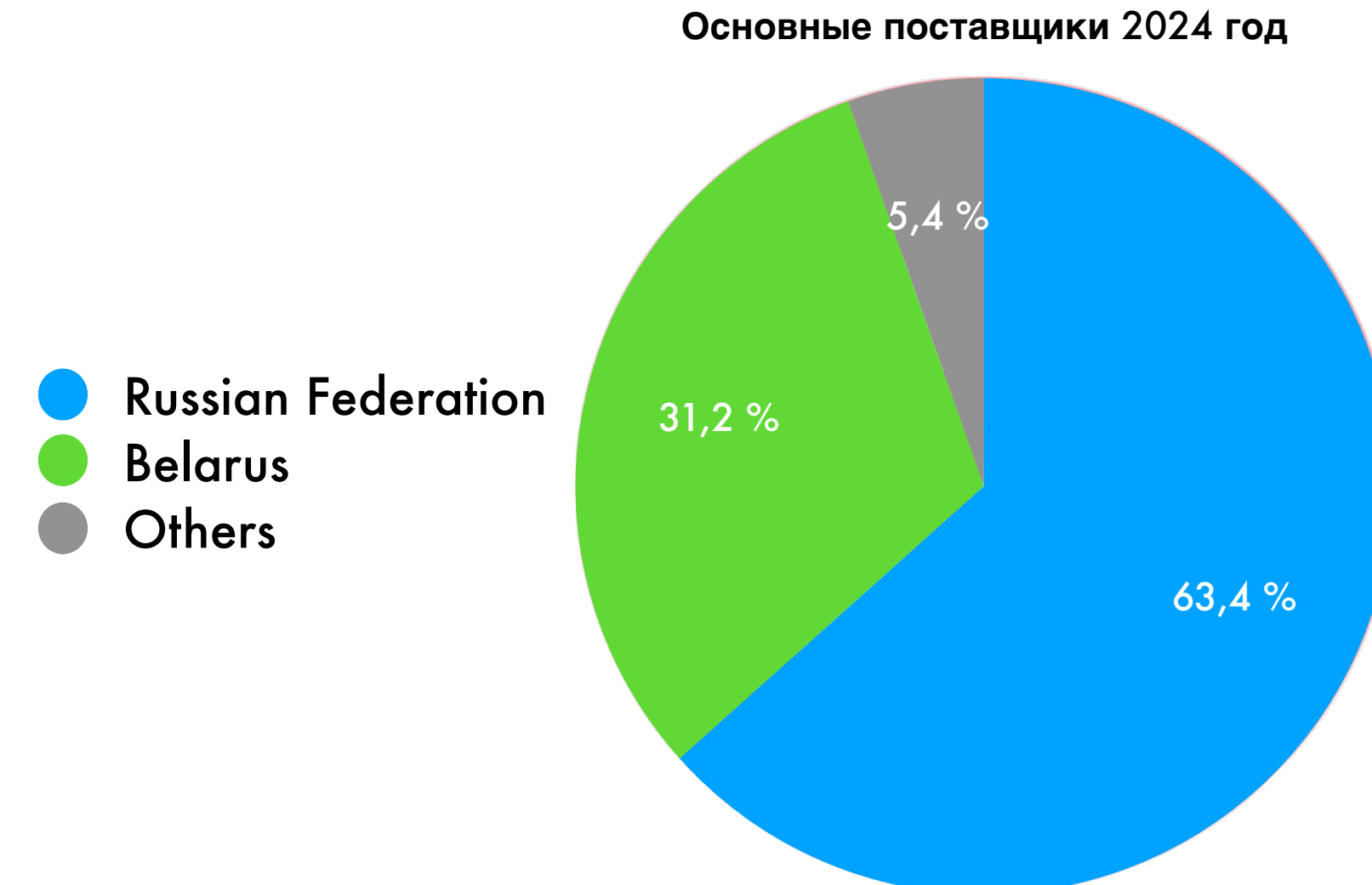
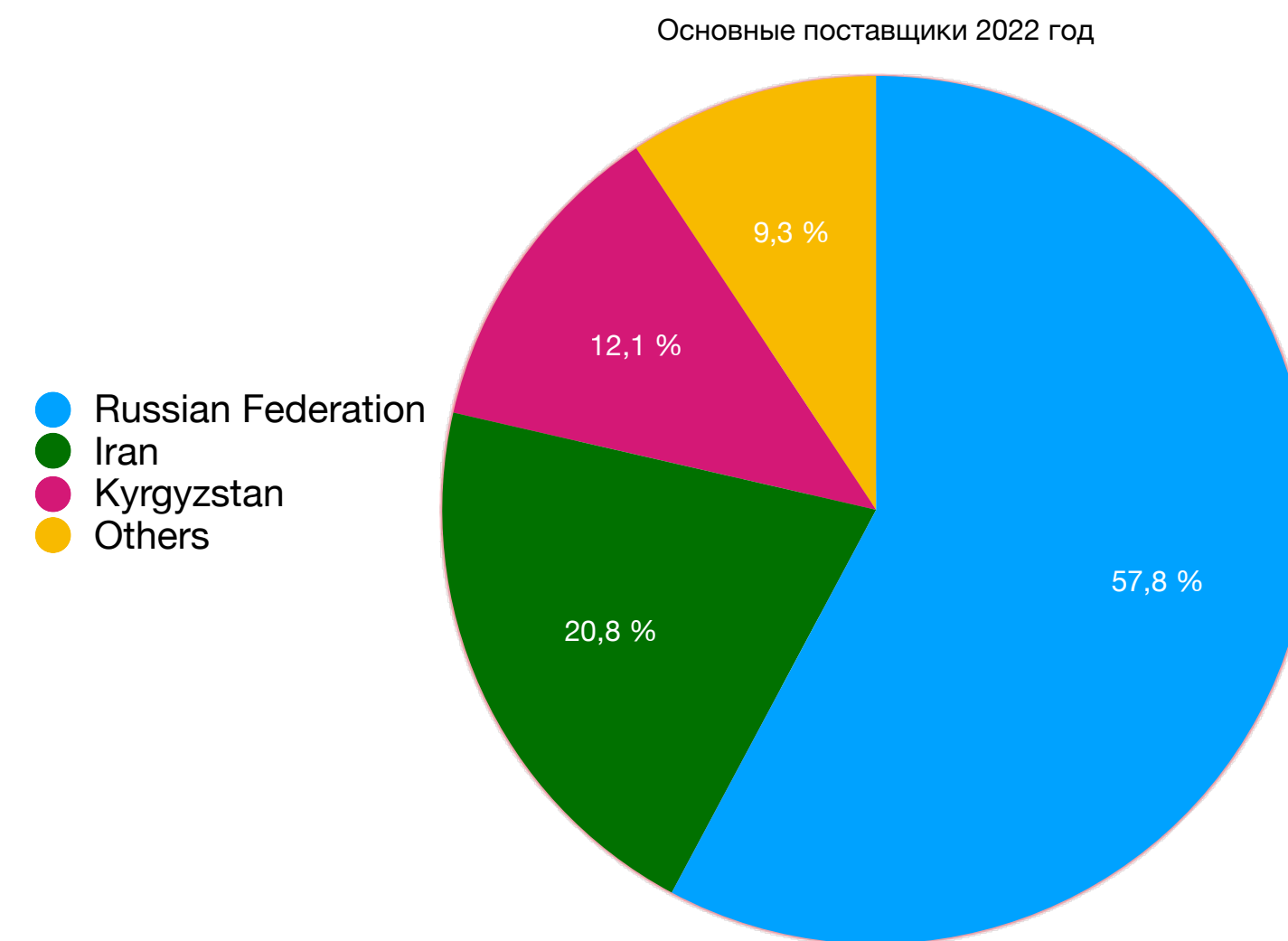
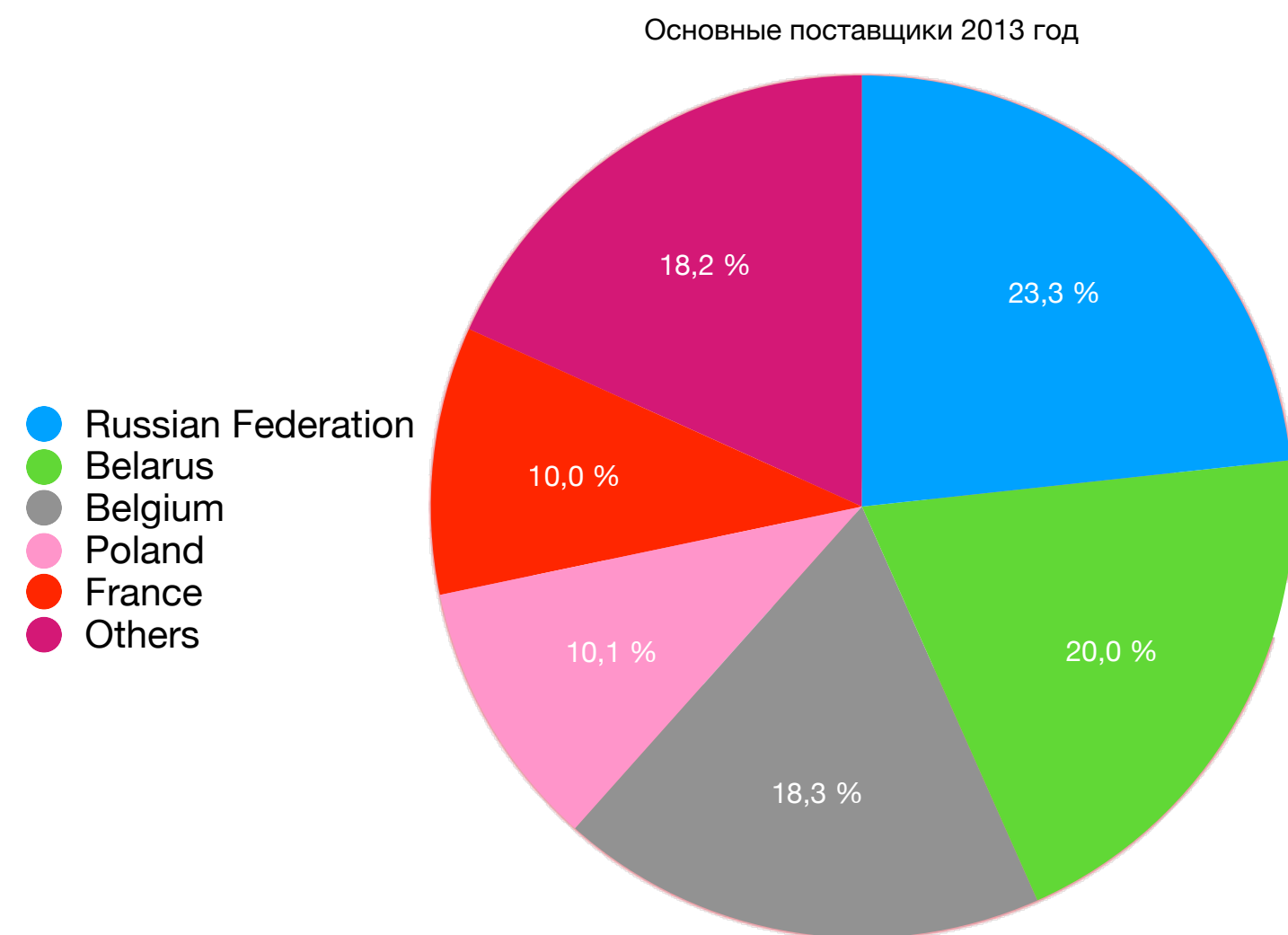
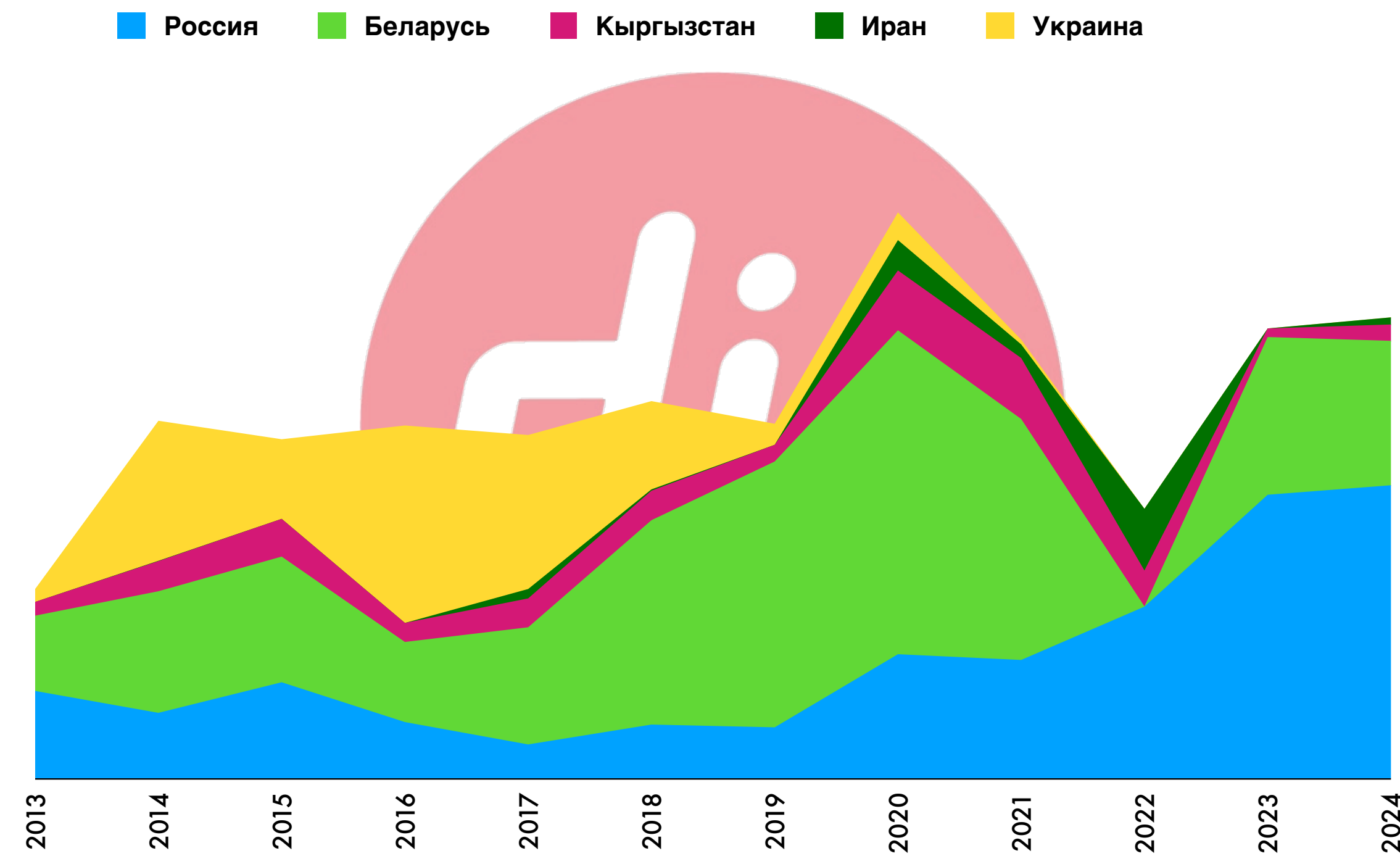
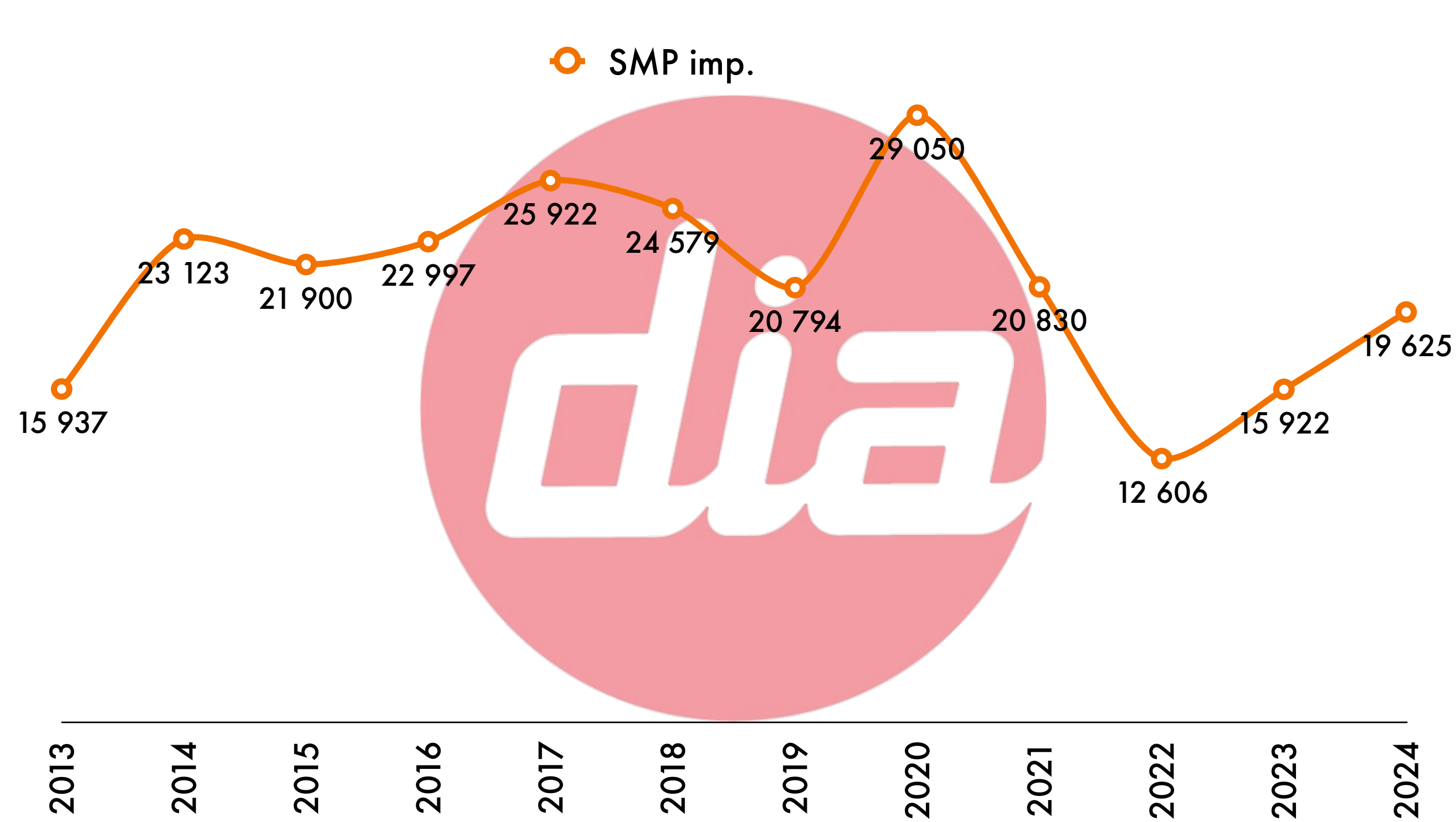


Основные поставщики 2013 год

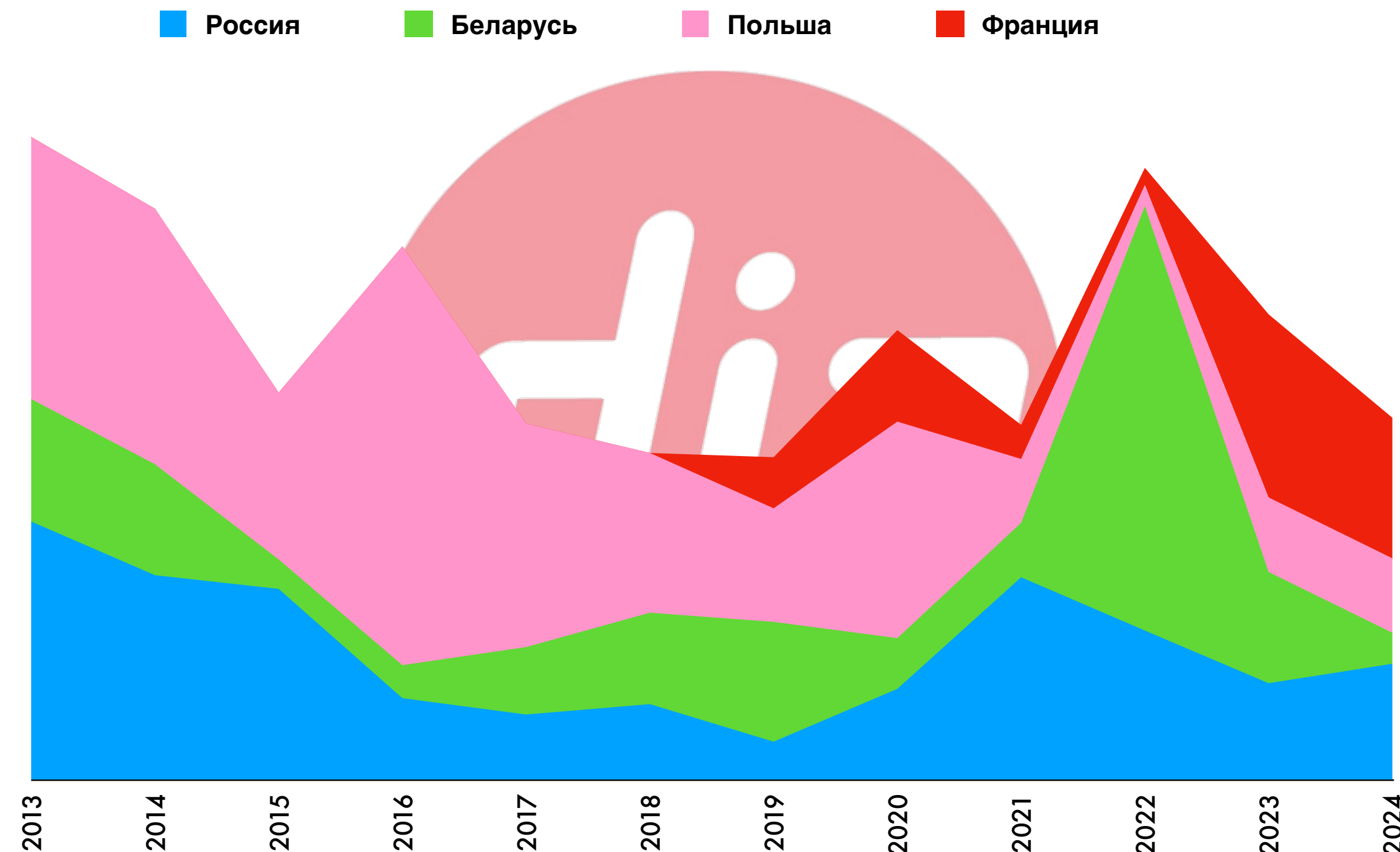
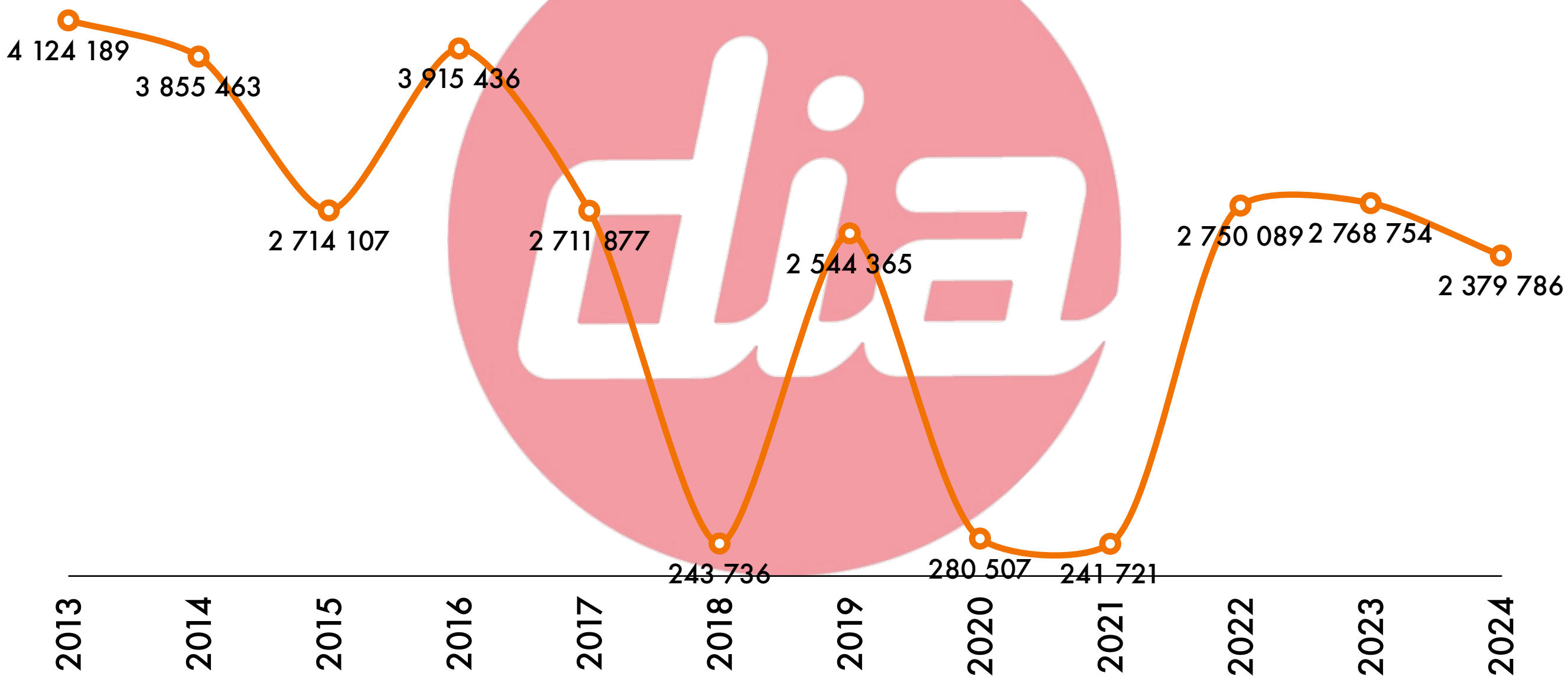


Основные поставщики 2024 год

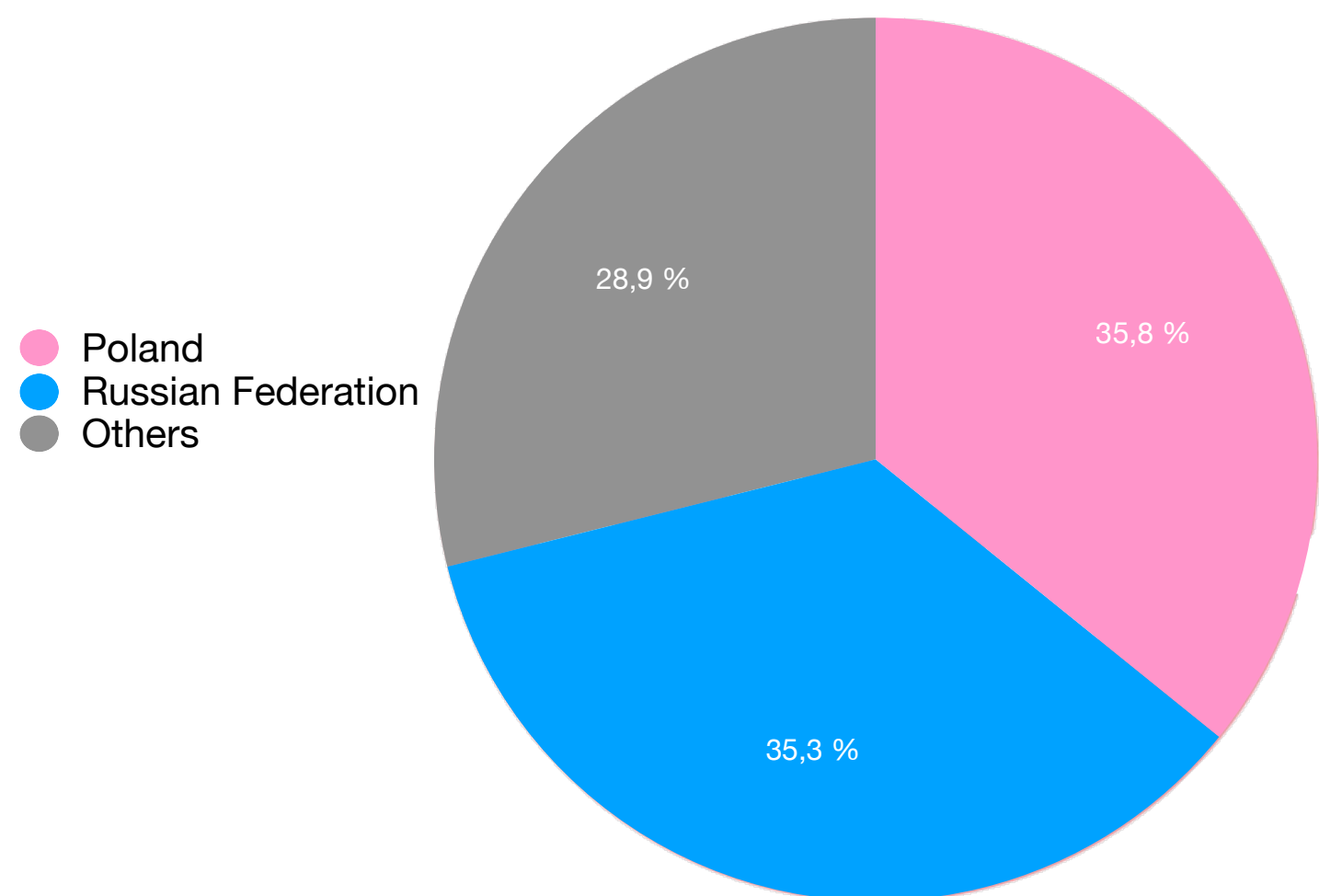




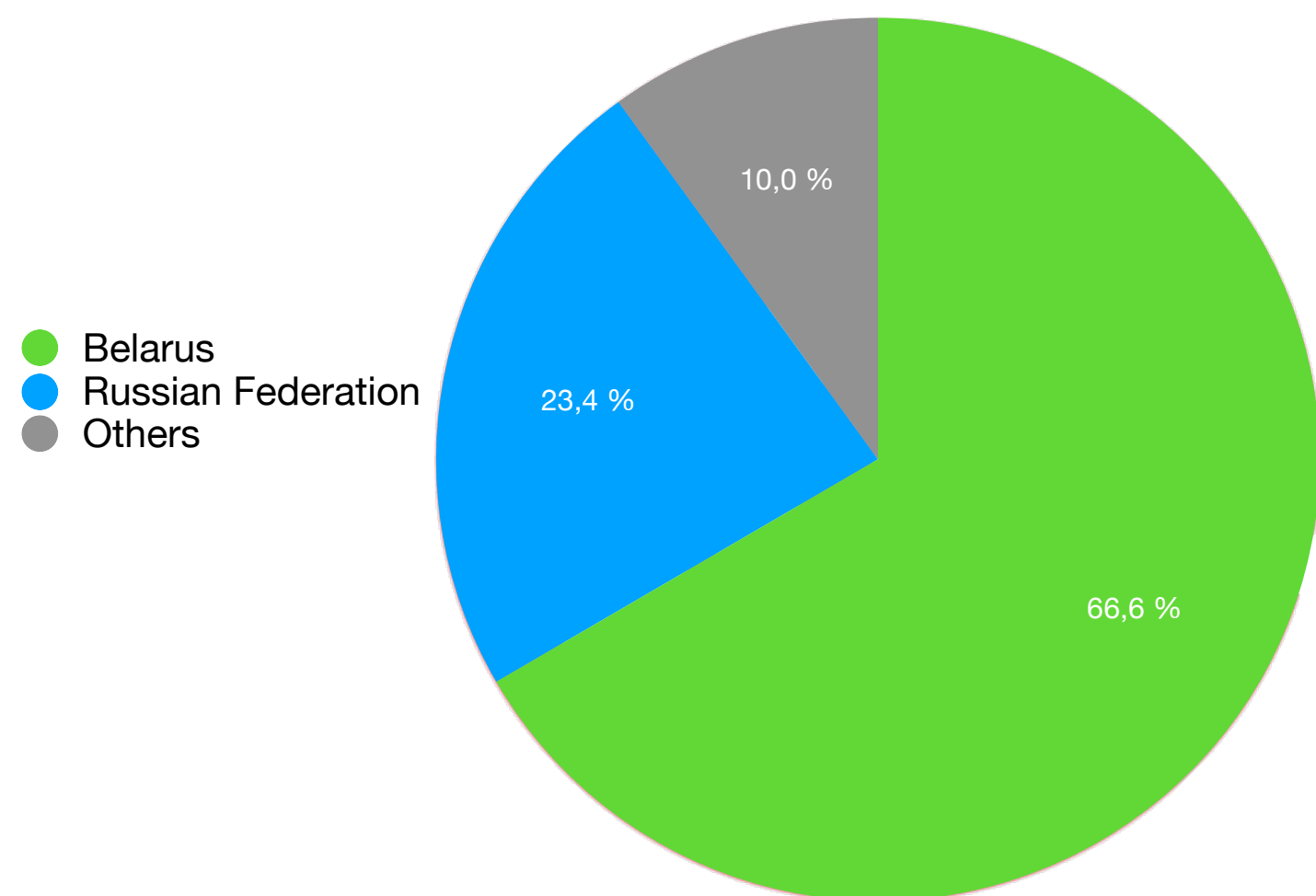
WMP Imp.



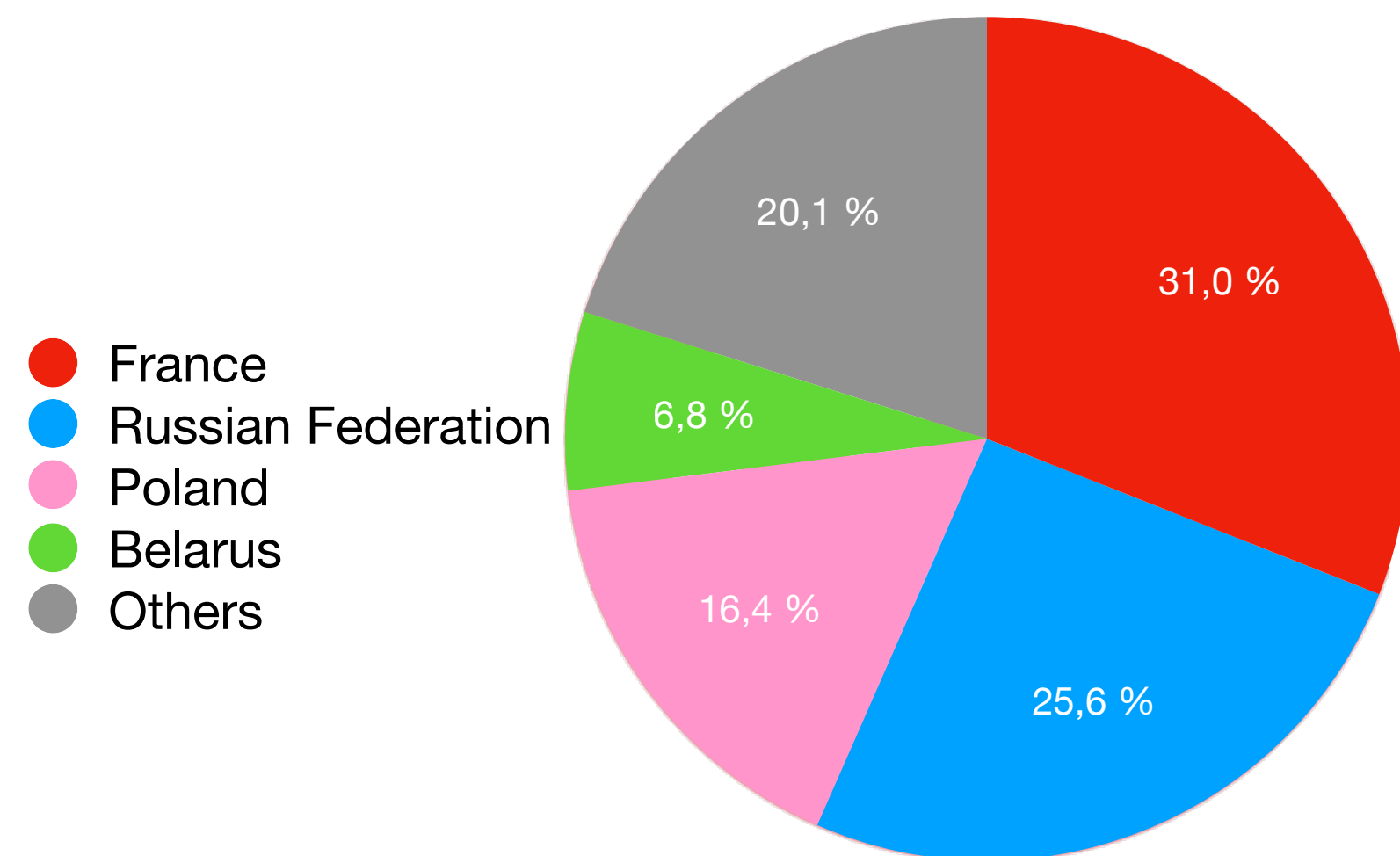
Основные поставщики 2013 год



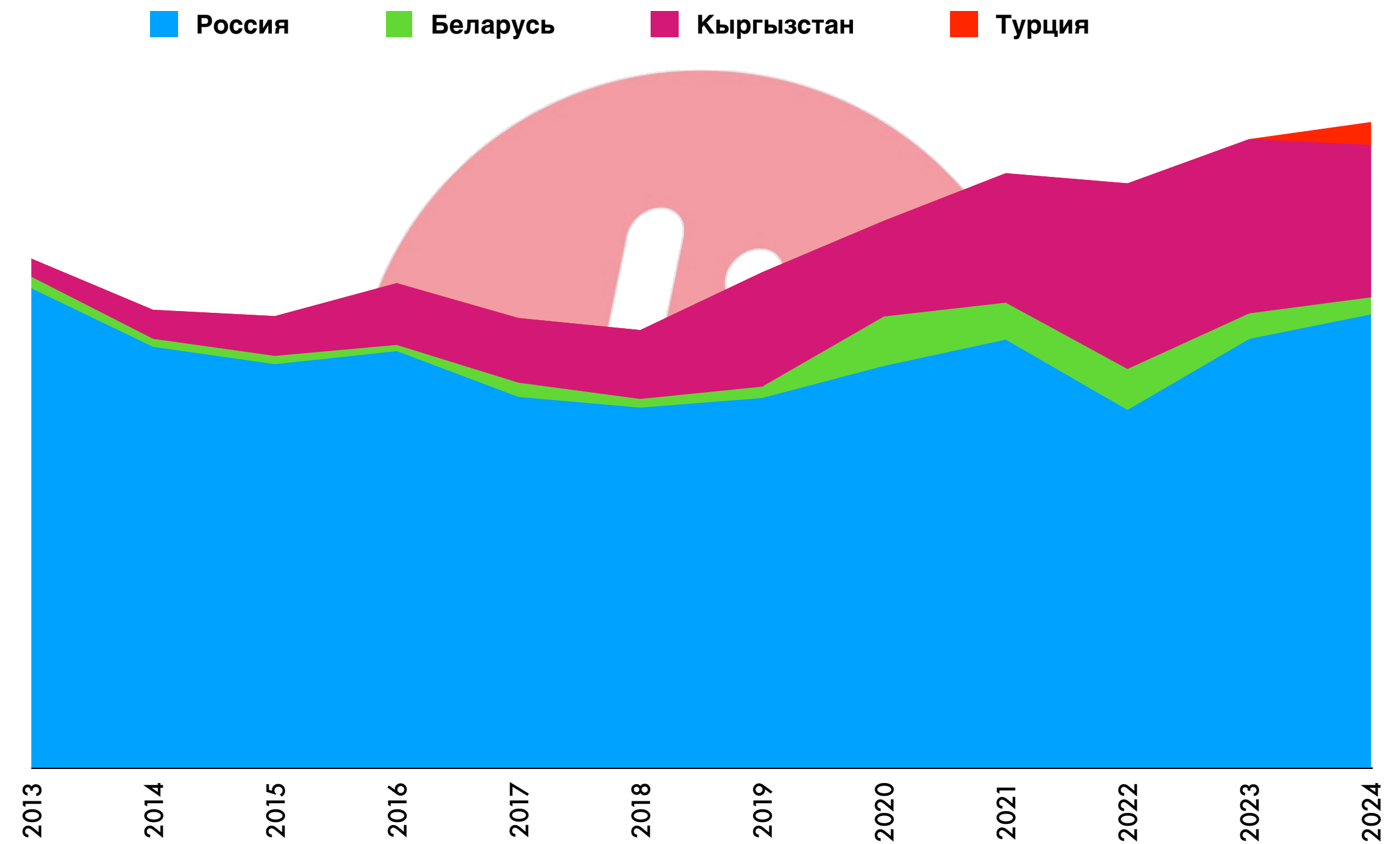
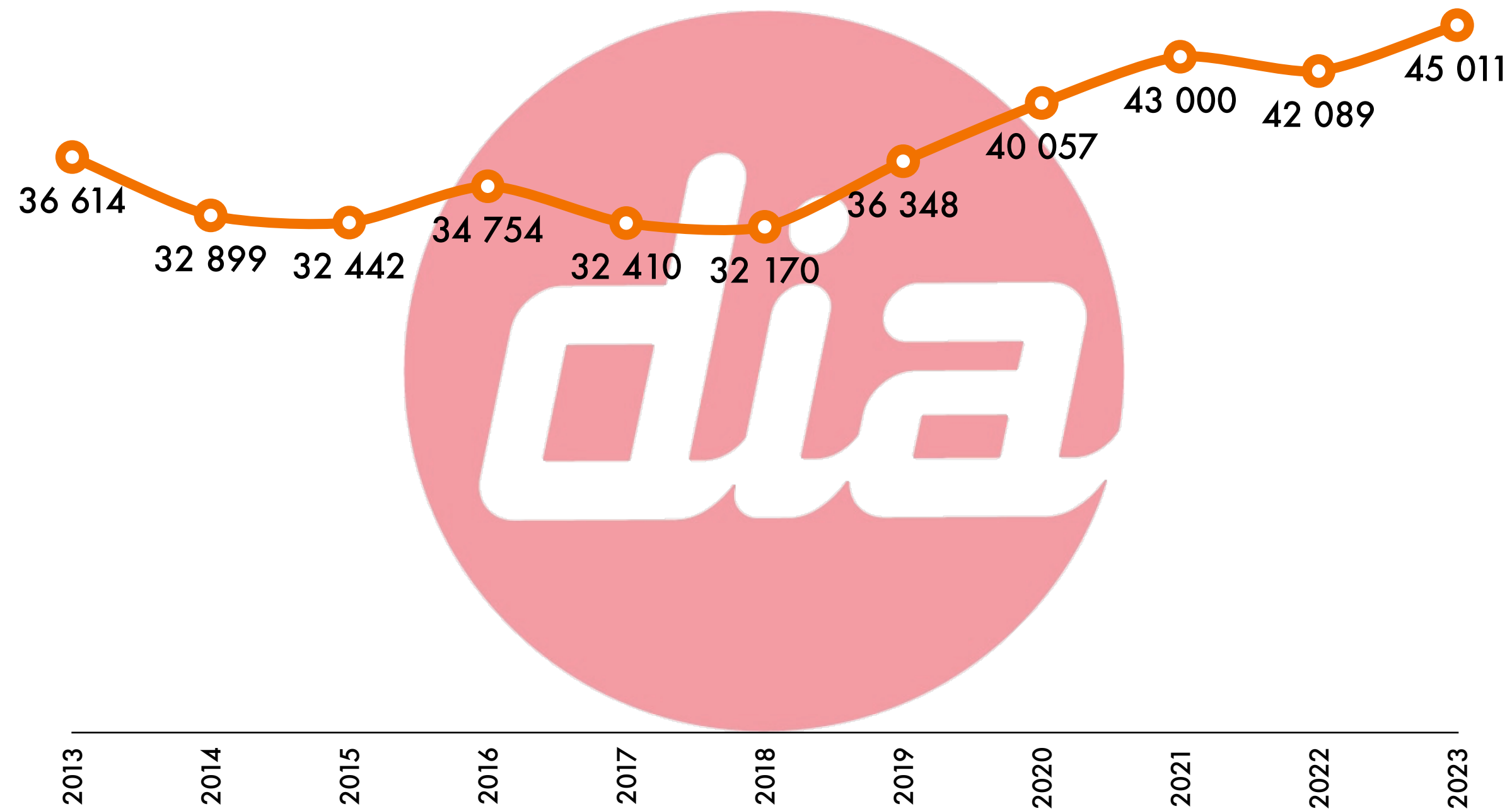
Основные поставщики 2022 год



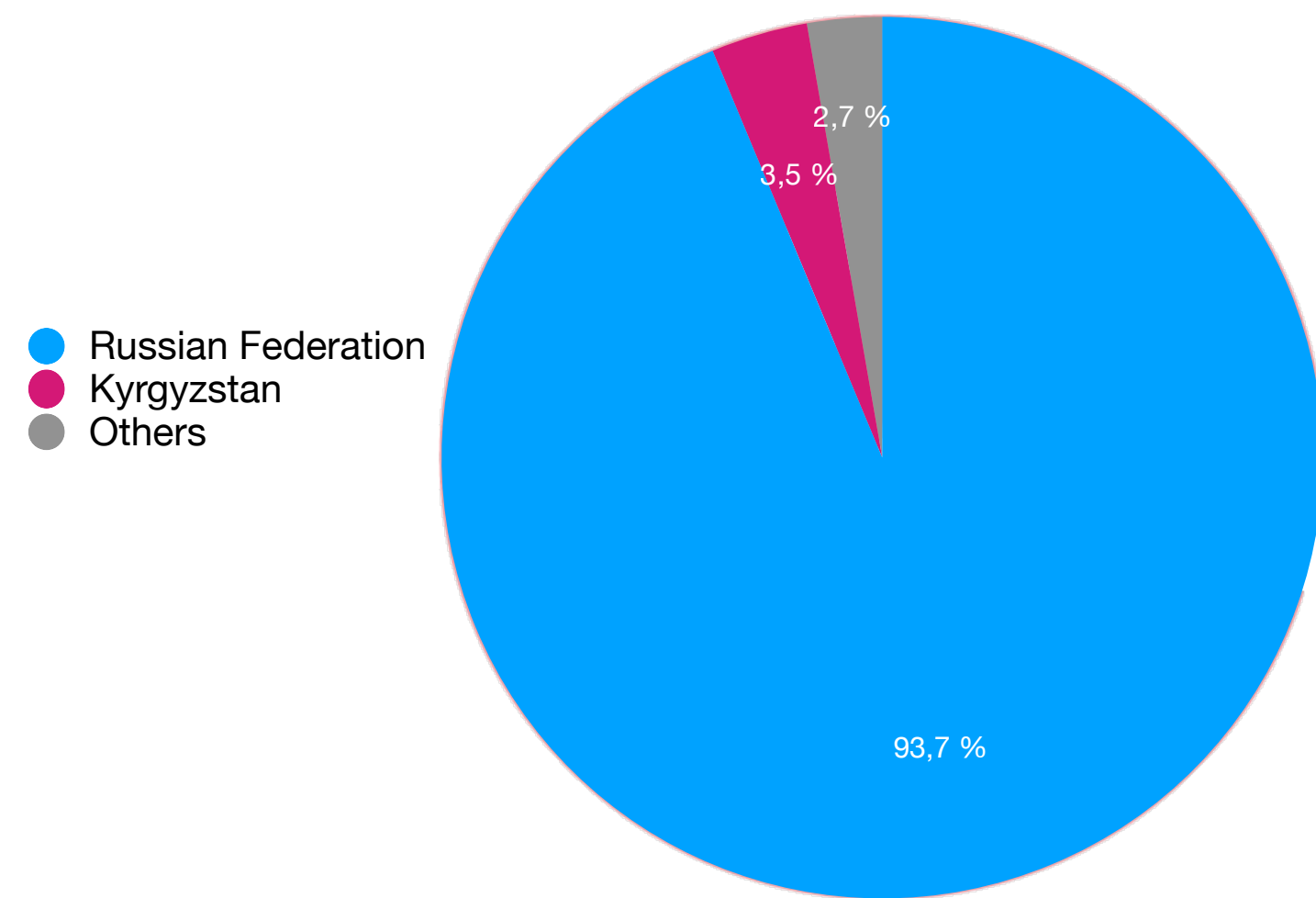
Основные поставщики 2024 год



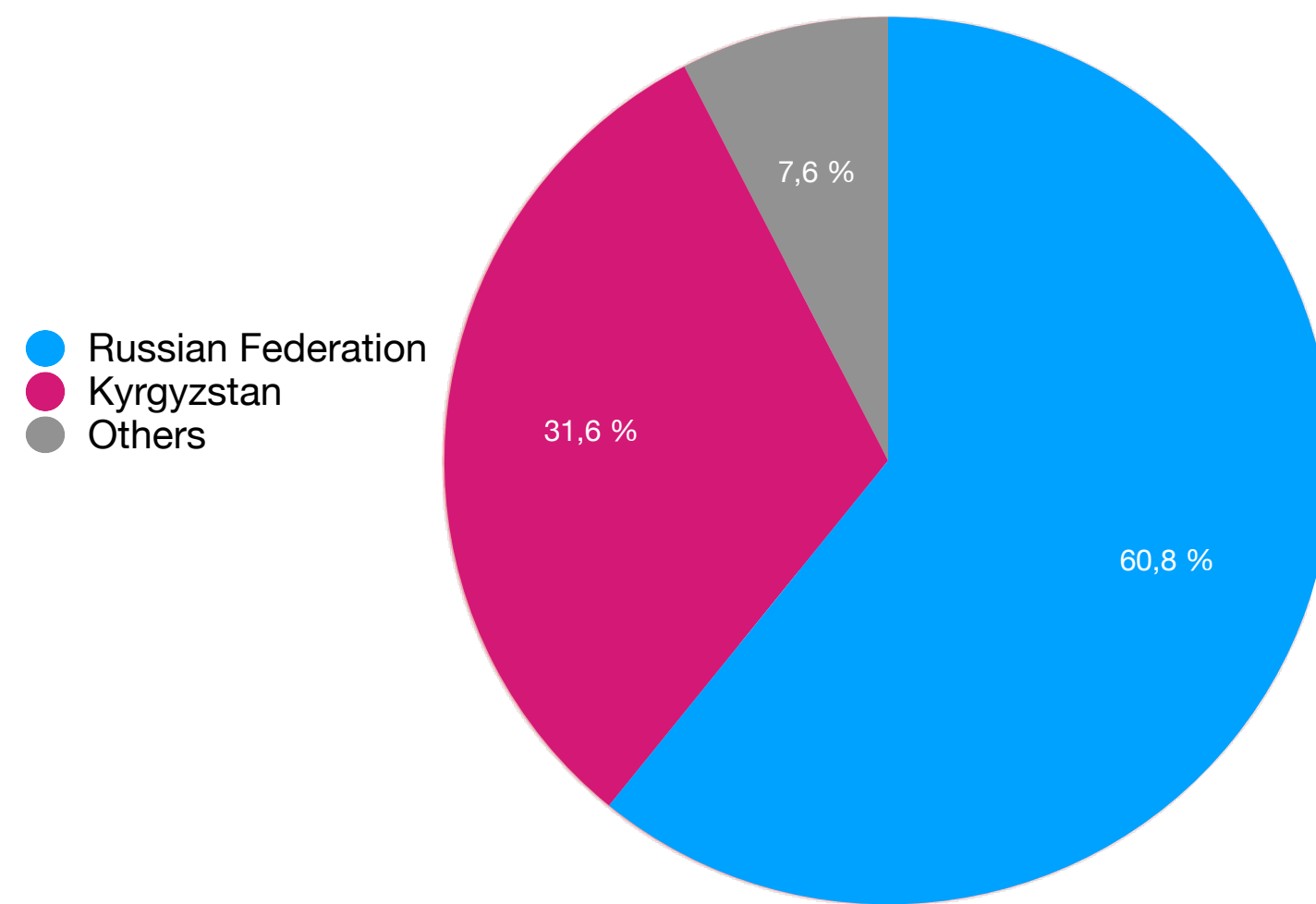
Fermented Products Import



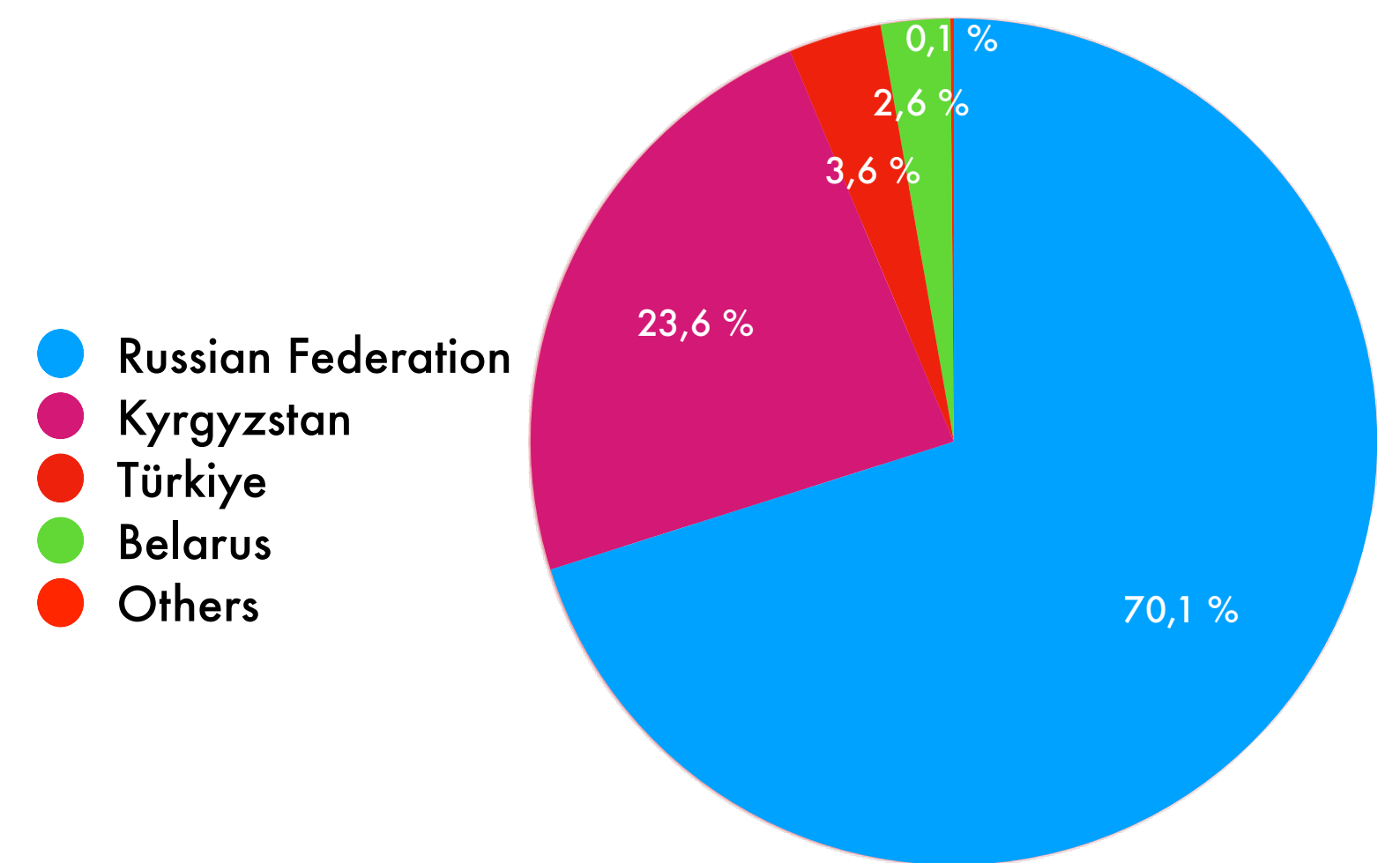
Основные поставщики 2013 год



Основные поставщики 2022 год

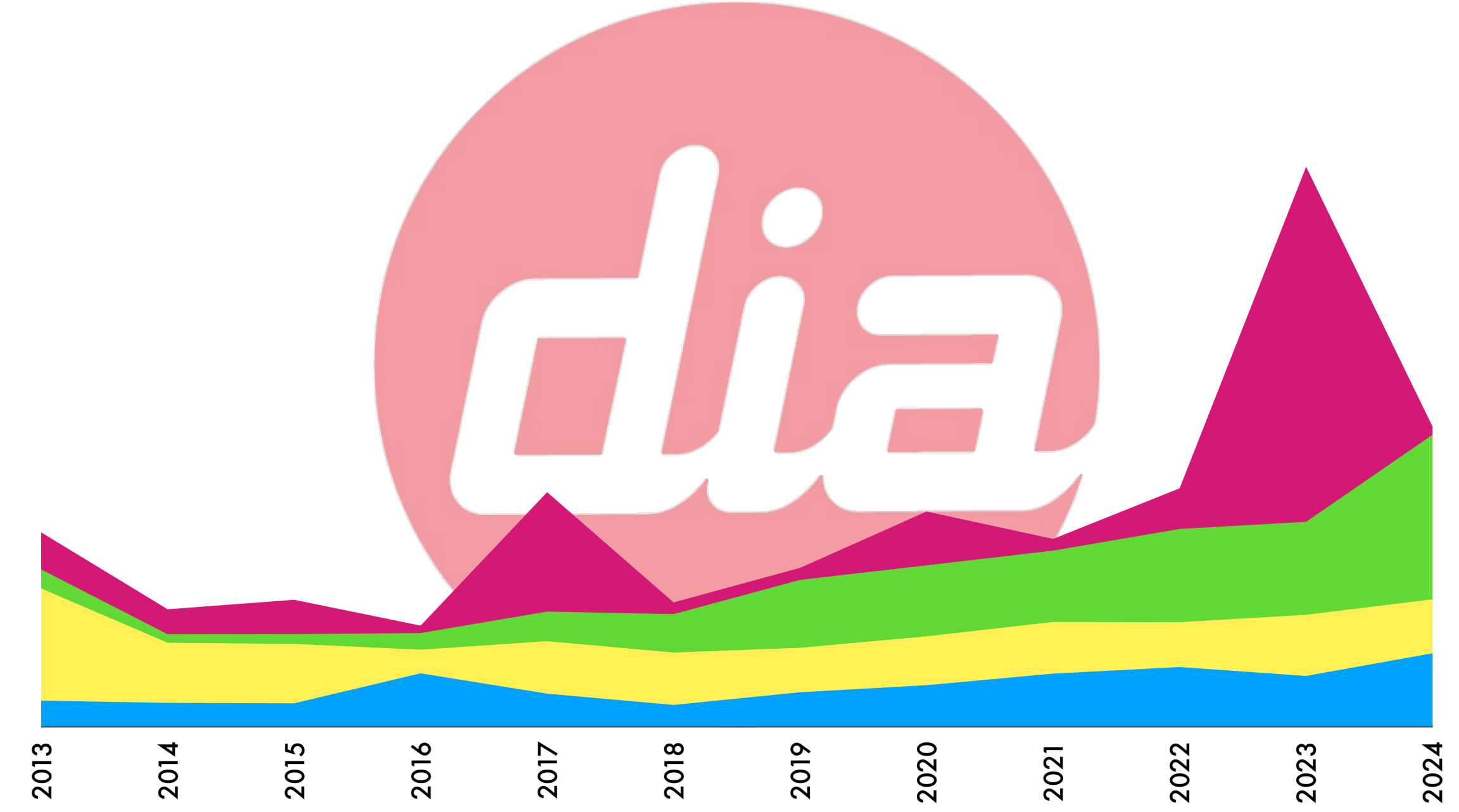
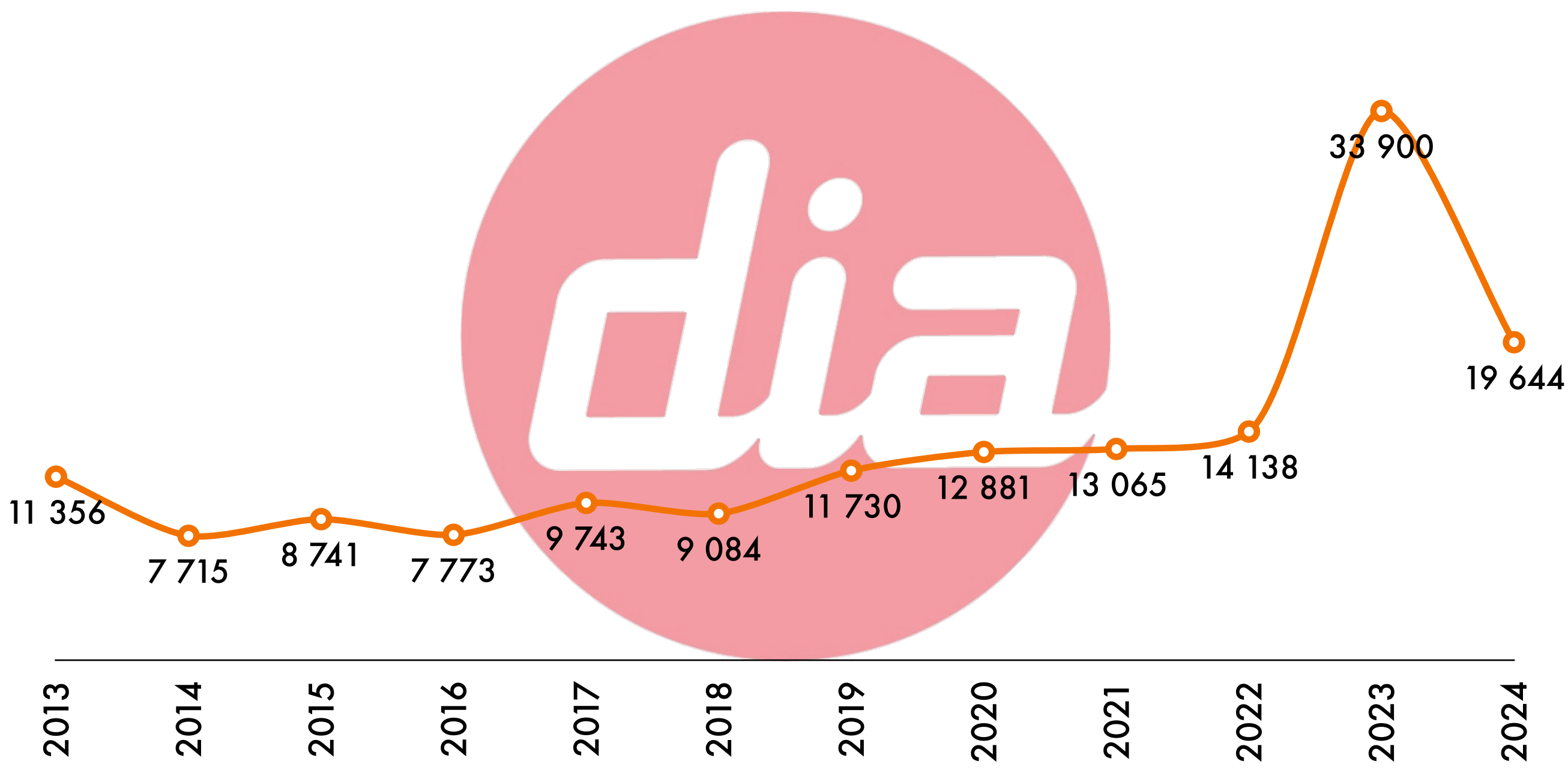


Основные поставщики 2024 год

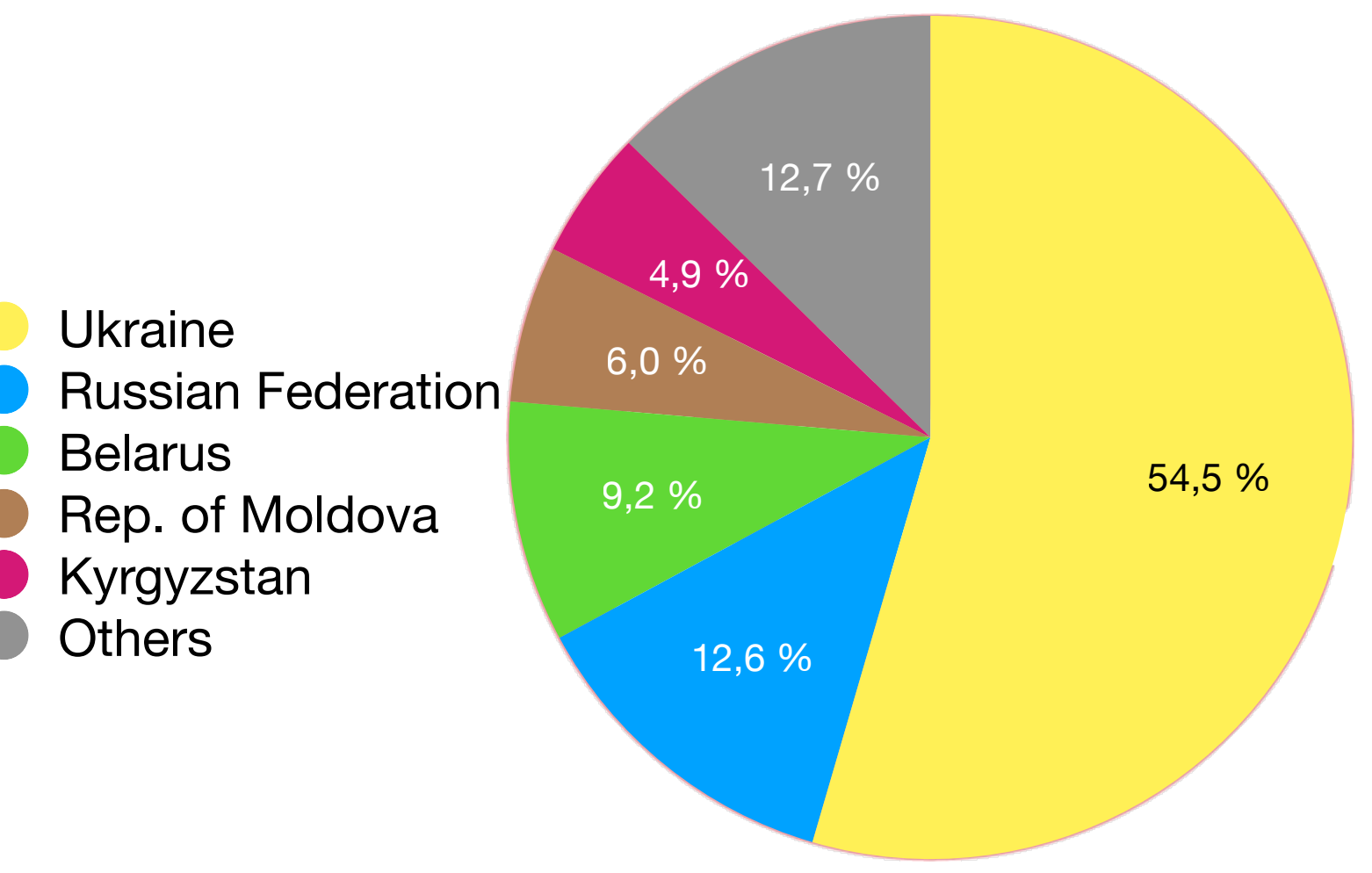


 Cheese Imp. 2024

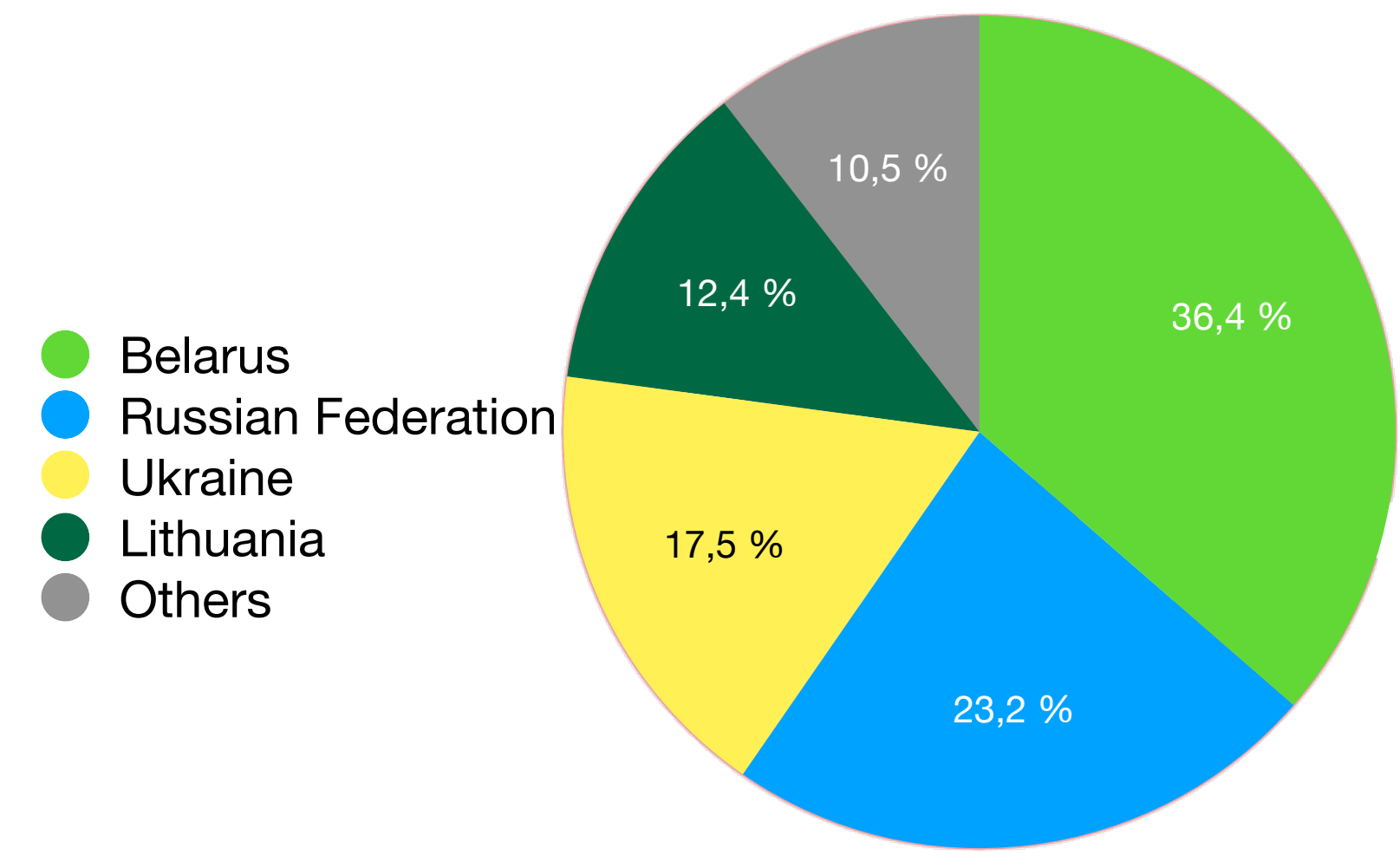
 Россия  Украина  Беларусь  Kyrgyzstan



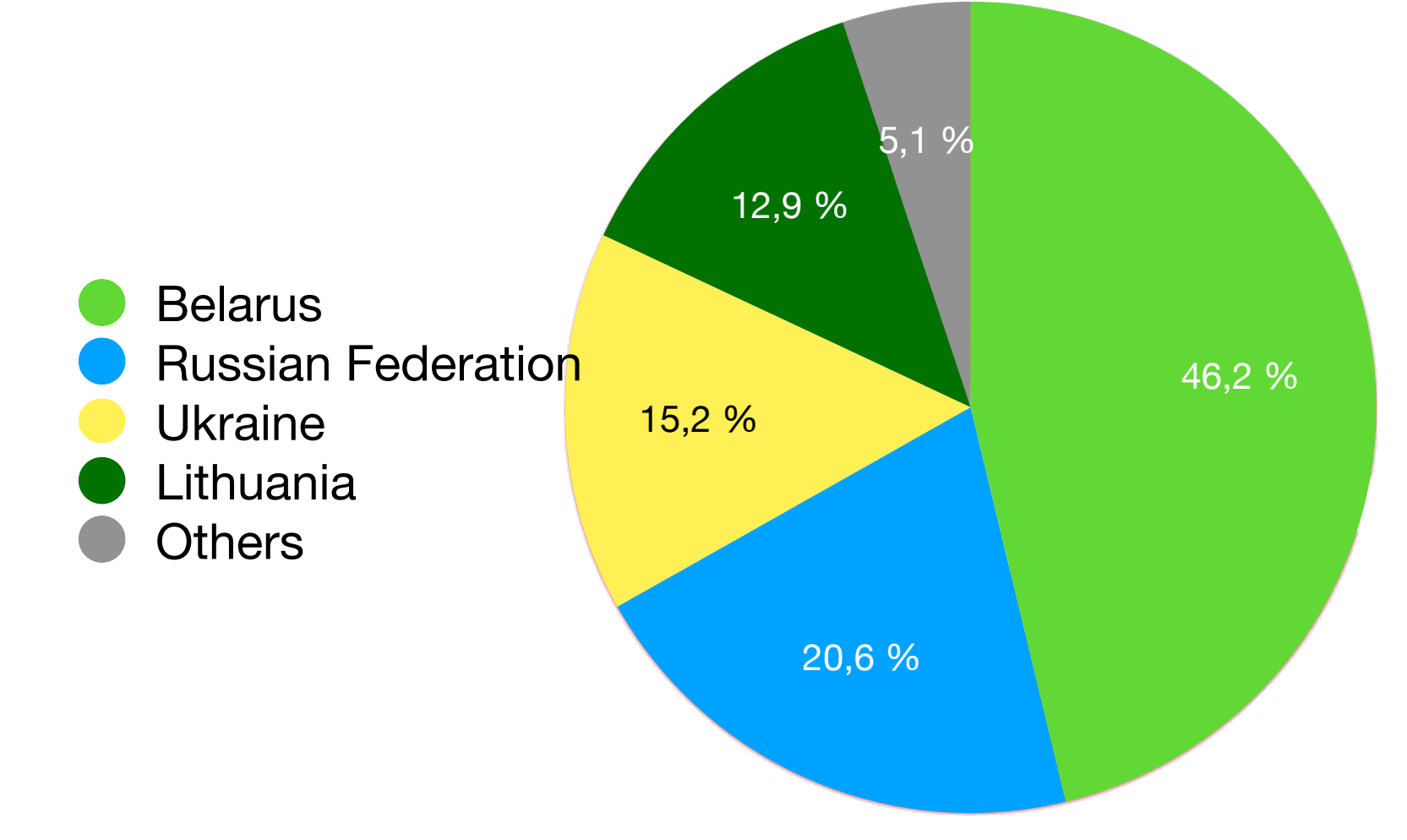
Основные поставщики 2013 год

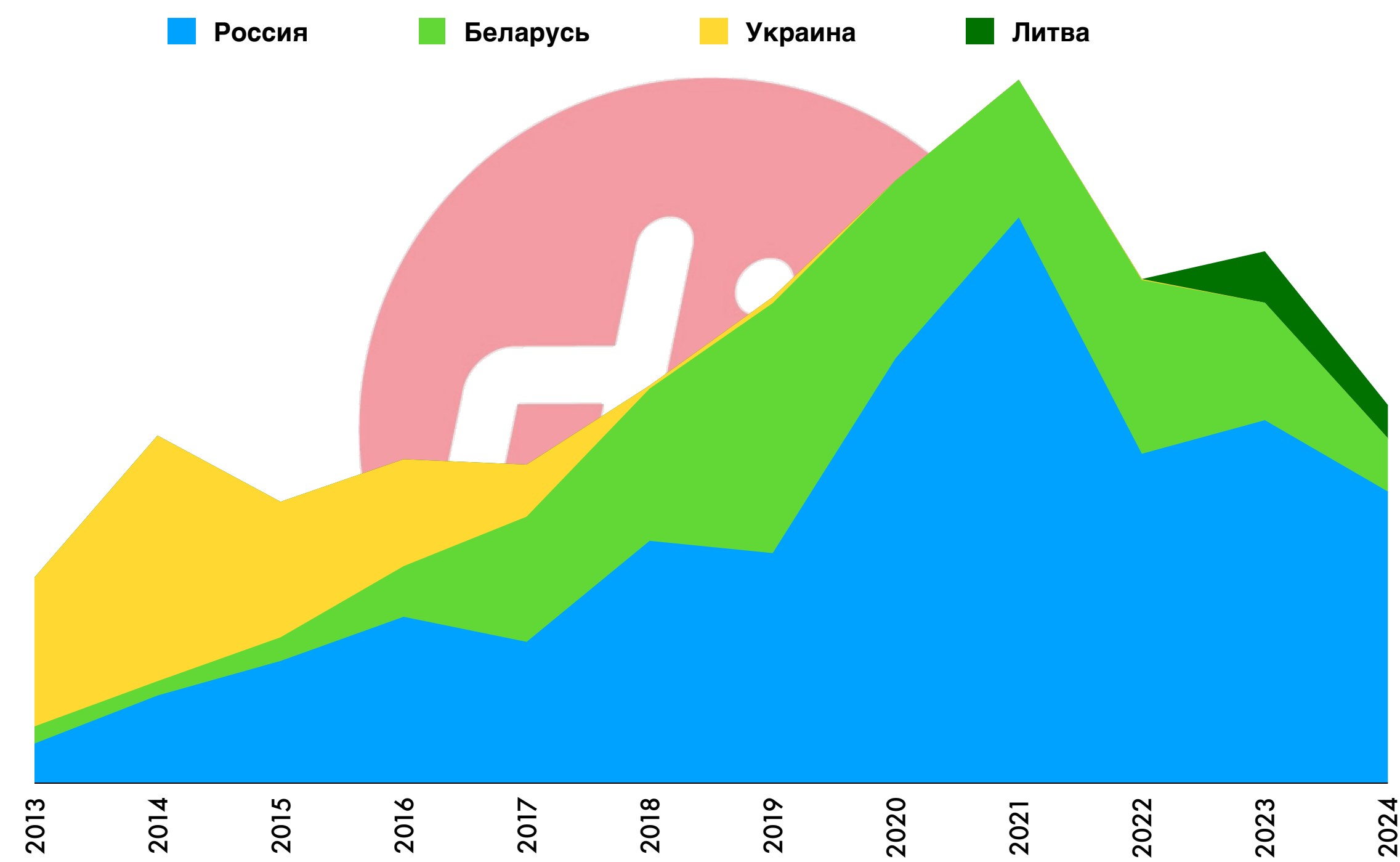
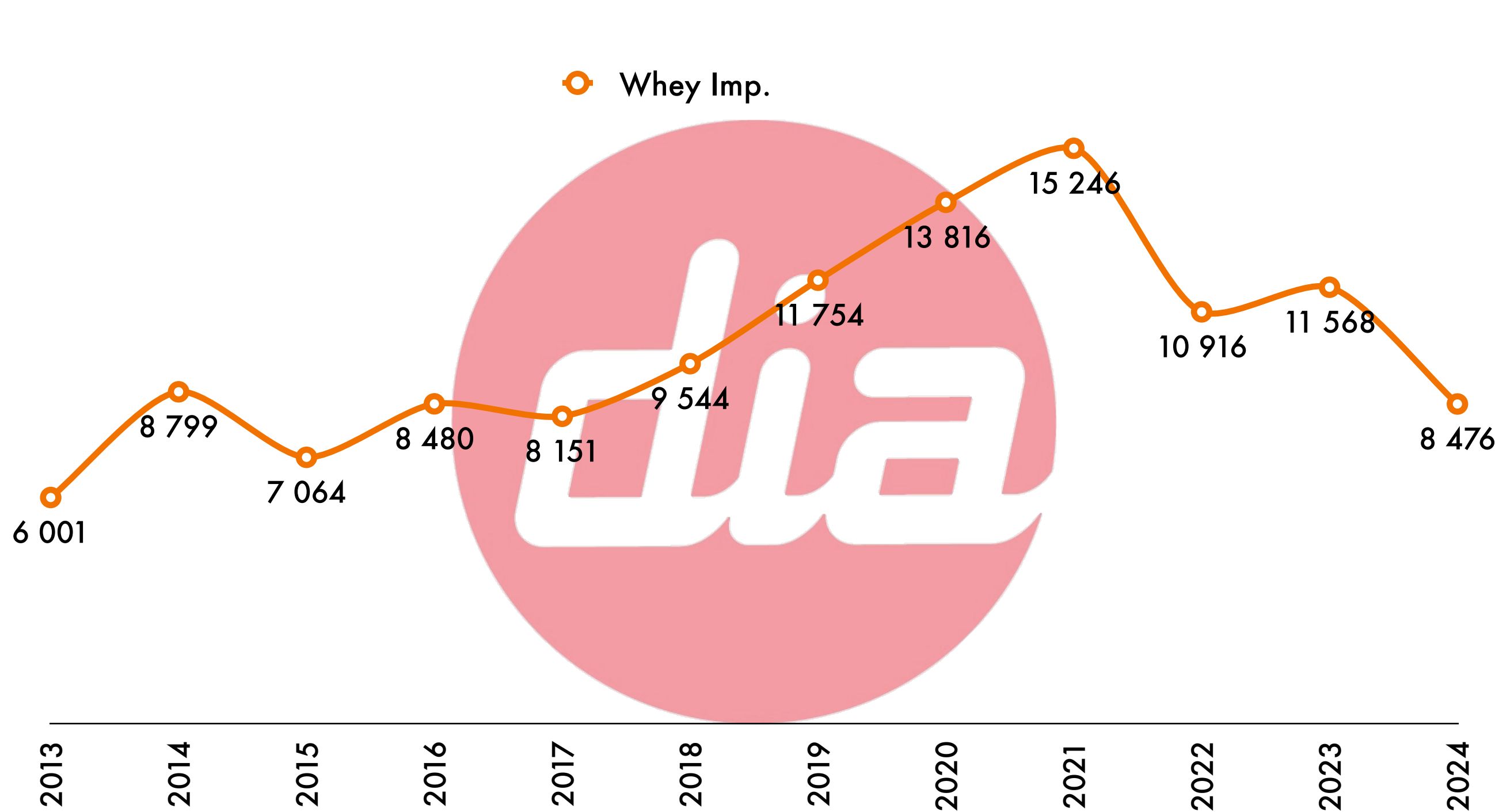


Основные поставщики 2022 год

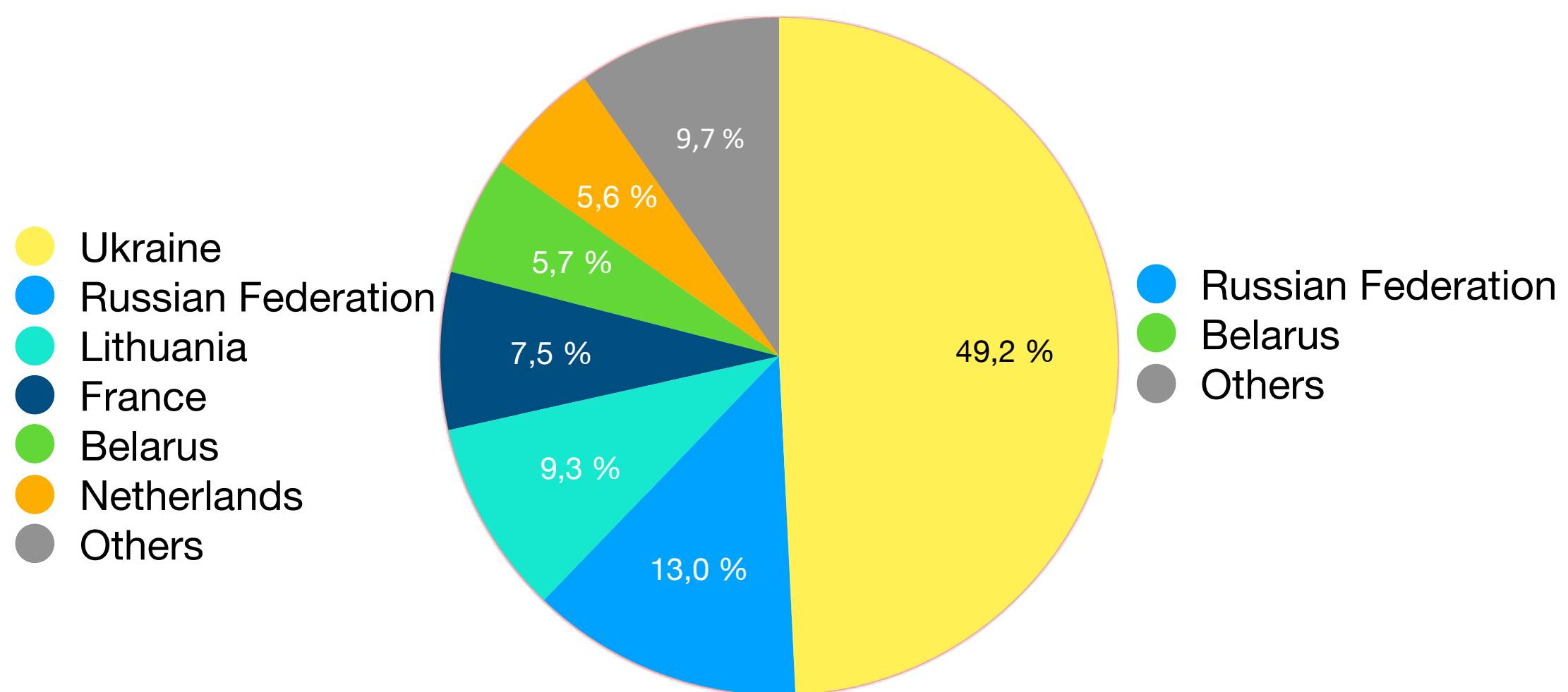


Основные поставщики 2024 год

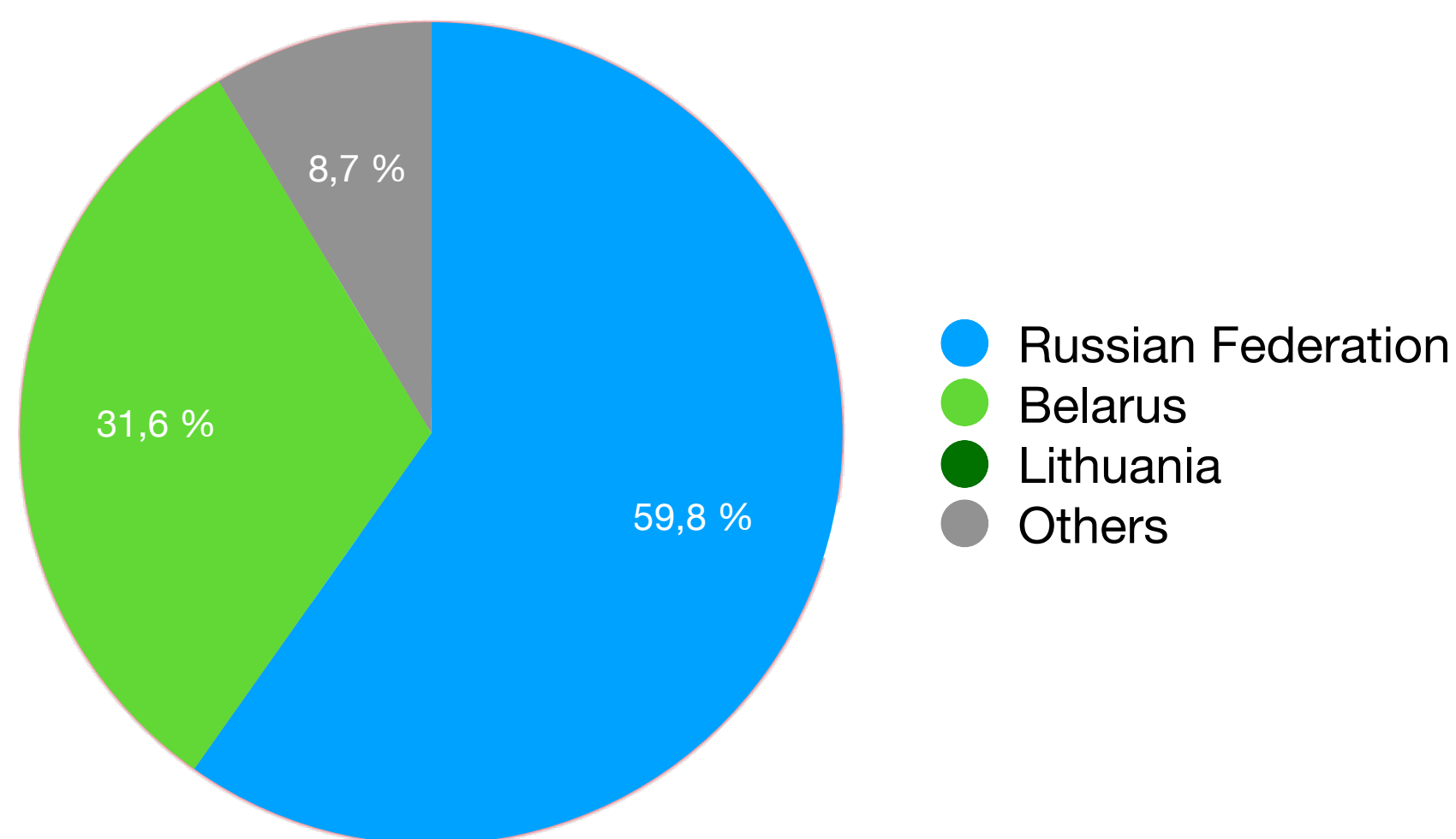




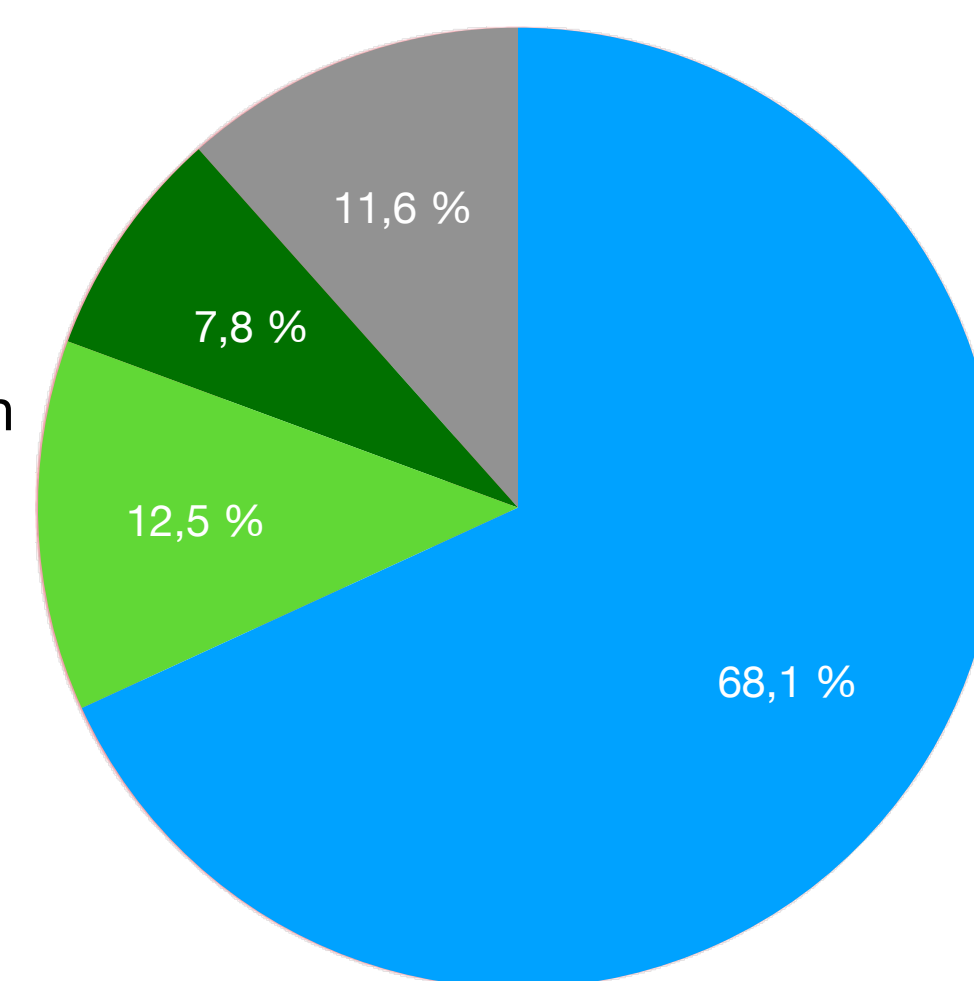
Основные поставщики 2013 год

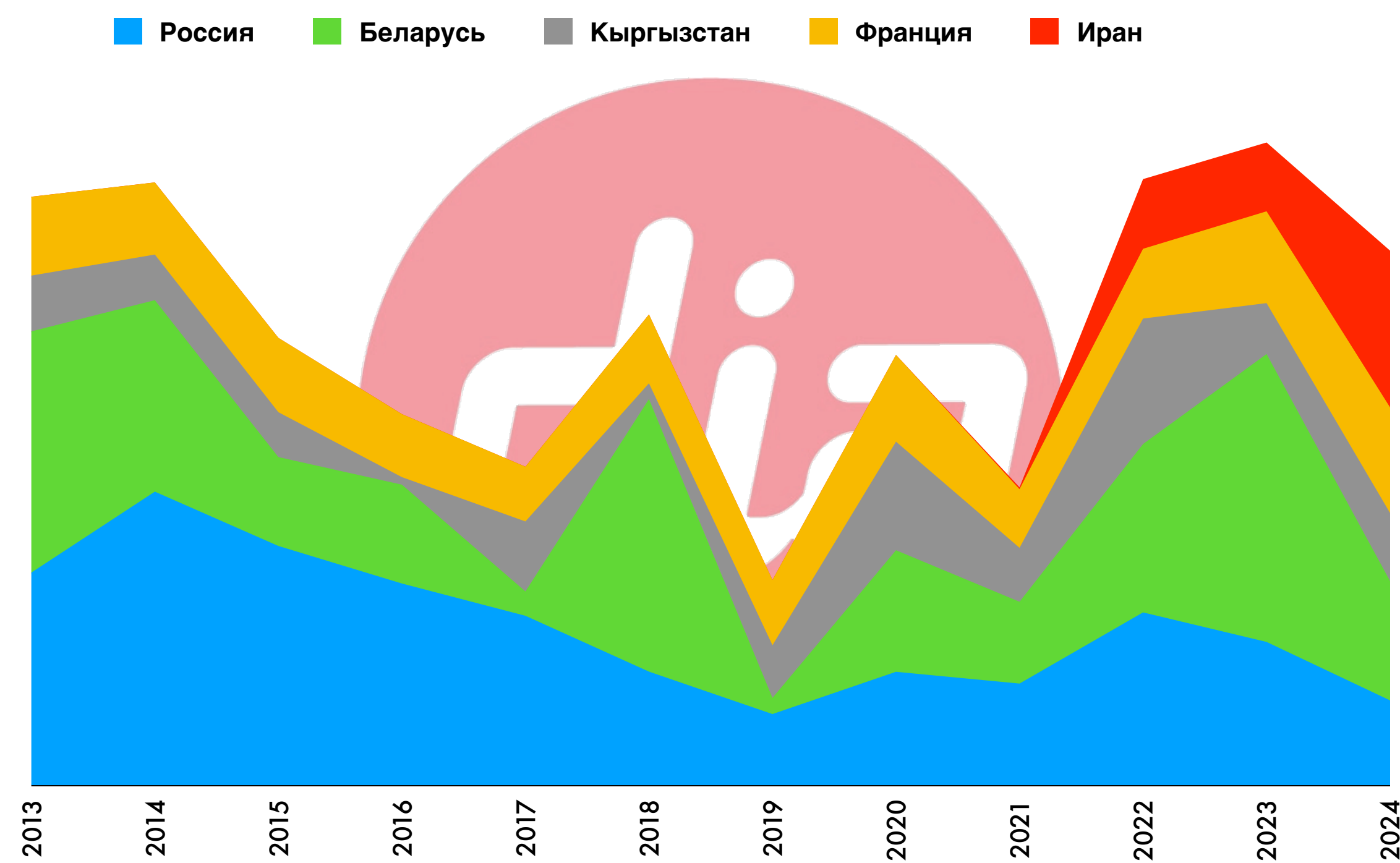
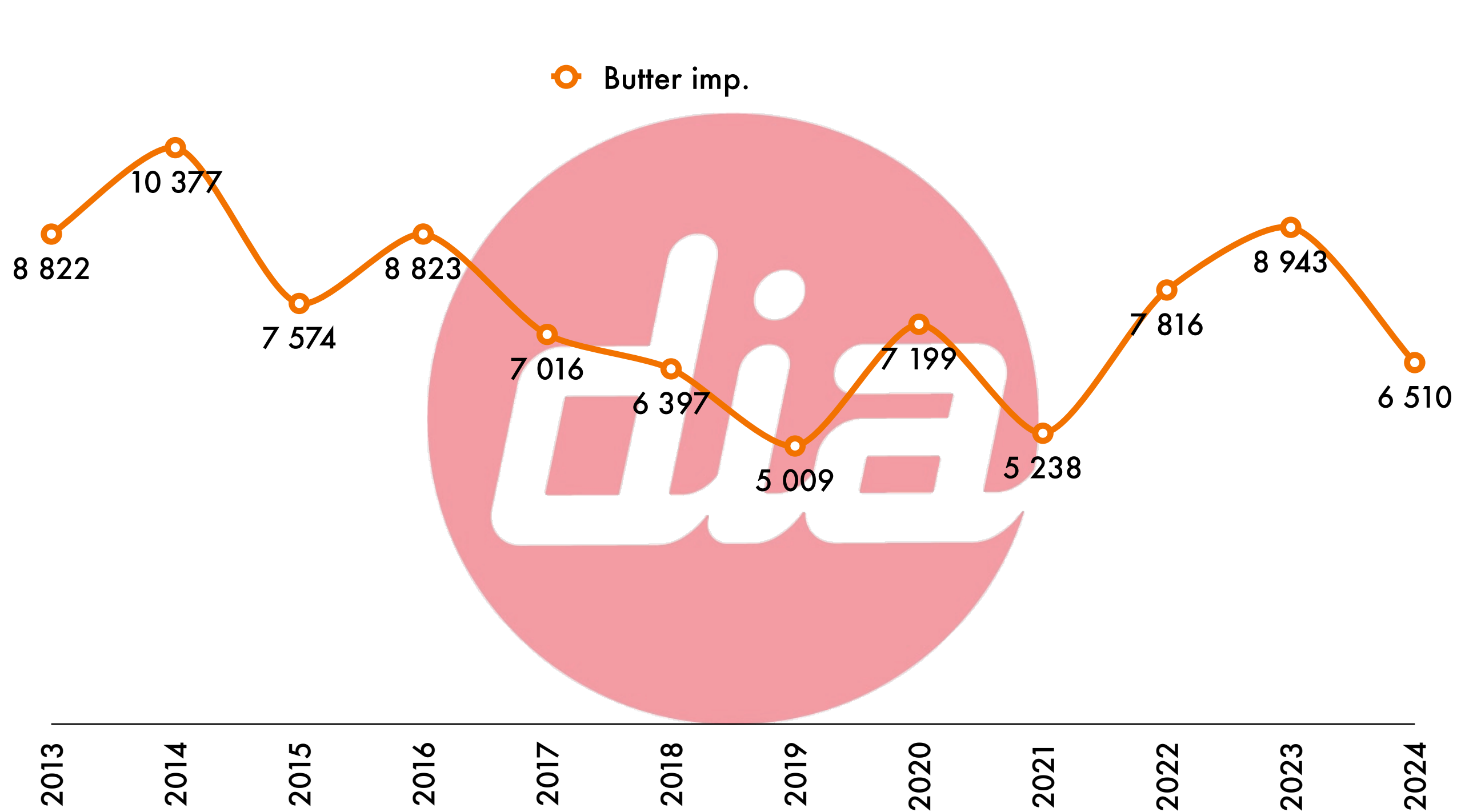


Основные поставщики 2022 год

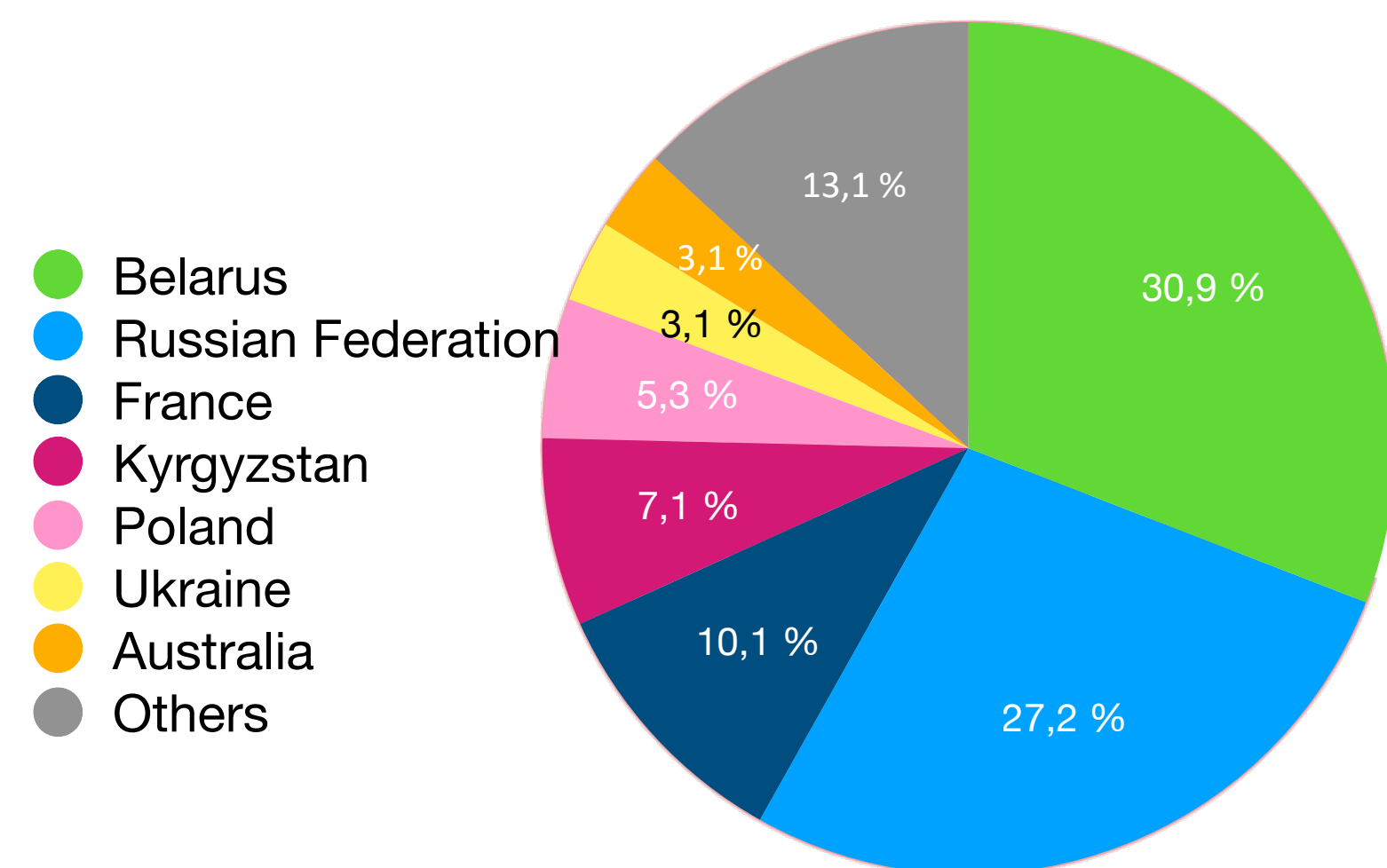


Основные поставщики 2024 год

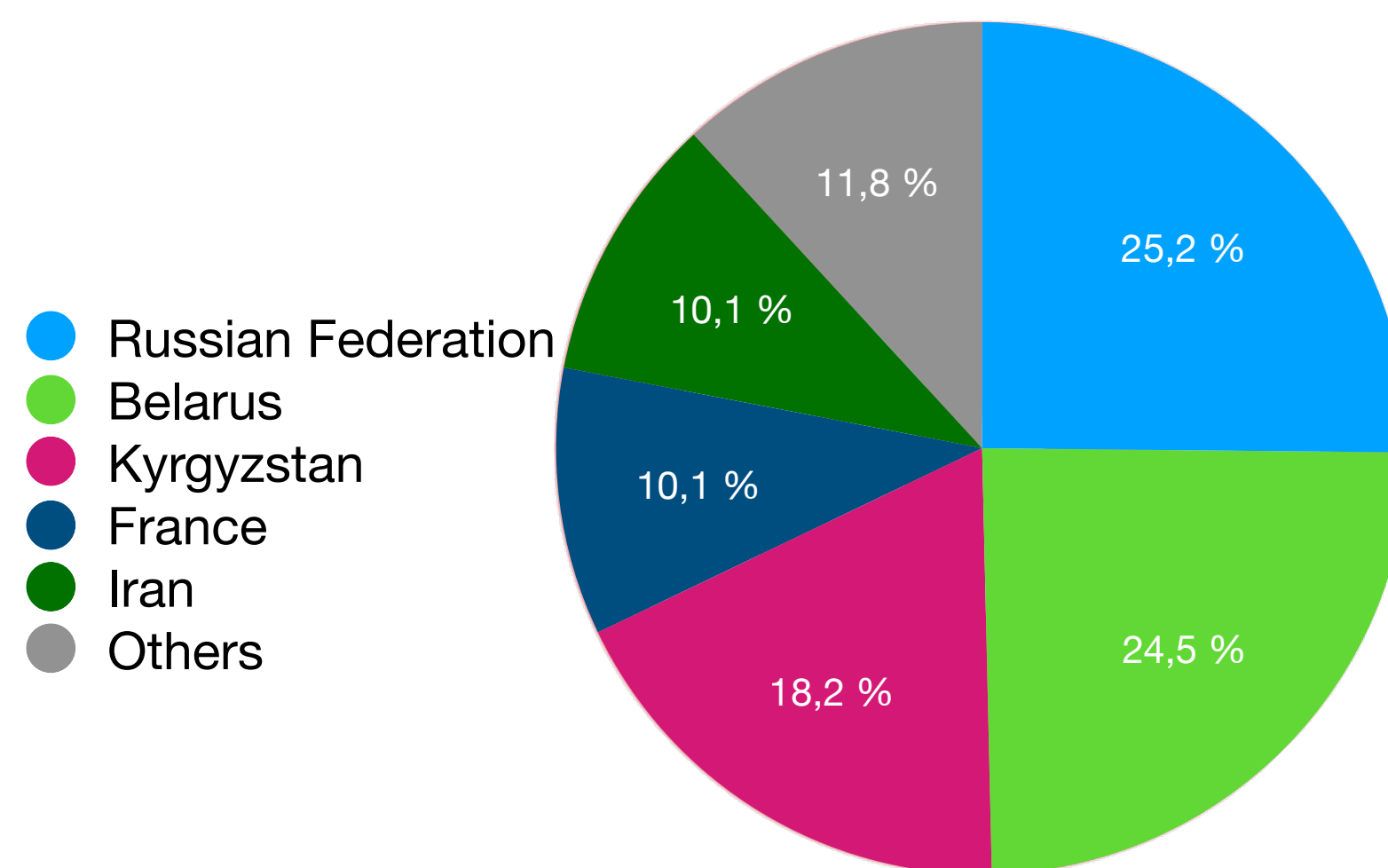




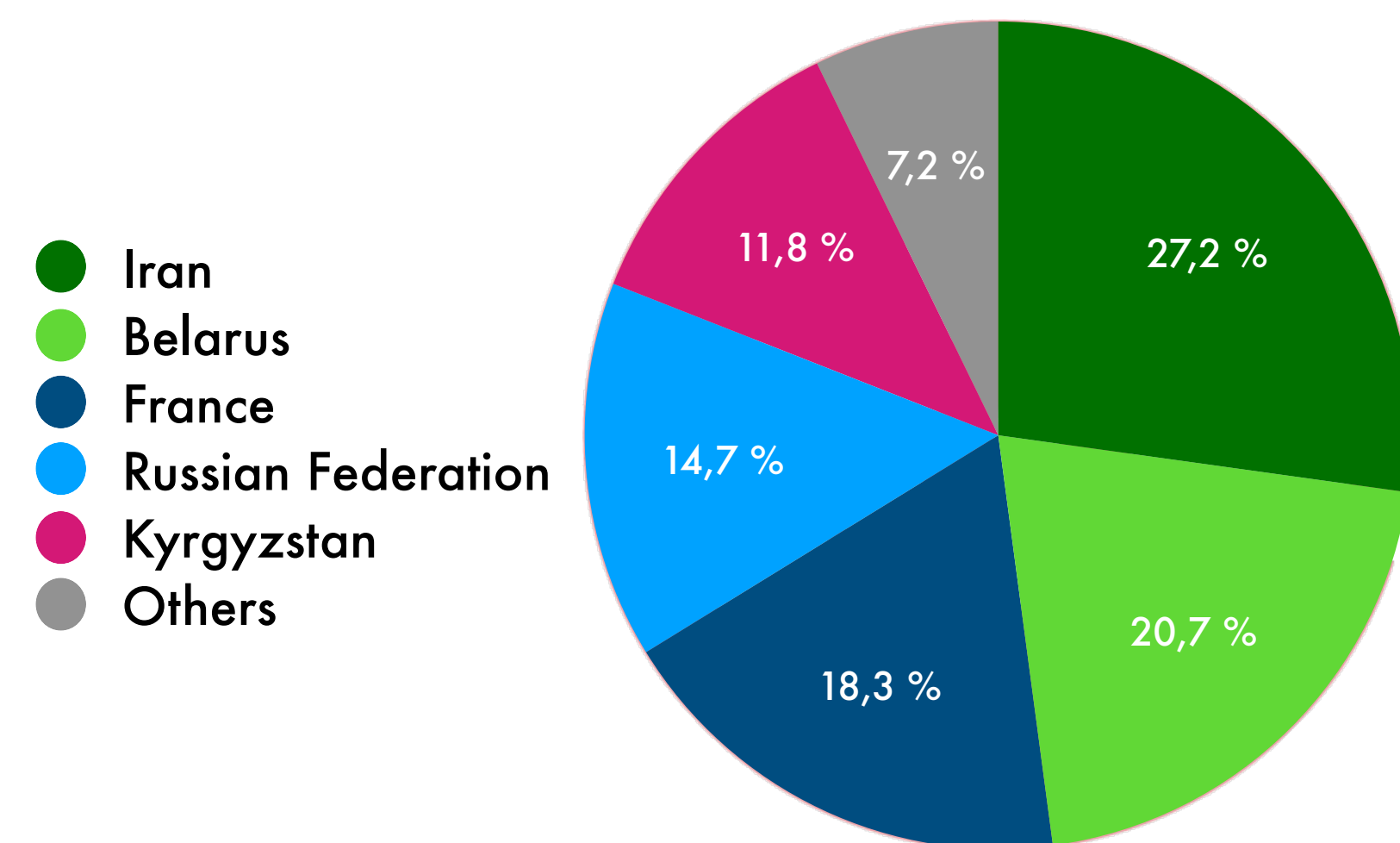
Основные поставщики 2013 год



Основные поставщики 2022 год



Основные поставщики 2024 год

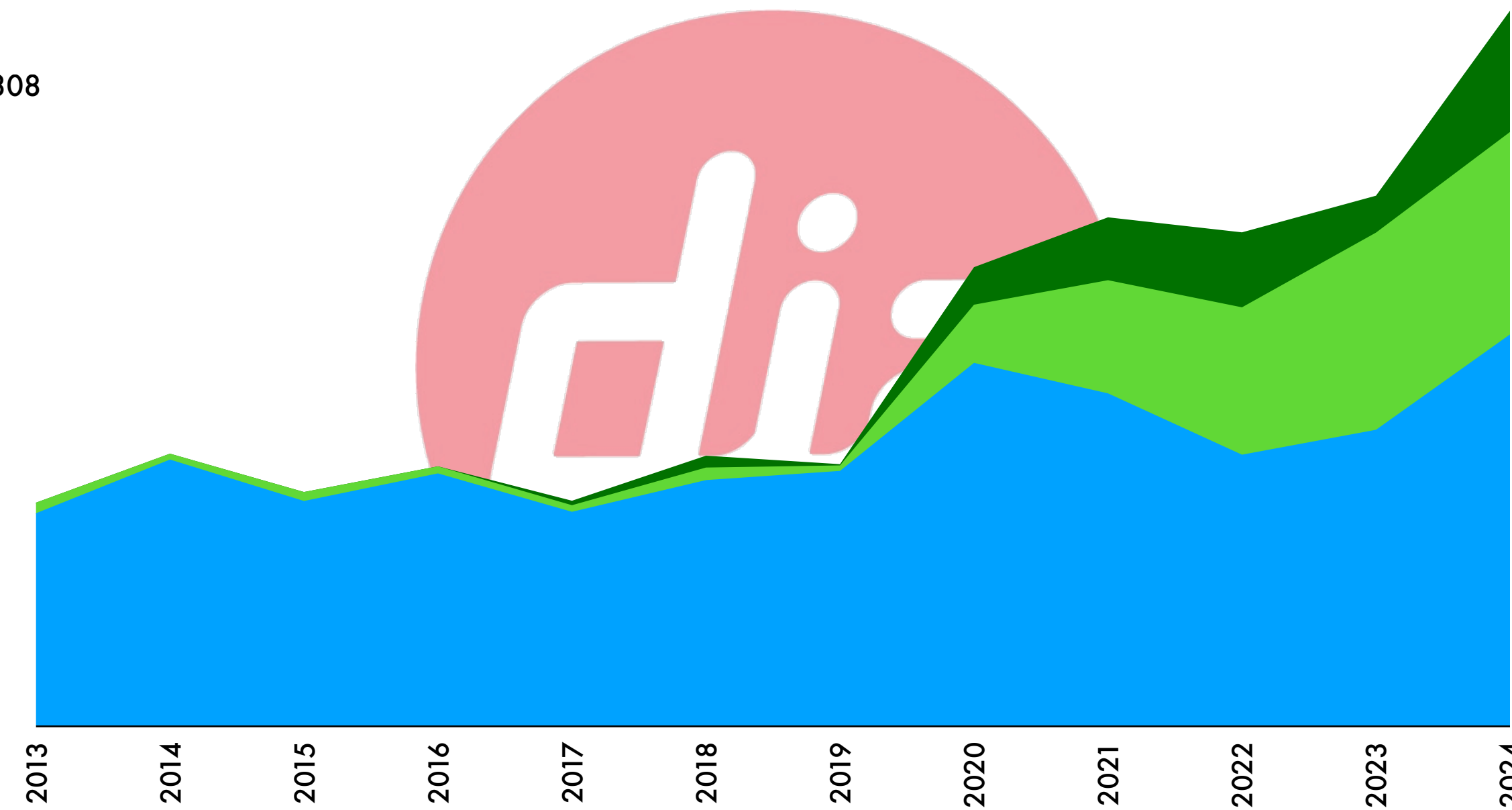
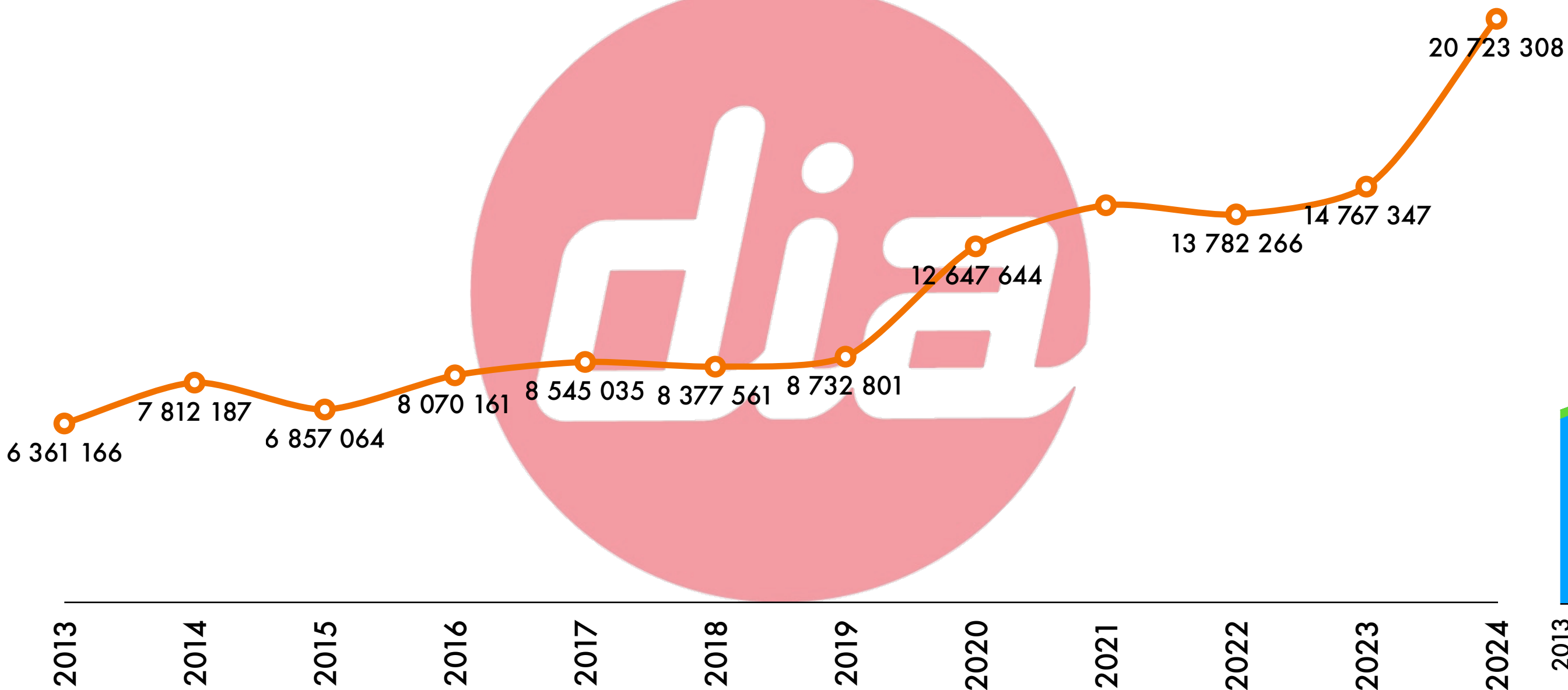


Fresh cheese Imp. 2024

Россия

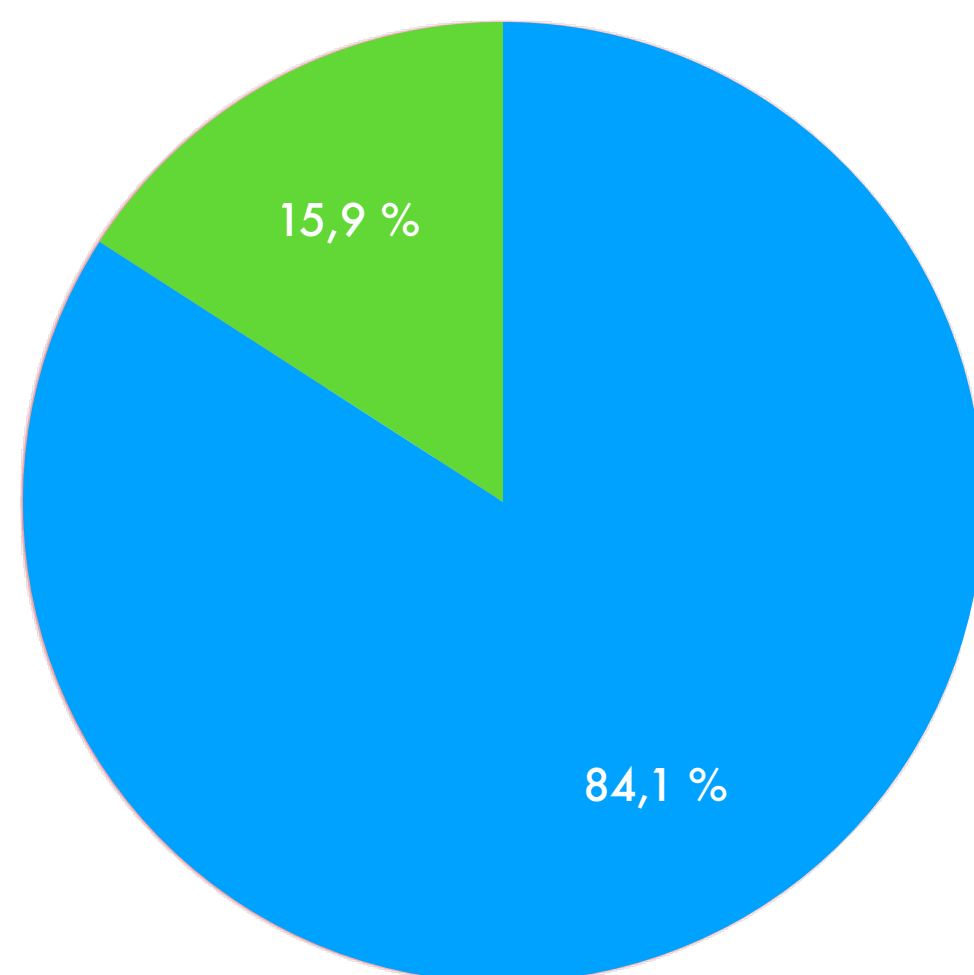
Беларусь

Иран



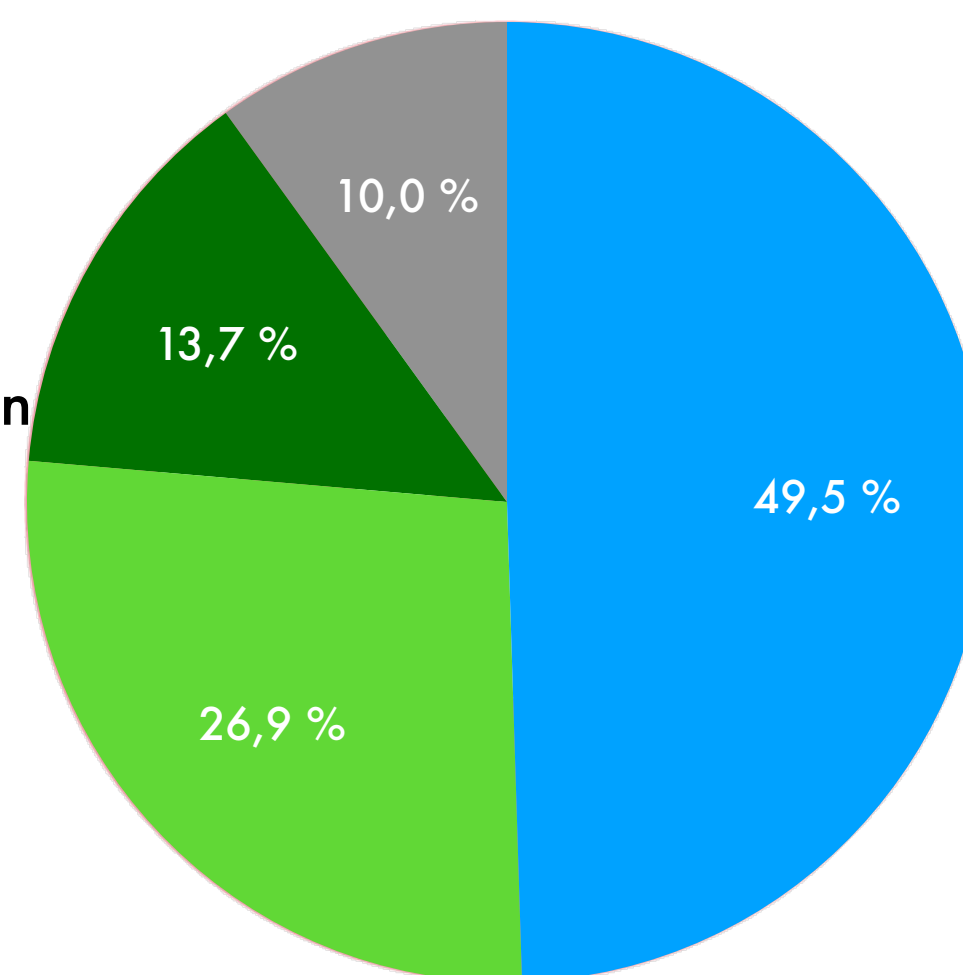
Основные поставщики 2013 год

Russian Federation
Others



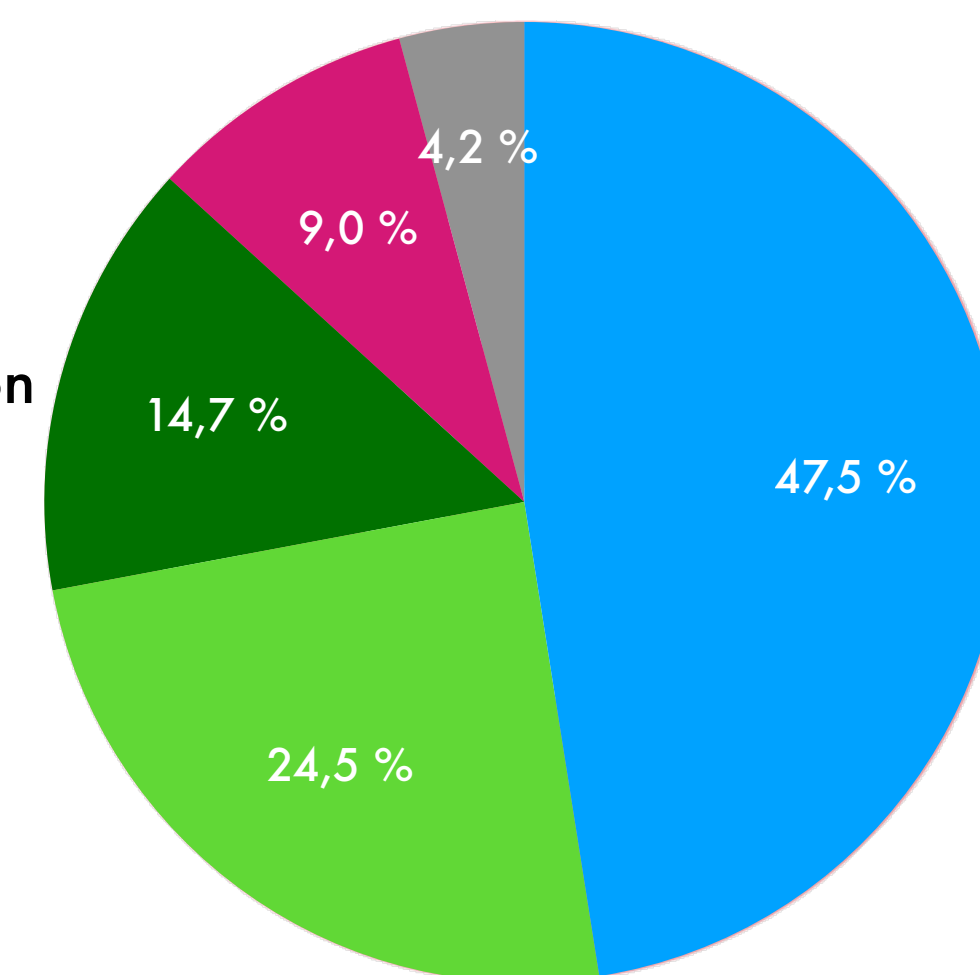
Основные поставщики 2022 год

Russian Federation
Belarus
Iran
Others



Основные поставщики 2024 год

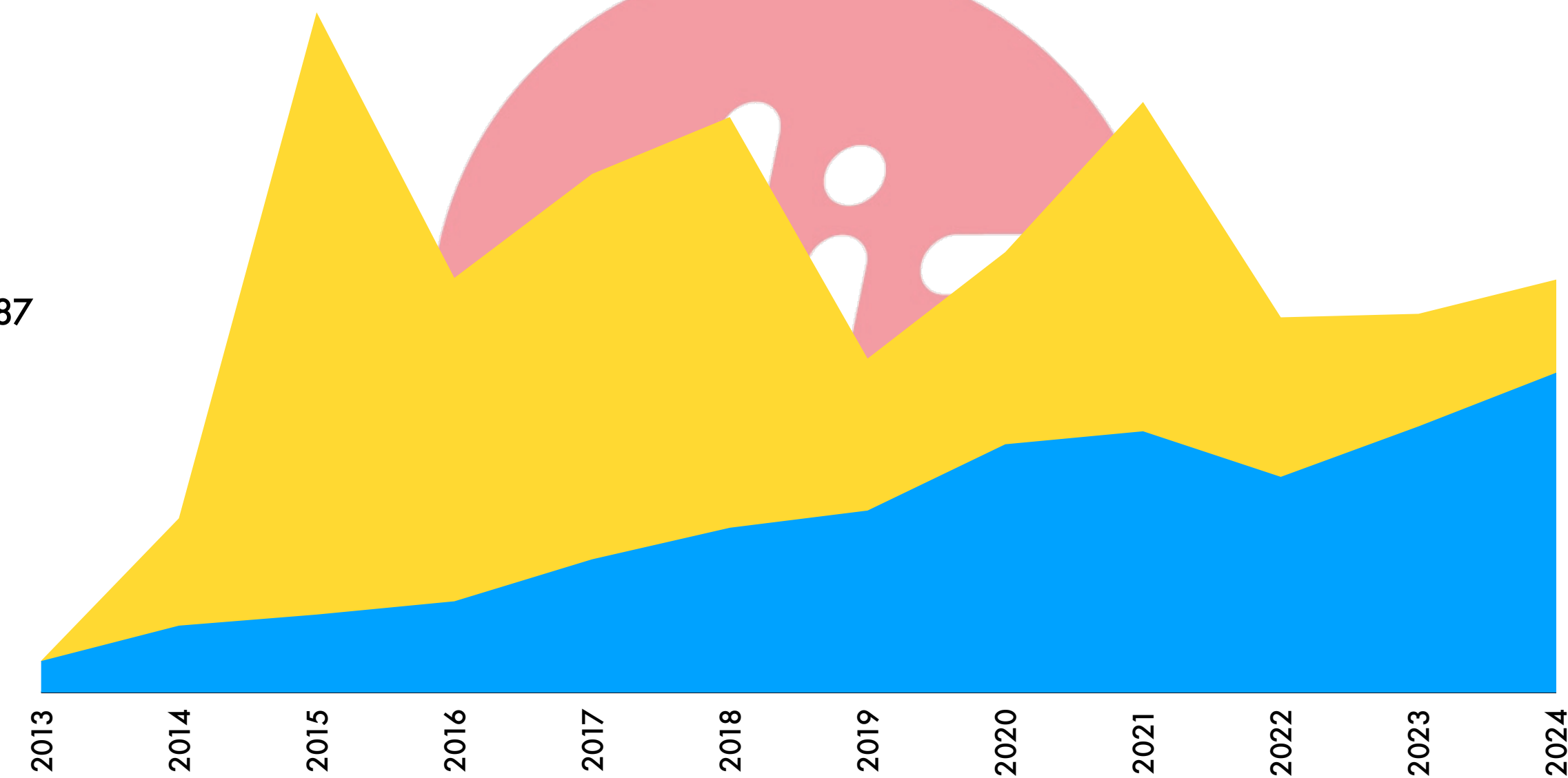
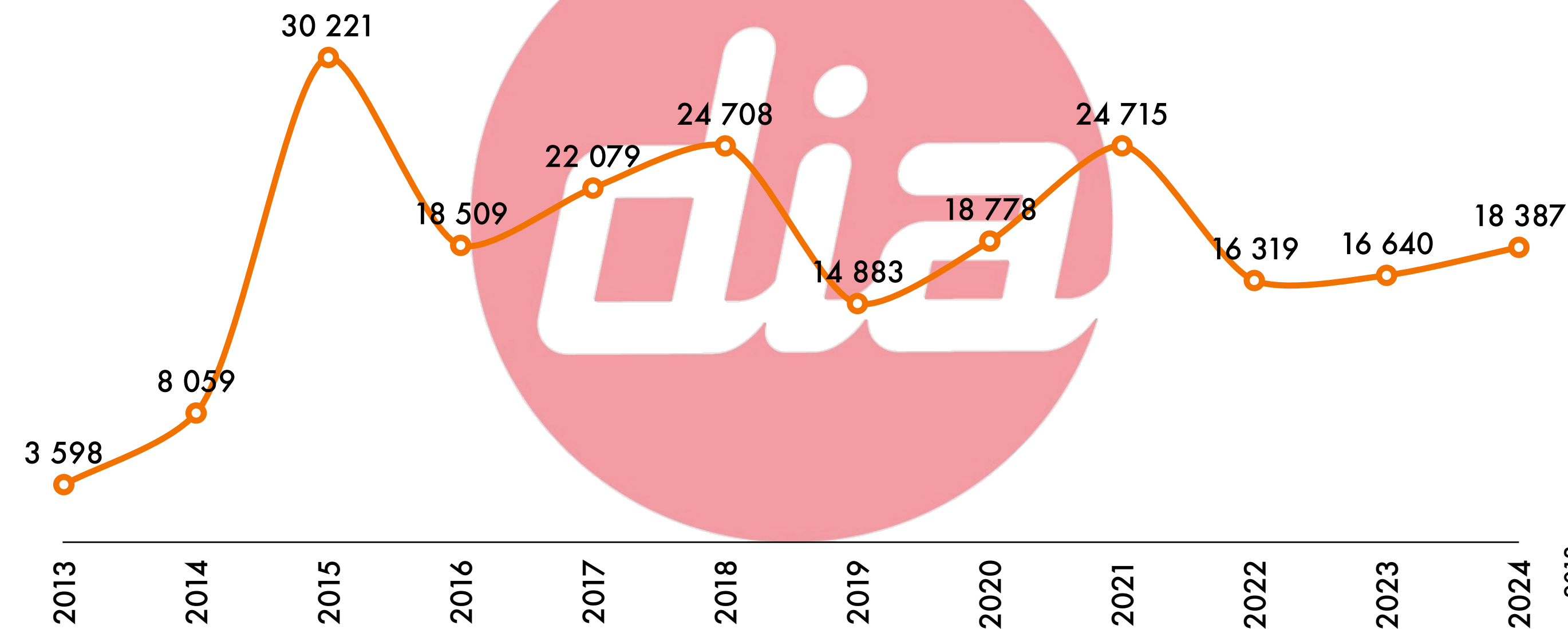
Russian Federation
Belarus
Iran
Kyrgyzstan
Others



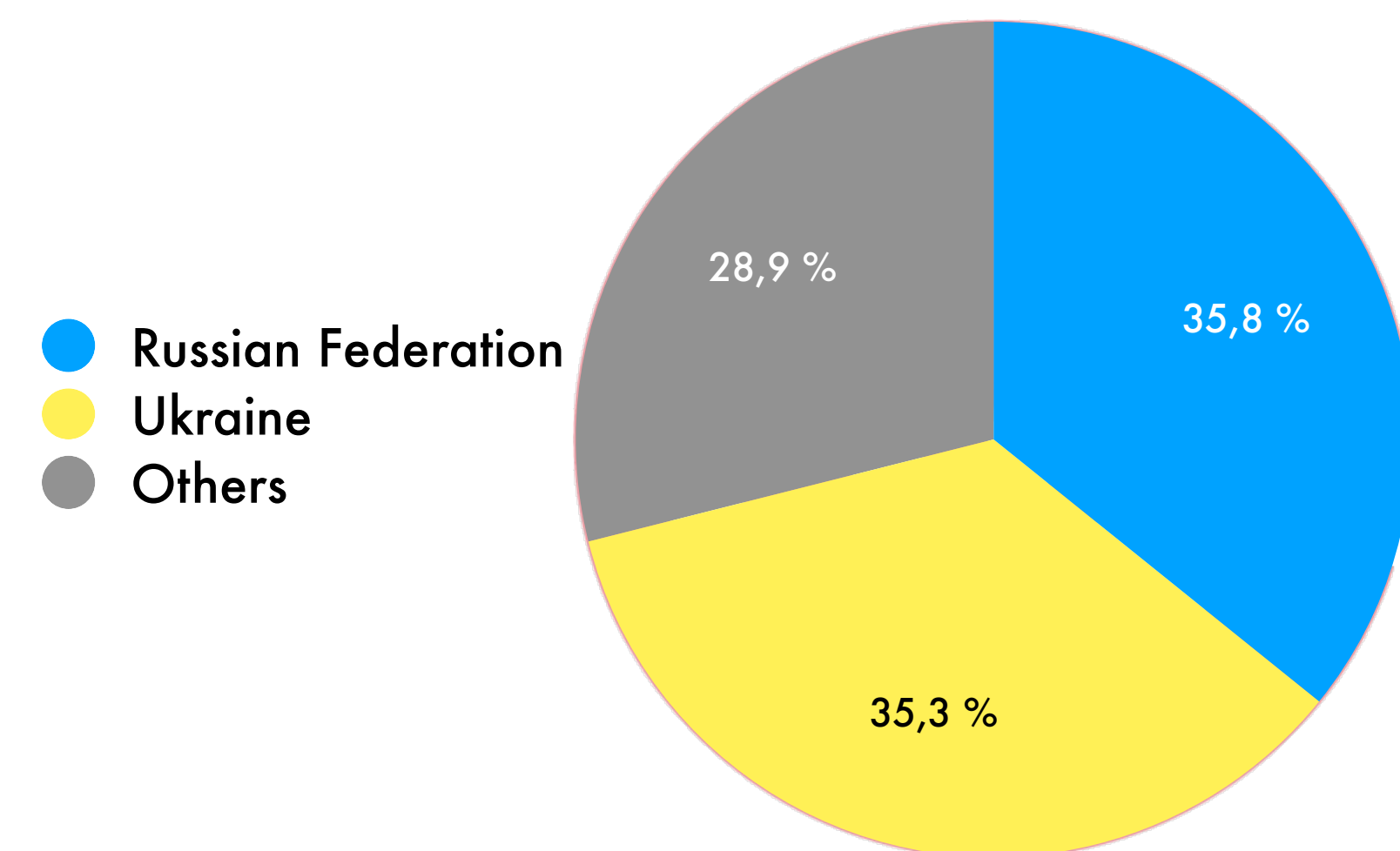
○ Analog cheese Imp.

■ Россия

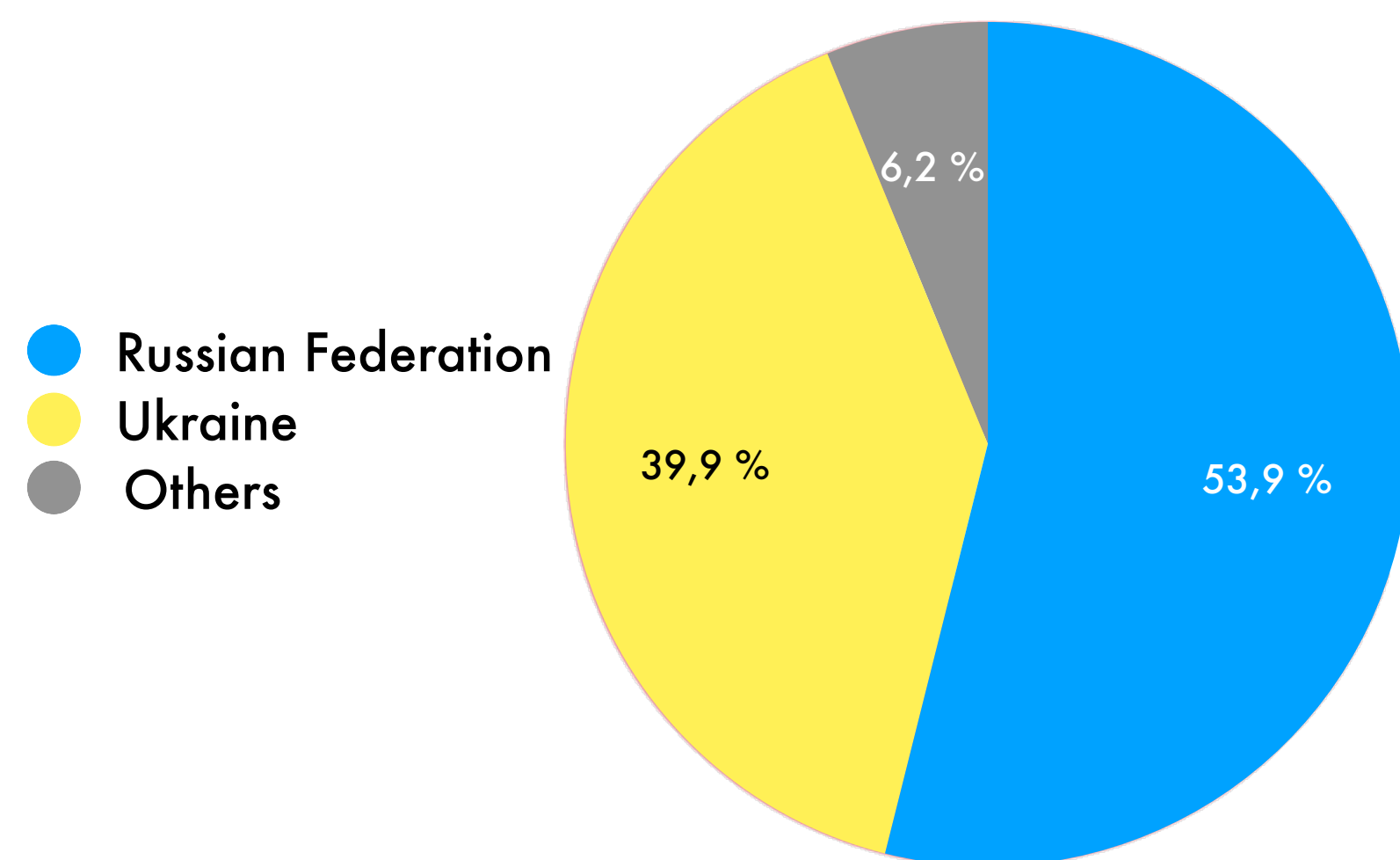
■ Украина



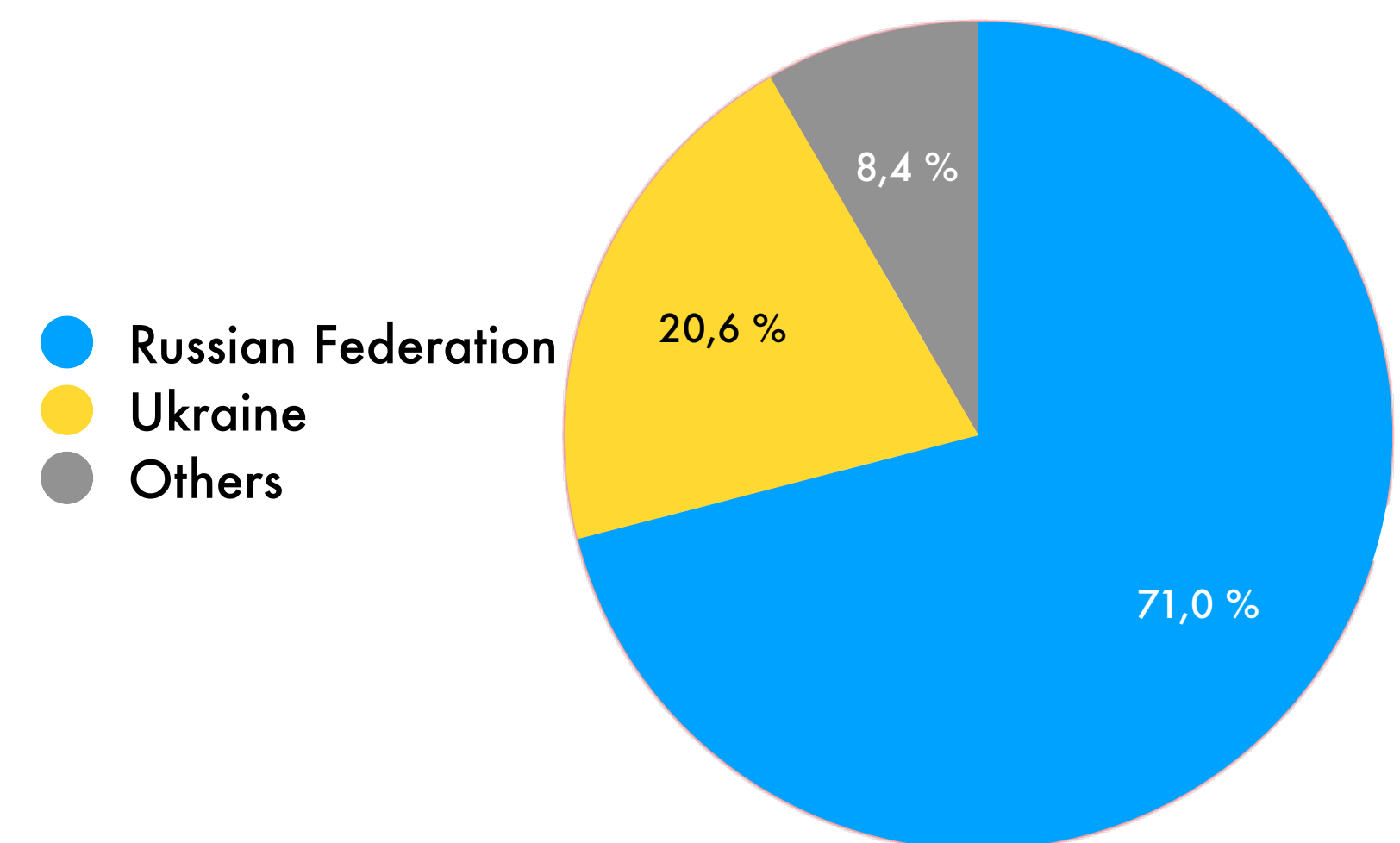
Основные поставщики 2013 год



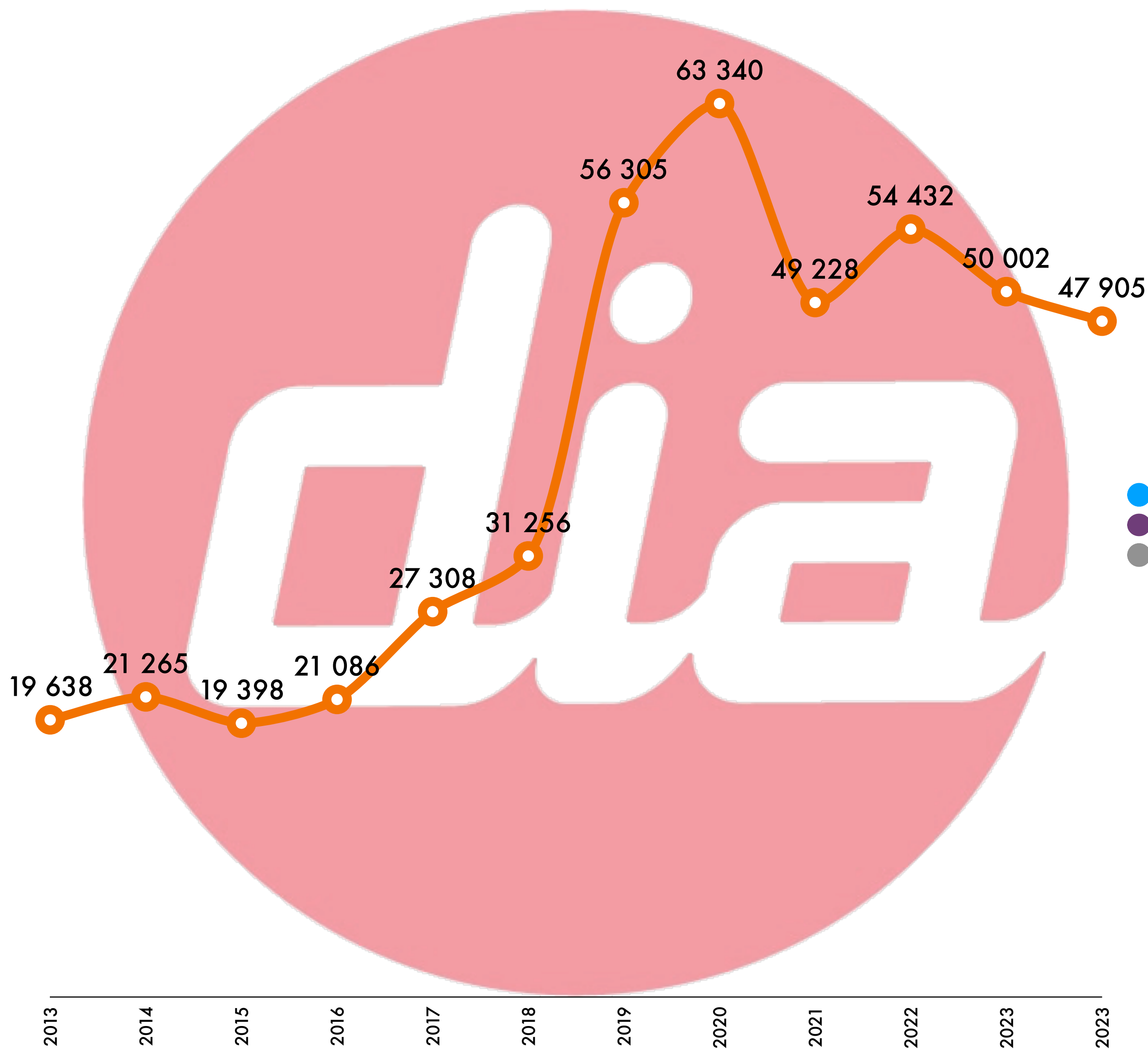
Основные поставщики 2022 год



Основные поставщики 2024 год

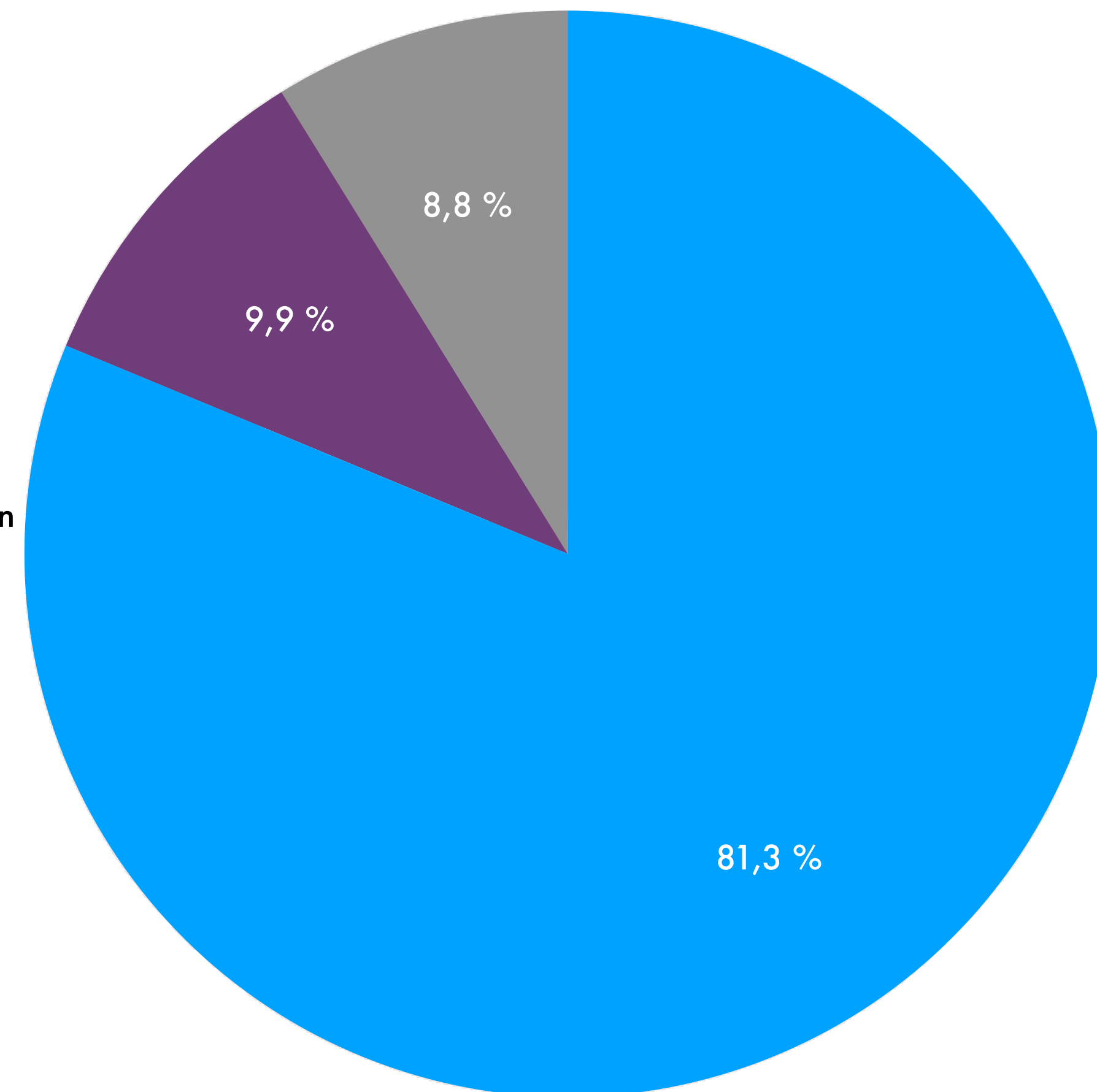


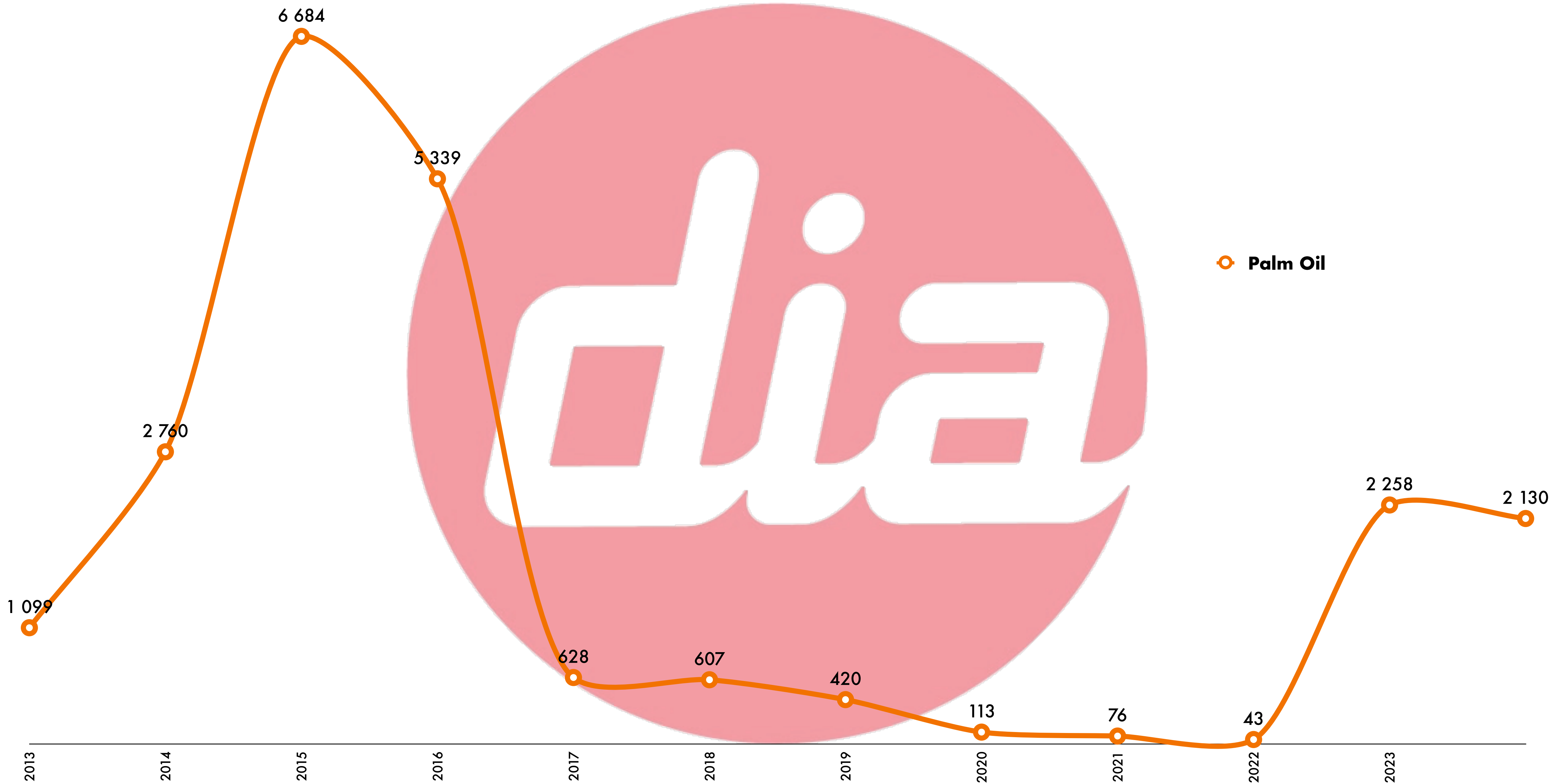
○ MFR Imp



● Russian Federation
● Malaysia
● Others

Основные поставщики 2023 год





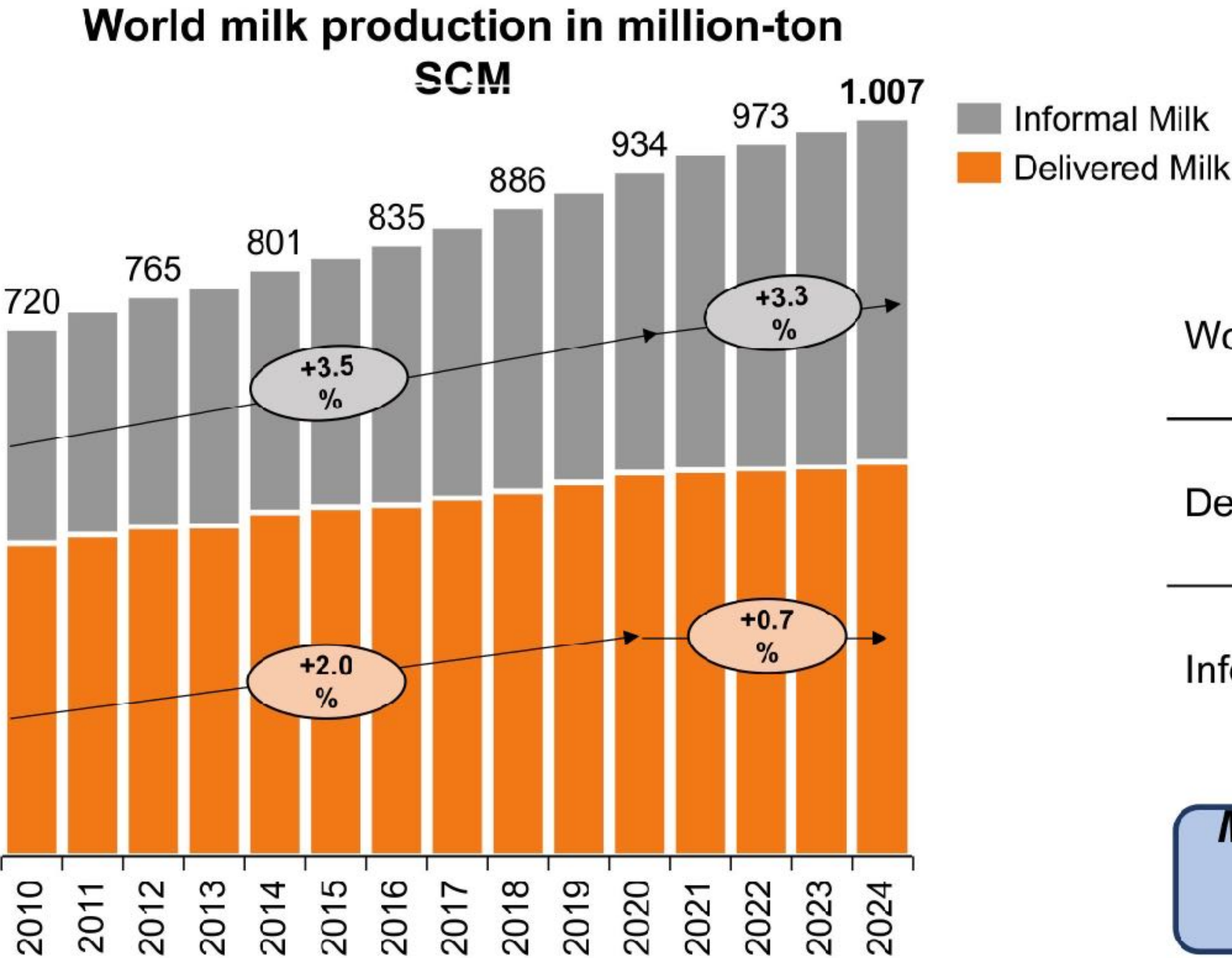
Situation in the Global Dairy Market

Global Dairy Outlook by IFCN



Conference, Kazakhstan, October 2025

Crossing a billion ton of milk, but production growth is slowing



	2010-2020	2020-2024
World Level	Ø 2.6% = + 21 mill t SCM	Ø 1.9% = + 10 mill t SCM
Delivered Milk	Ø 2.0% = + 10 mill t SCM	Ø 0.7% = + 6 mill t SCM
Informal Milk	Ø 3.5% = + 12 mill t SCM	Ø 3.3% = + 14 mill t SCM

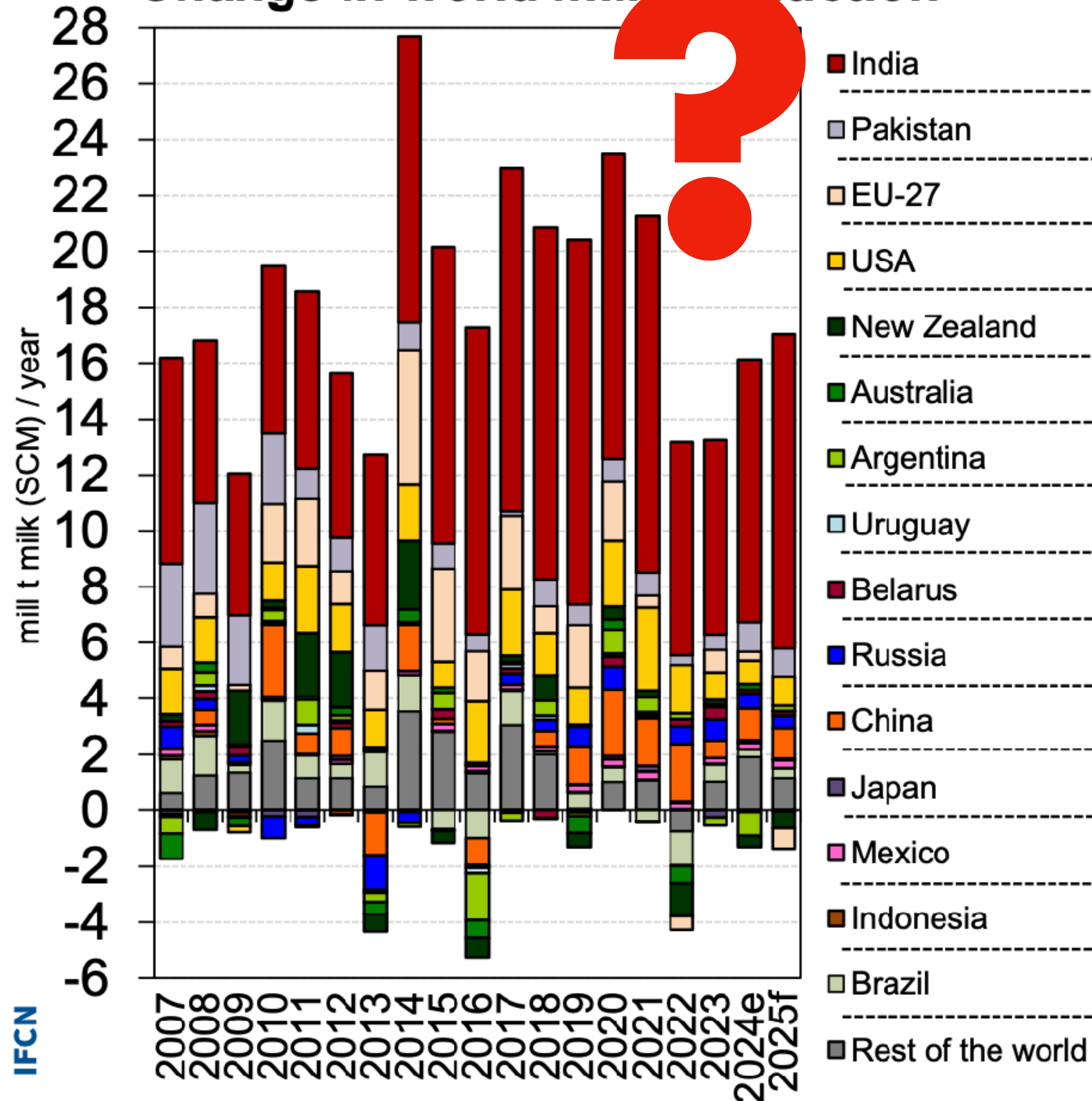
Milk production growth is slowing down, and the share of delivered milk is shrinking

Arrows represent CAGR for the selected time period

Source : IFCN Annual Dairy Sector Data

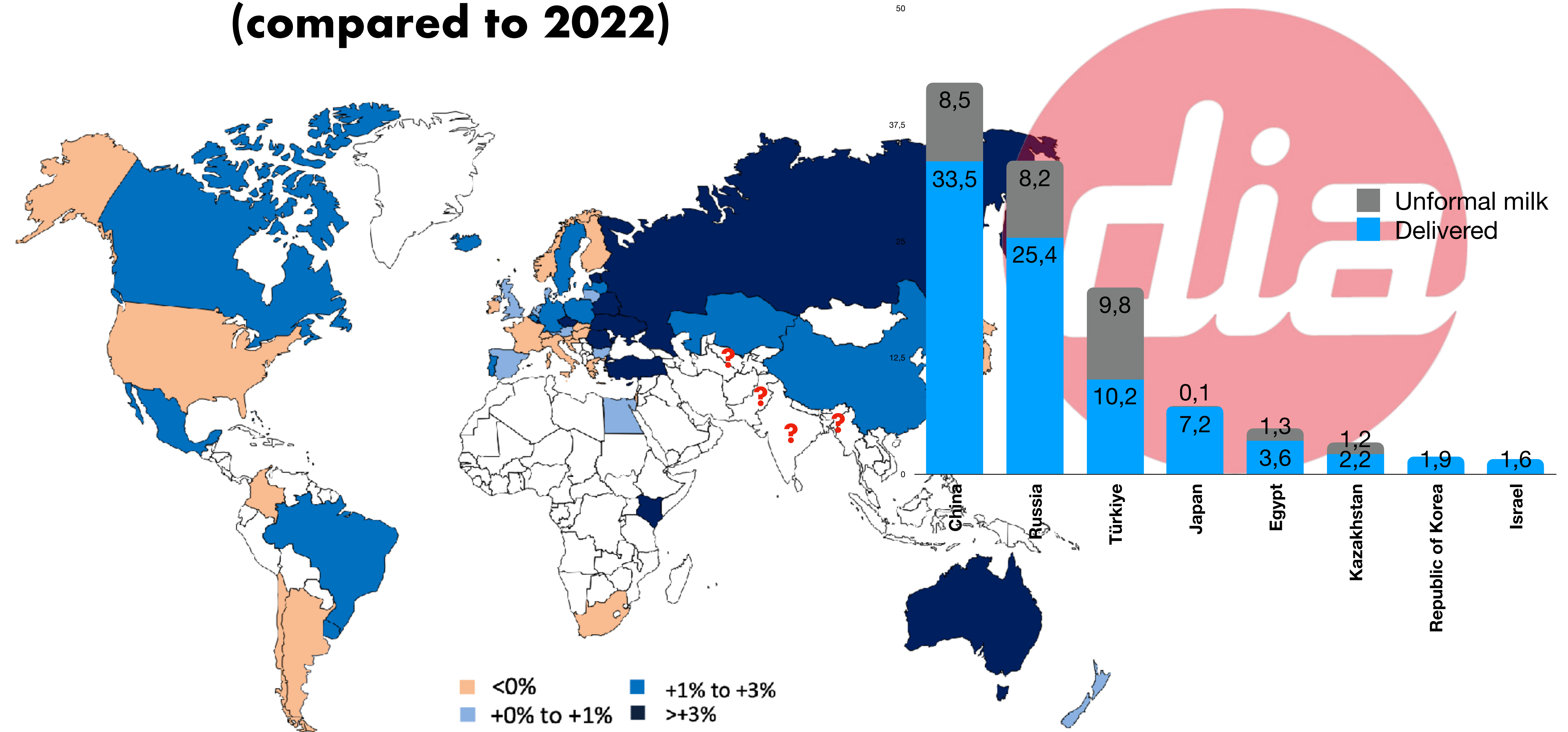
SCM = Solid Corrected Milk 4% fat & 3.5% protein

Change in world milk production



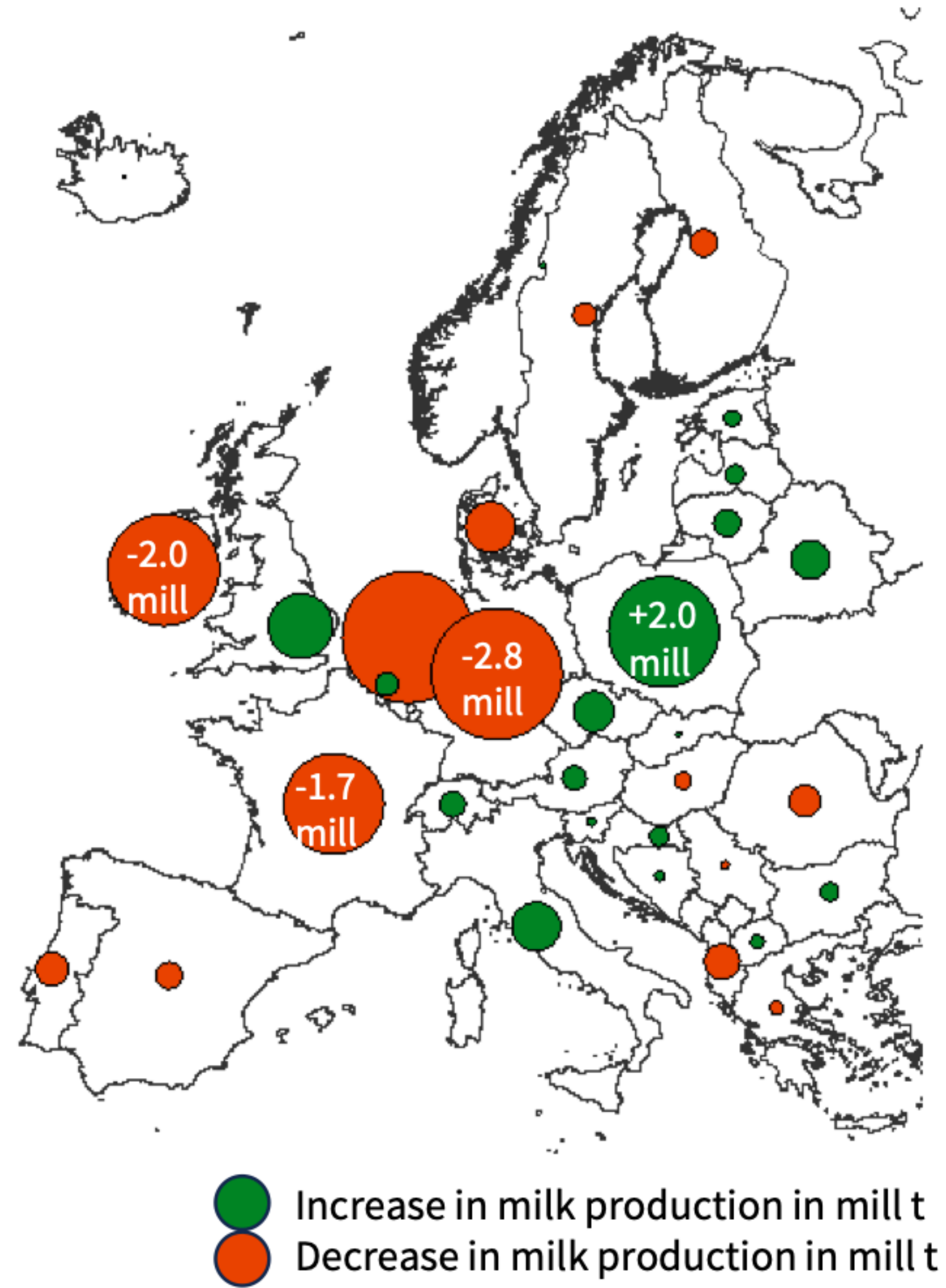
	2016-2021	2022-2023	2024e	2025f
India	5.9%	2.9%	3.5%	4.1%
Pakistan	1.3%	0.8%	2.0%	1.8%
EU-27	1.2%	0.1%	0.2%	-0.5%
USA	2.3%	1.3%	0.8%	1.0%
New Zealand	0.4%	-1.8%	-1.6%	-2.3%
Australia	-1.3%	-3.1%	2.3%	-0.5%
Argentina	0.0%	-0.2%	-7.2%	1.8%
Uruguay	1.9%	0.7%	-3.3%	0.7%
Belarus	1.3%	4.8%	1.7%	1.8%
Russia	1.3%	2.3%	1.7%	1.4%
China	2.6%	3.7%	3.0%	2.8%
Japan	0.7%	-1.2%	1.1%	0.8%
Mexico	2.0%	1.8%	1.9%	2.3%
Indonesia	3.4%	2.2%	2.4%	2.1%
Brazil	0.8%	-1.2%	1.1%	1.4%
Rest of the world	1.5%	0.1%	1.9%	1.1%

Cow's milk delivery development in 2023 (compared to 2022)



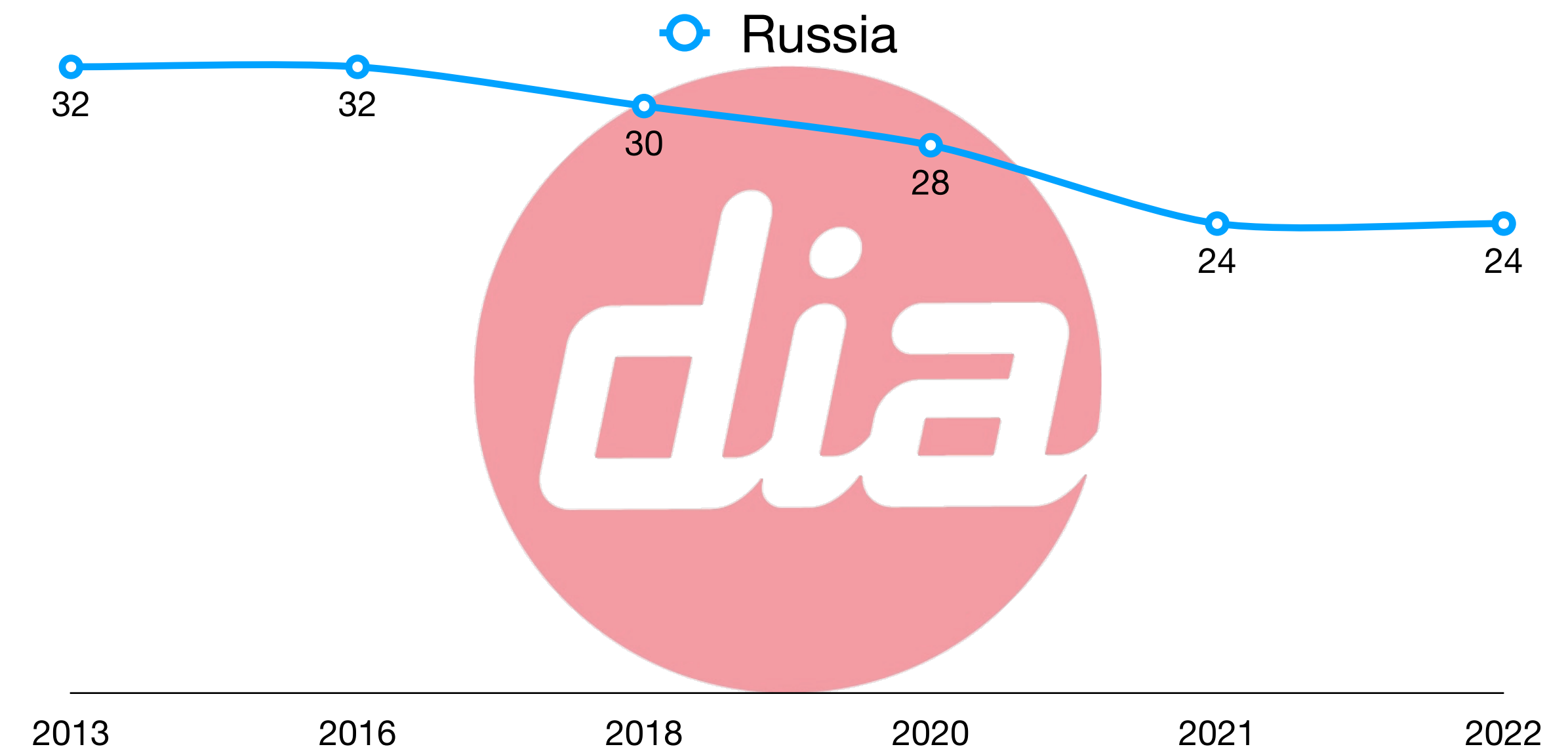
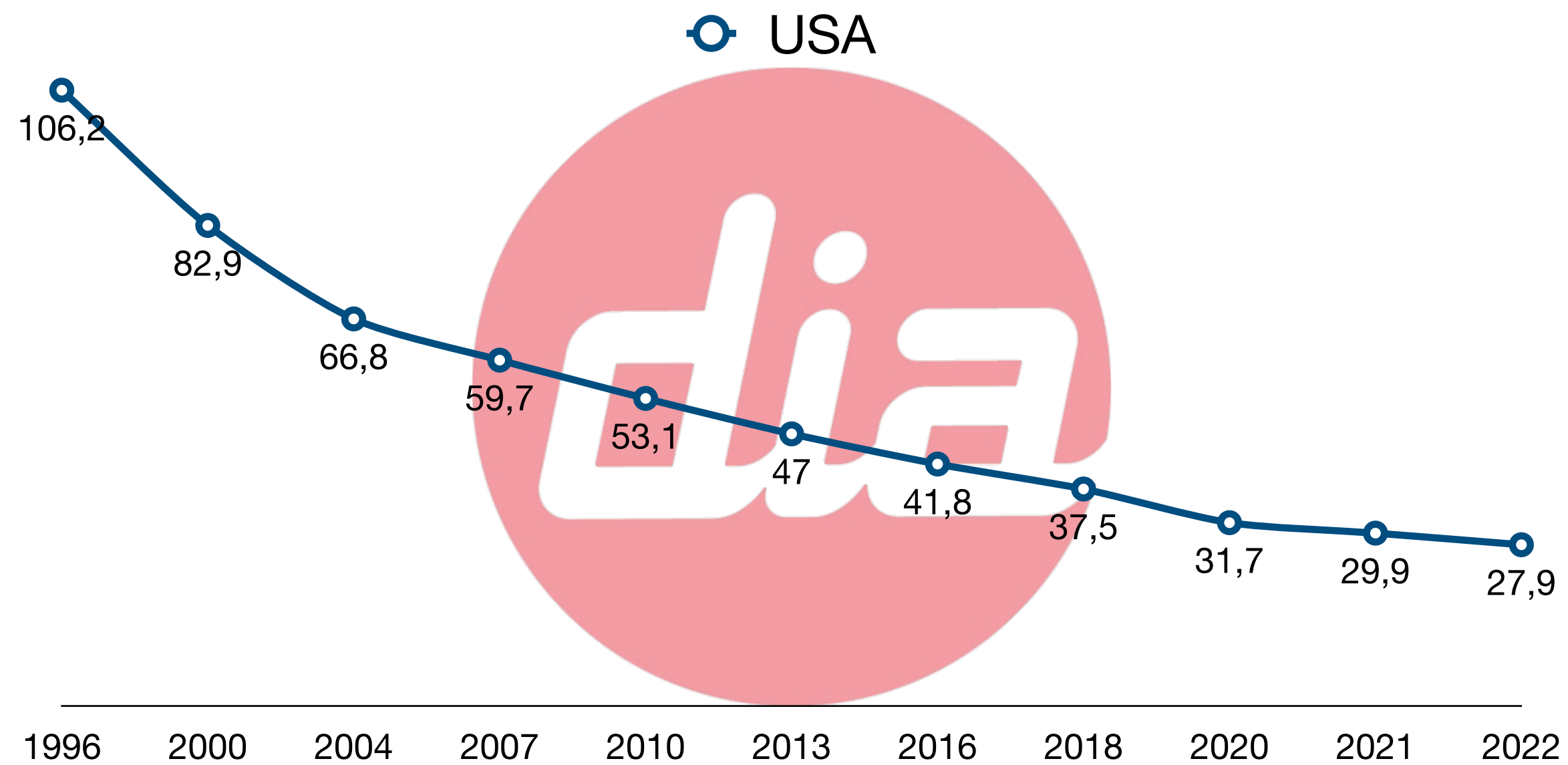
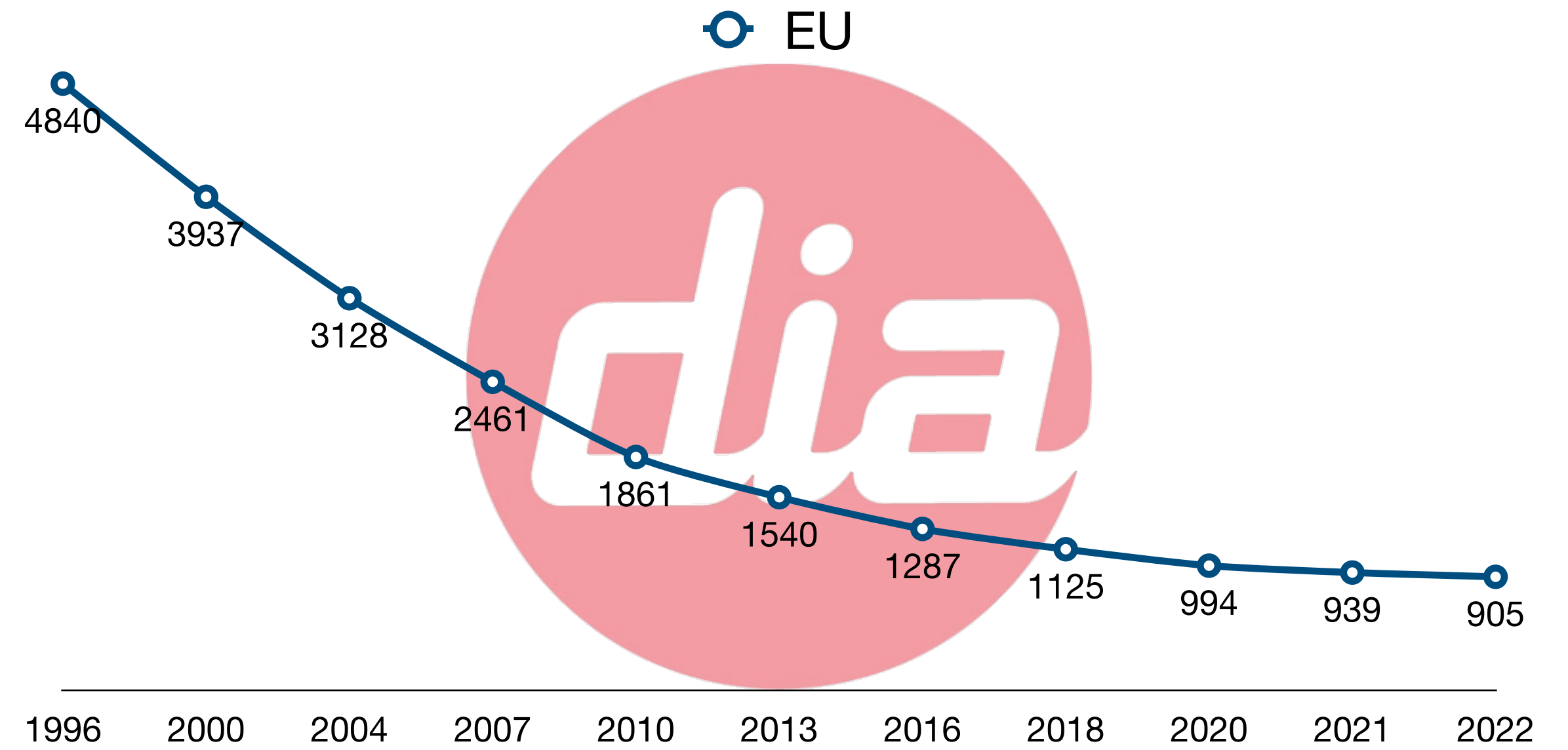
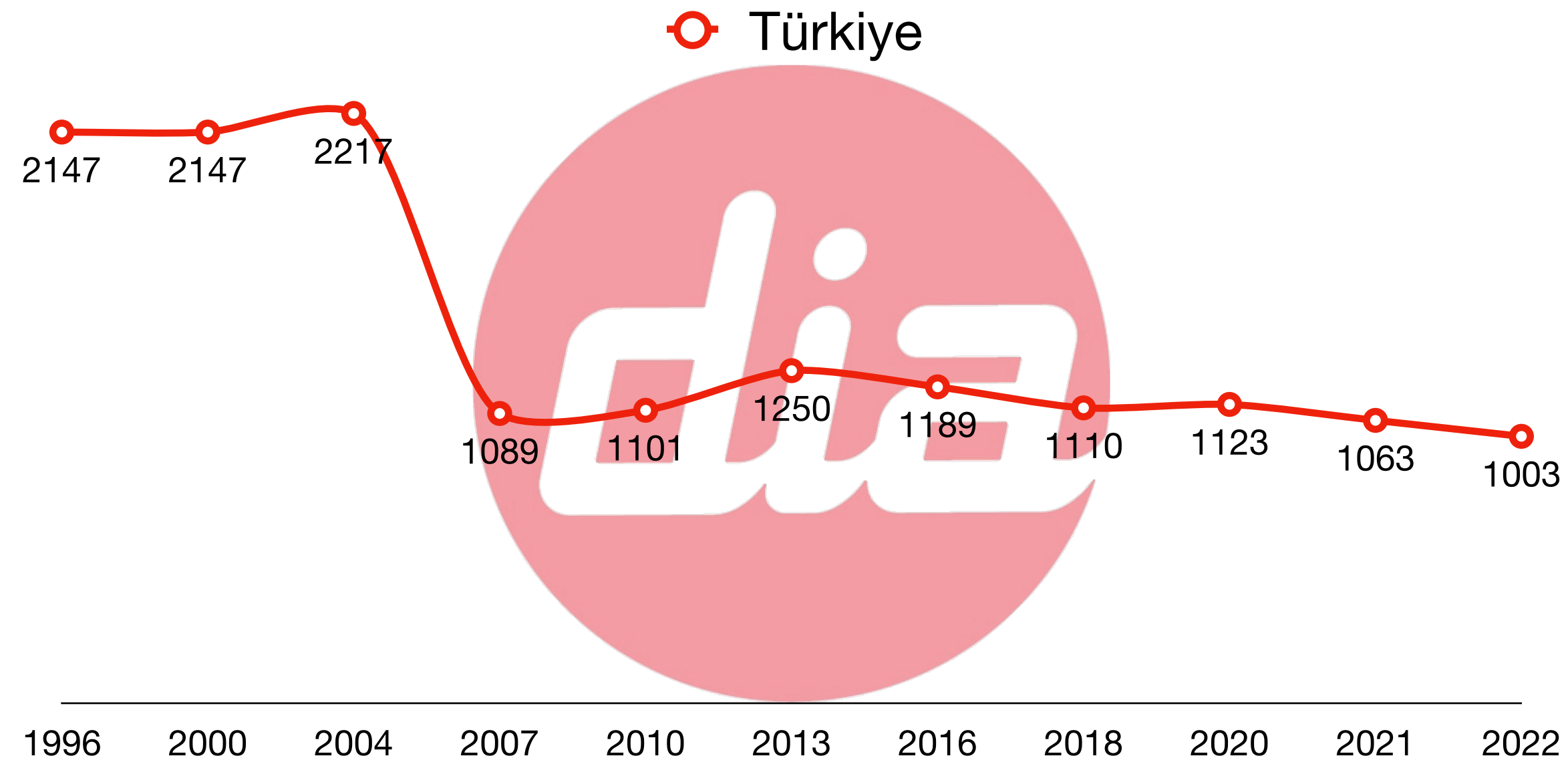
Increase and decrease in milk production

2023 vs 2030 in mill t

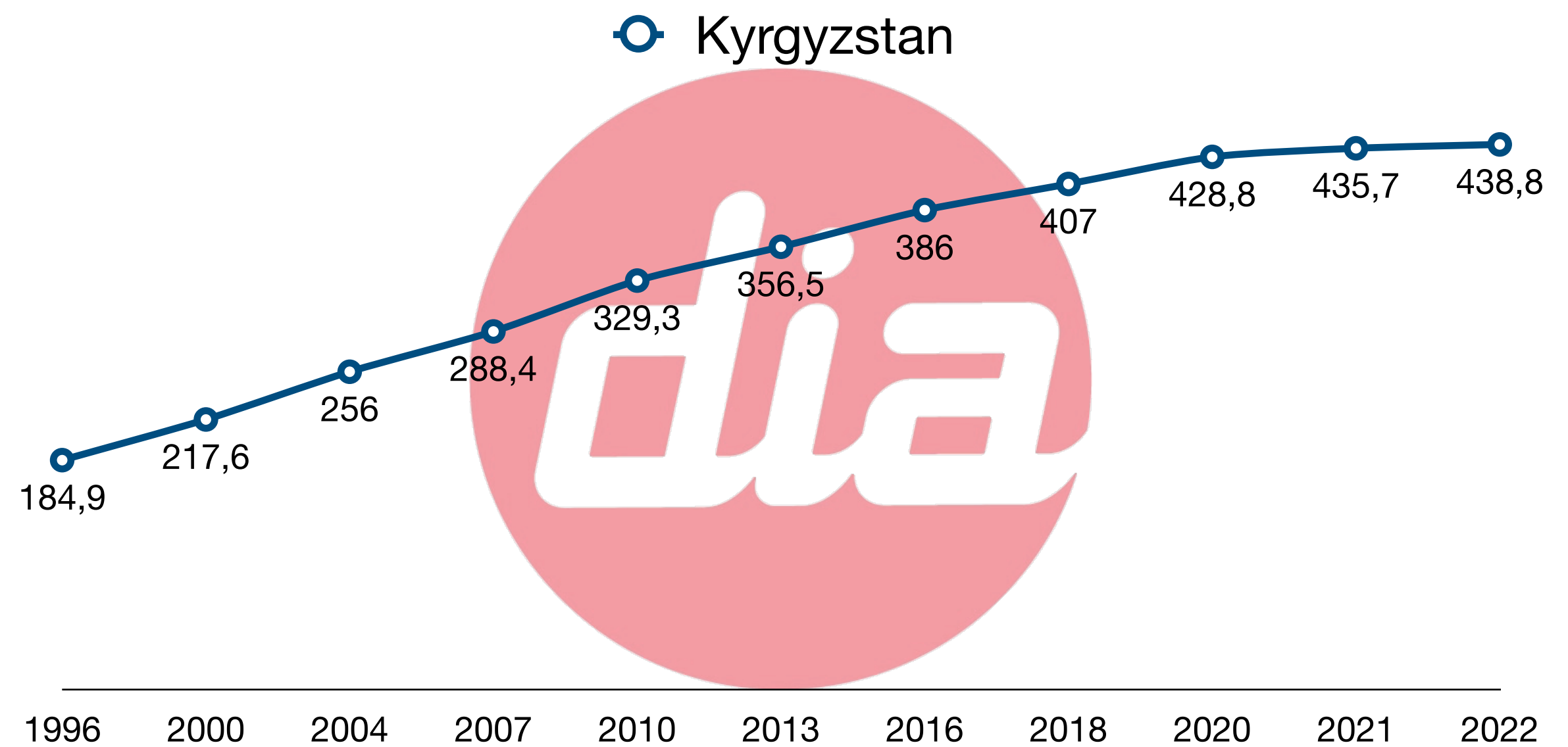
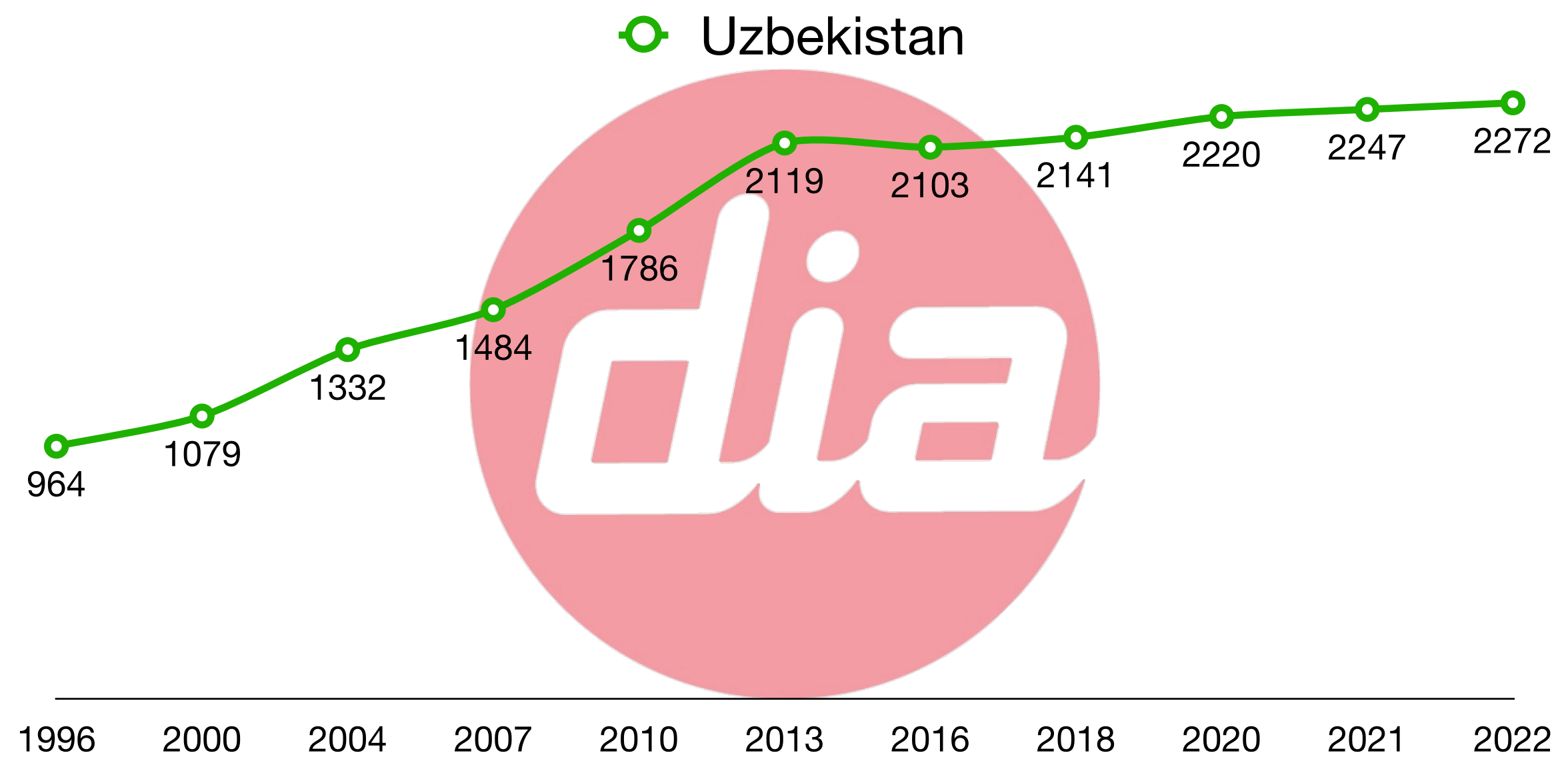
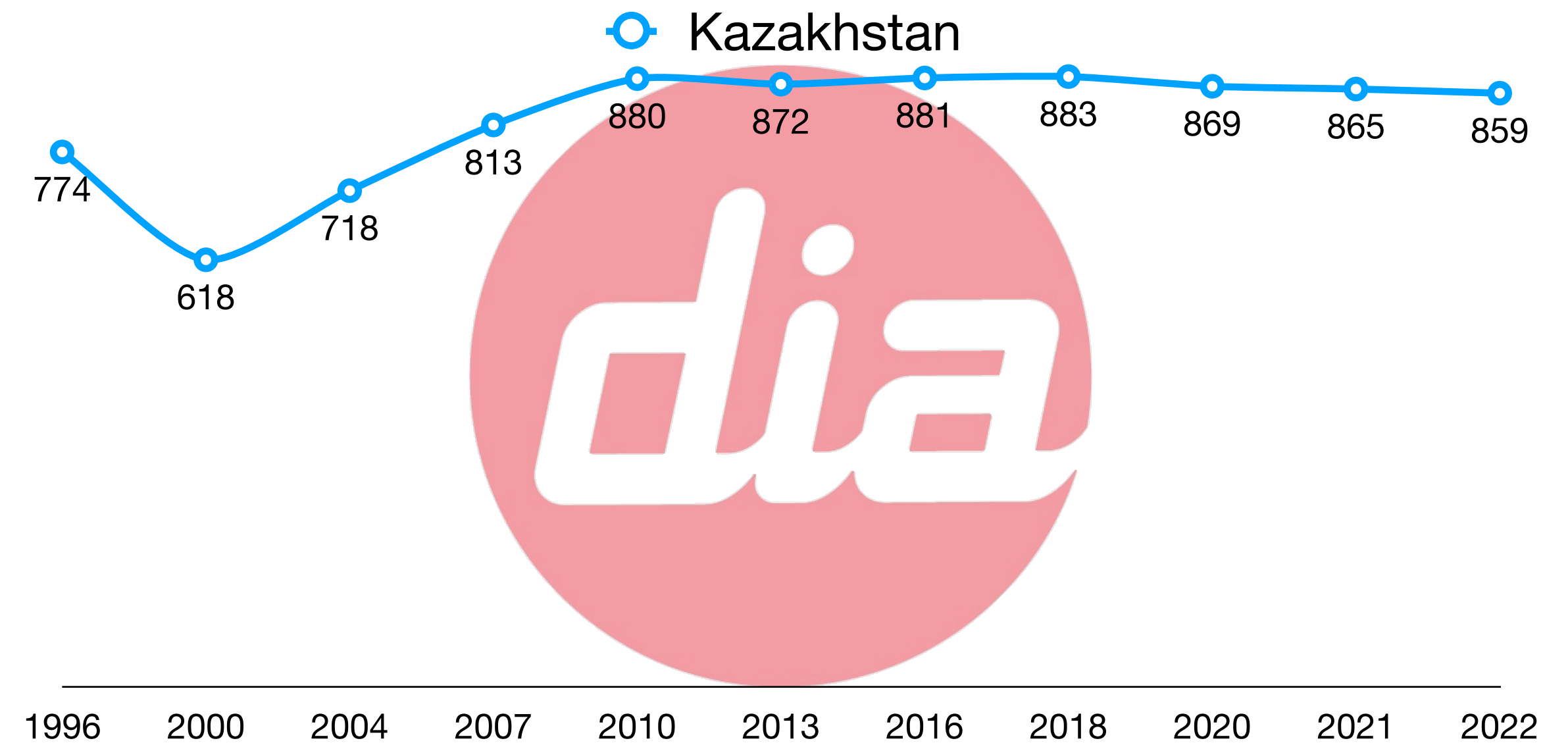
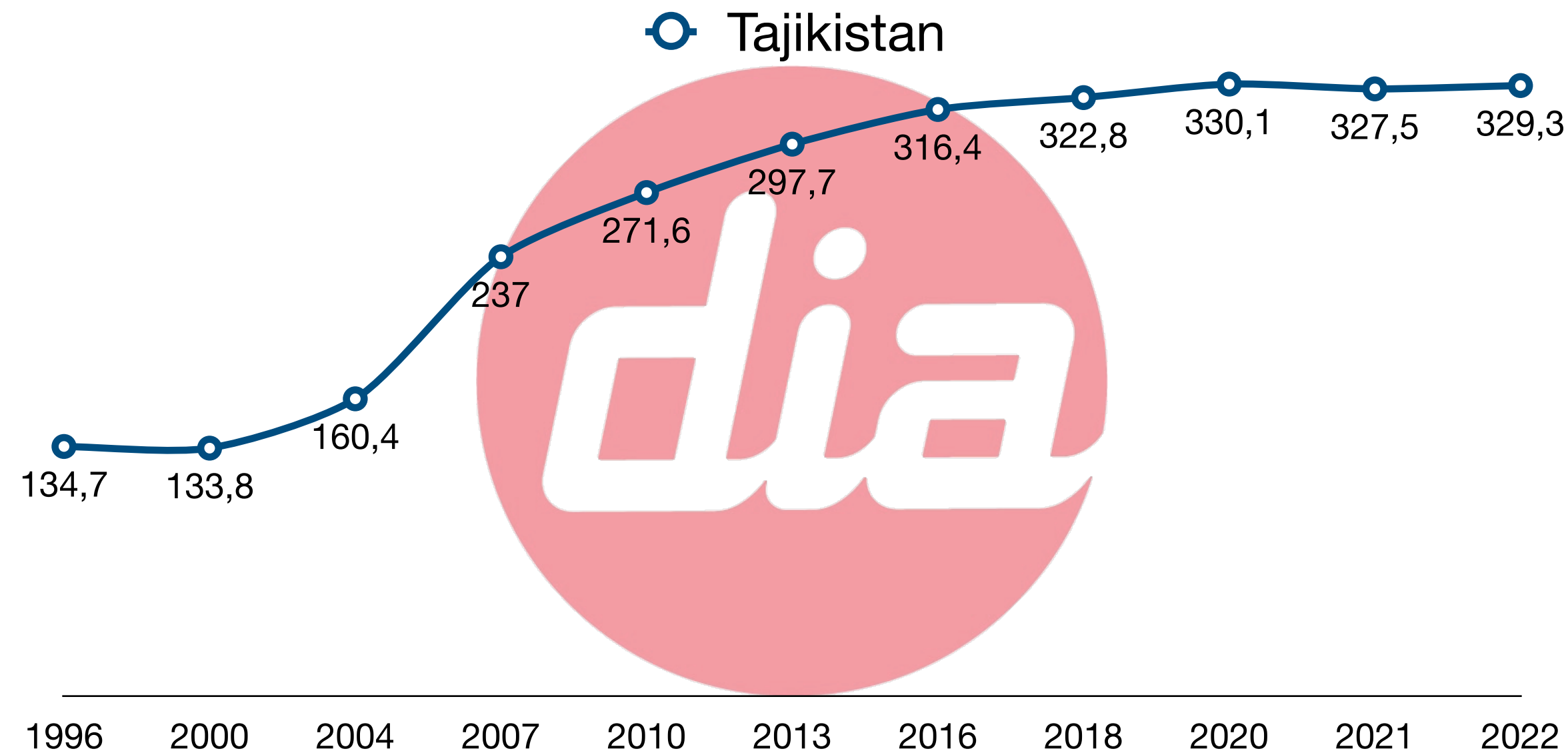


- 1) EU-15 is losing milk production by **-9.1 mill t SCM** until **2030**
- 2) EU - 13 is only growing by **2.5 mill t** until **2030**
- 3) Poland only is growing by **2 mill t** until **2030**

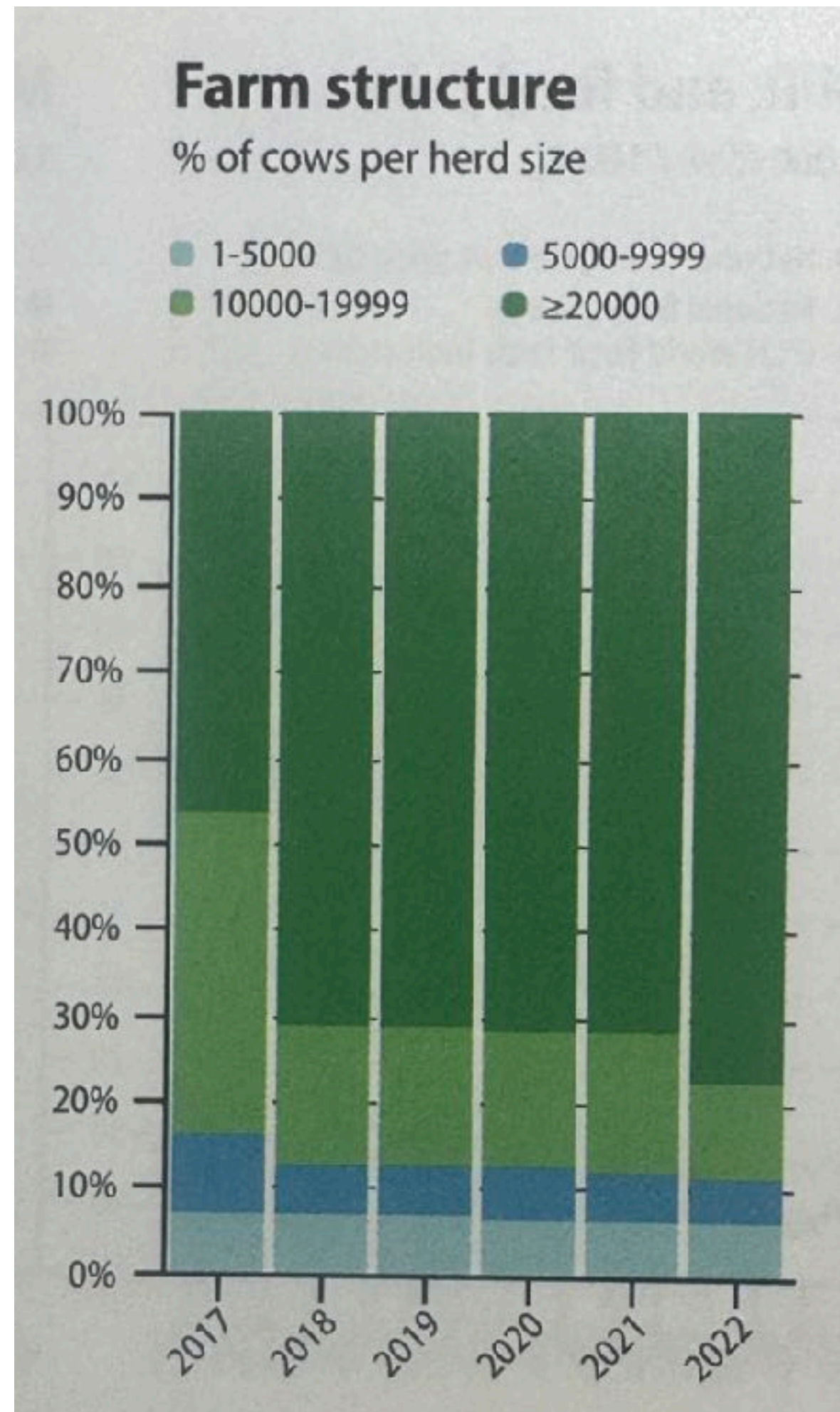
Number of dairy farms,



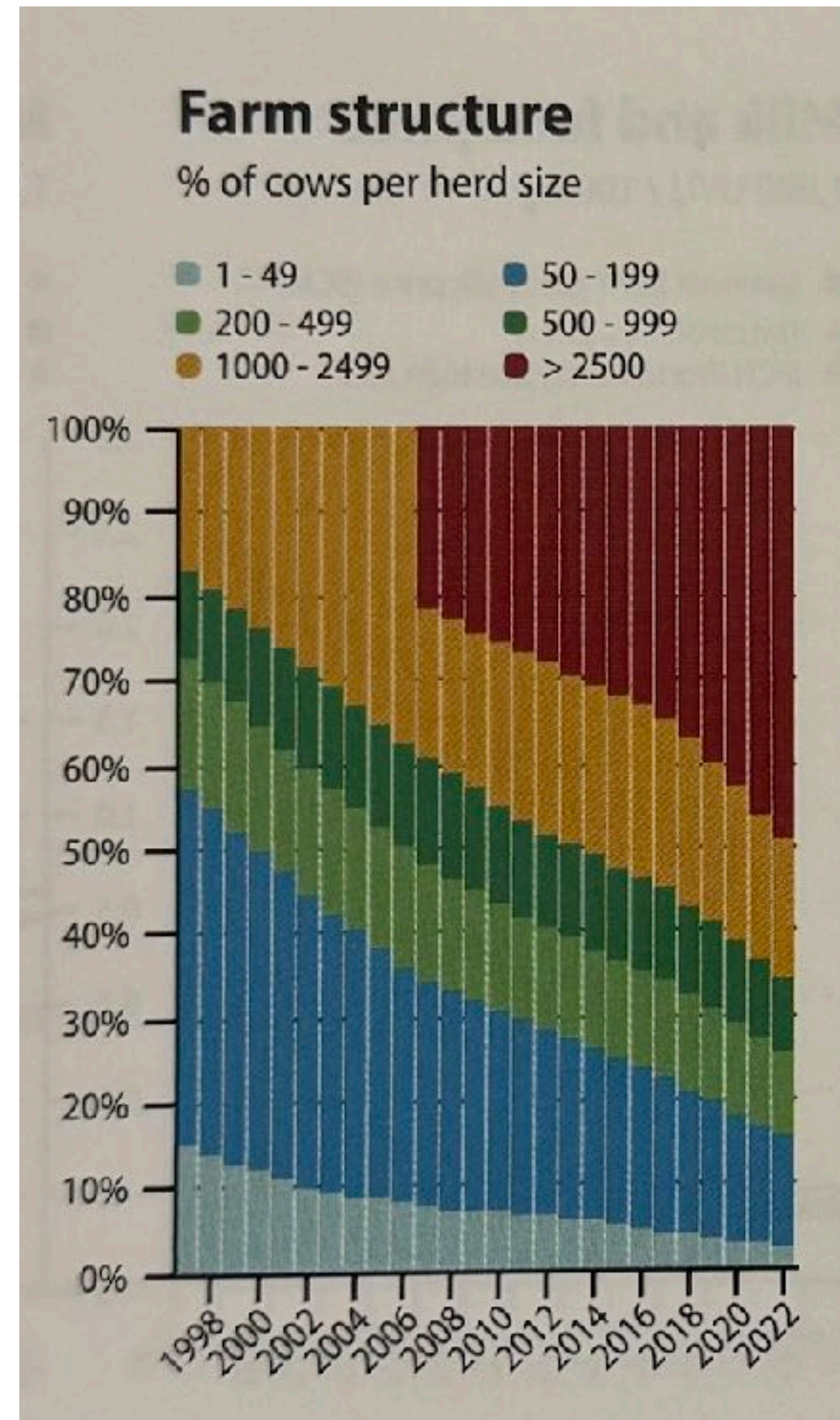
Number of dairy farms,



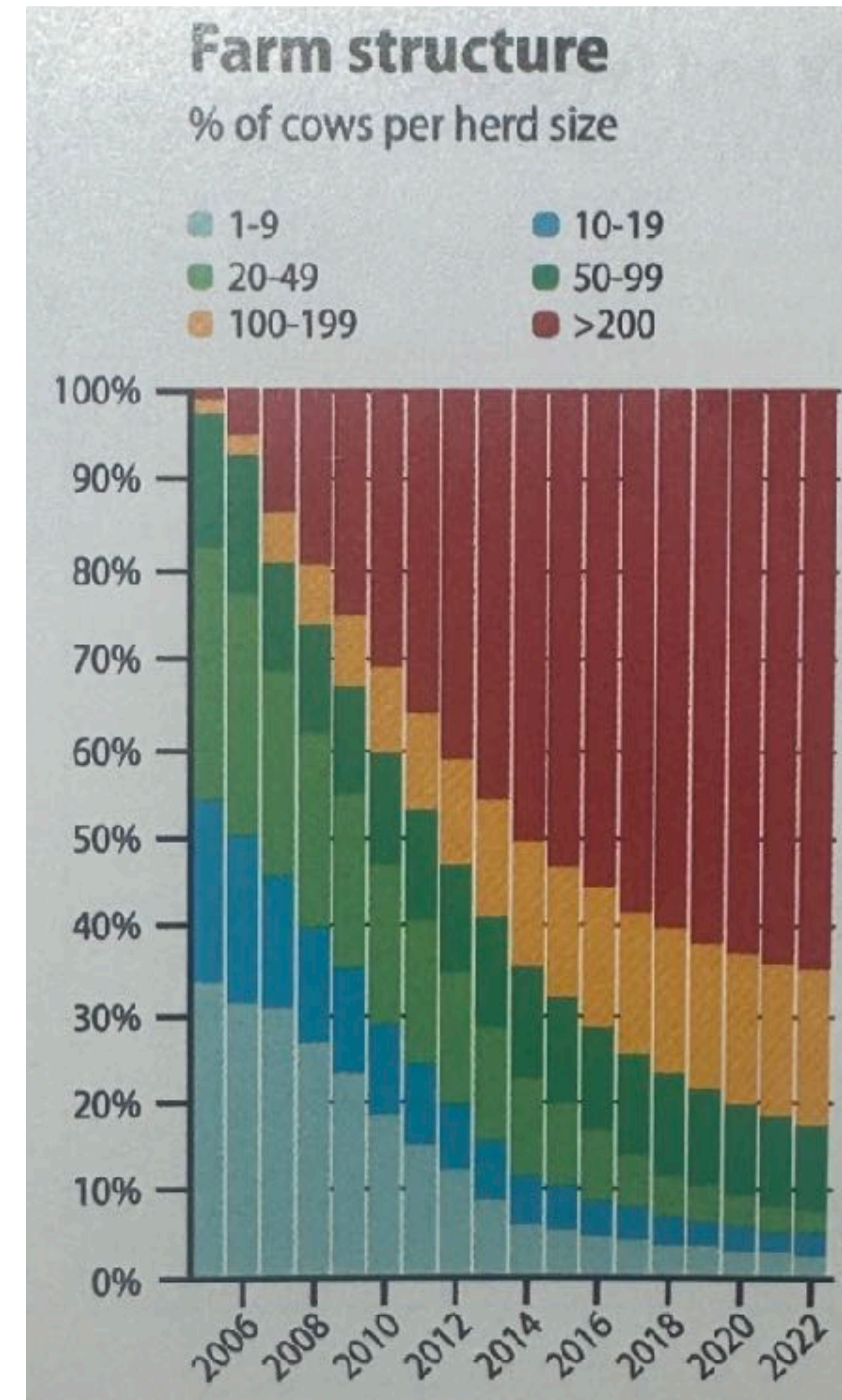
Saudi Arabia



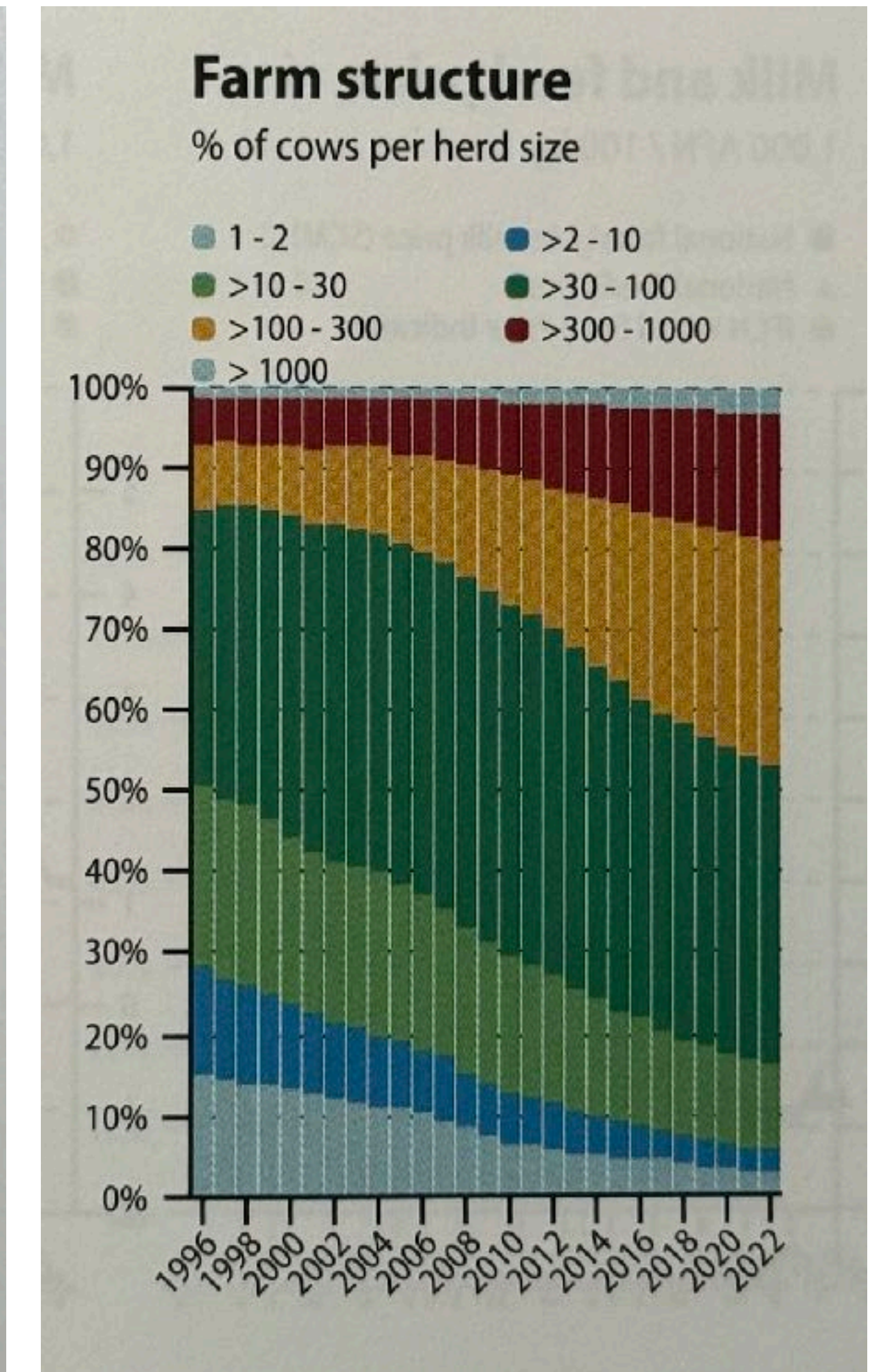
USA



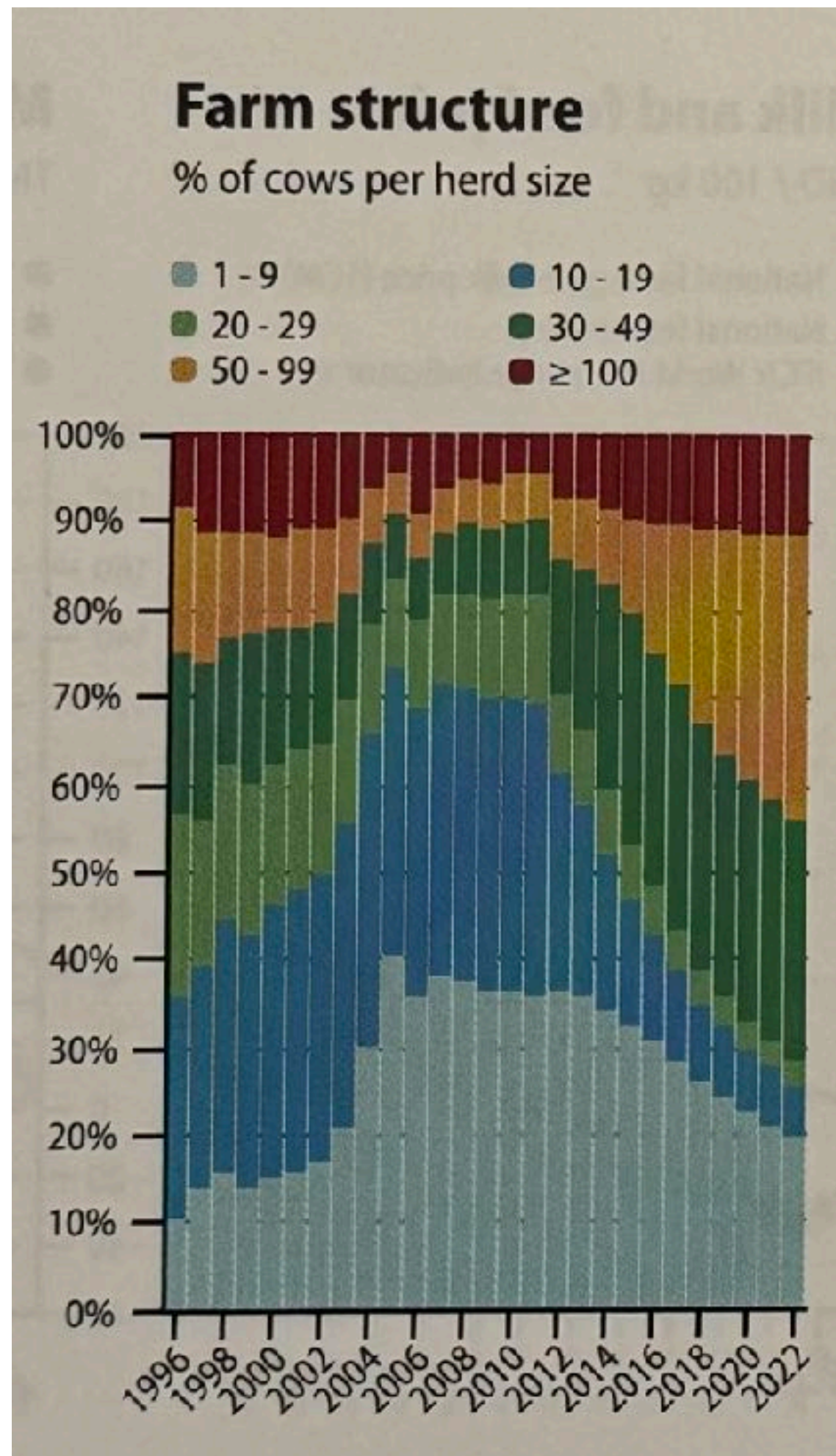
Oman



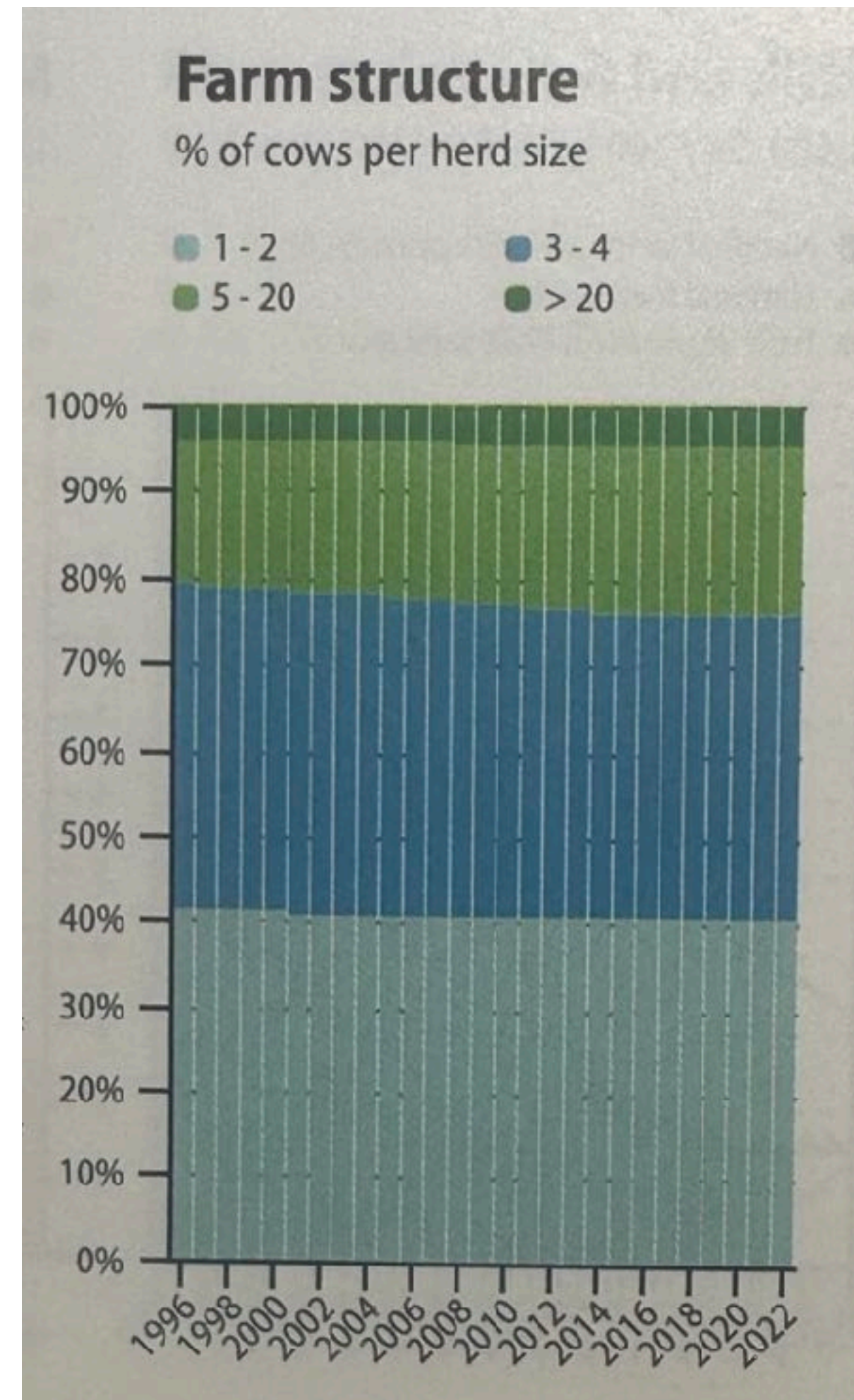
EU



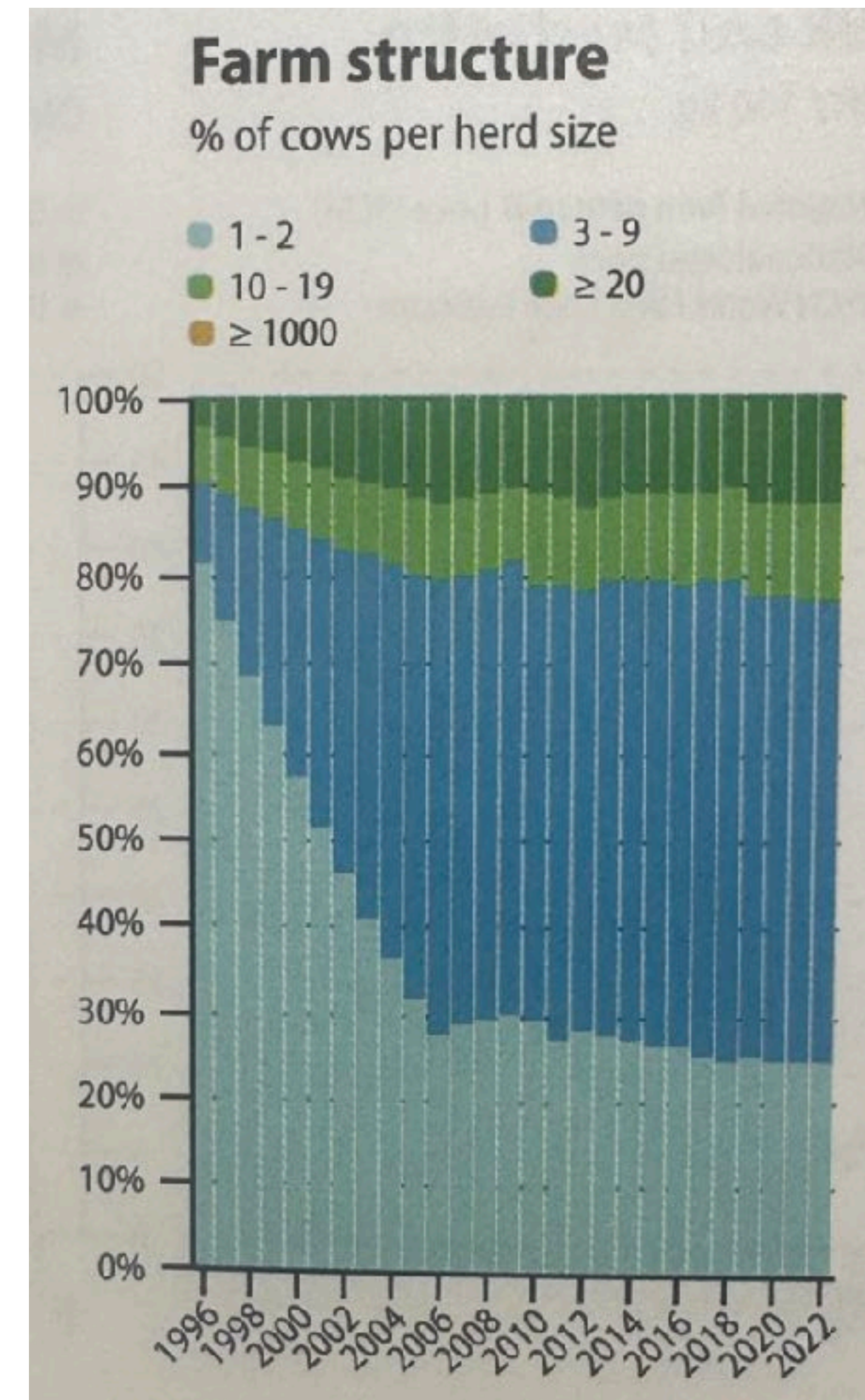
Türkiye



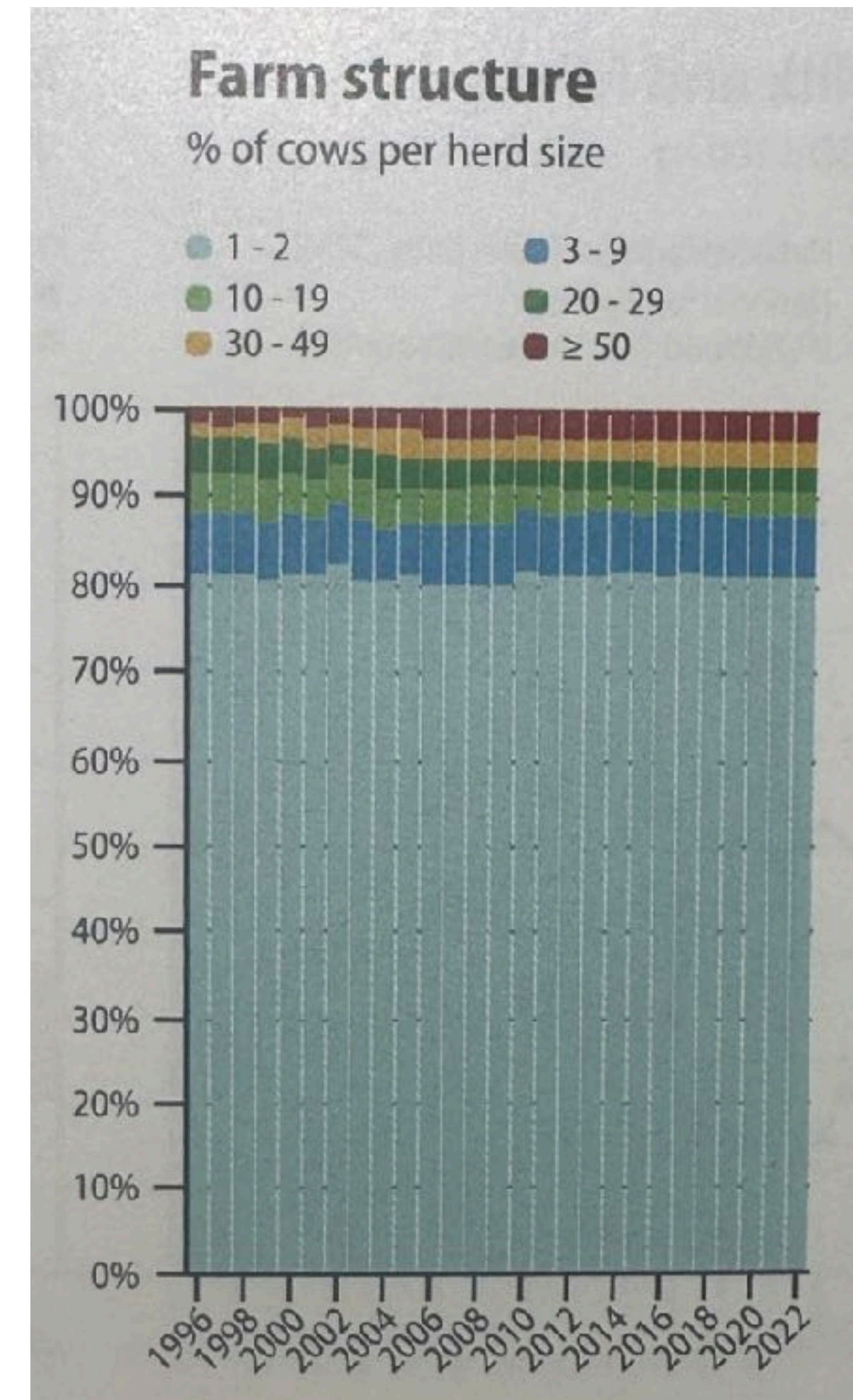
India



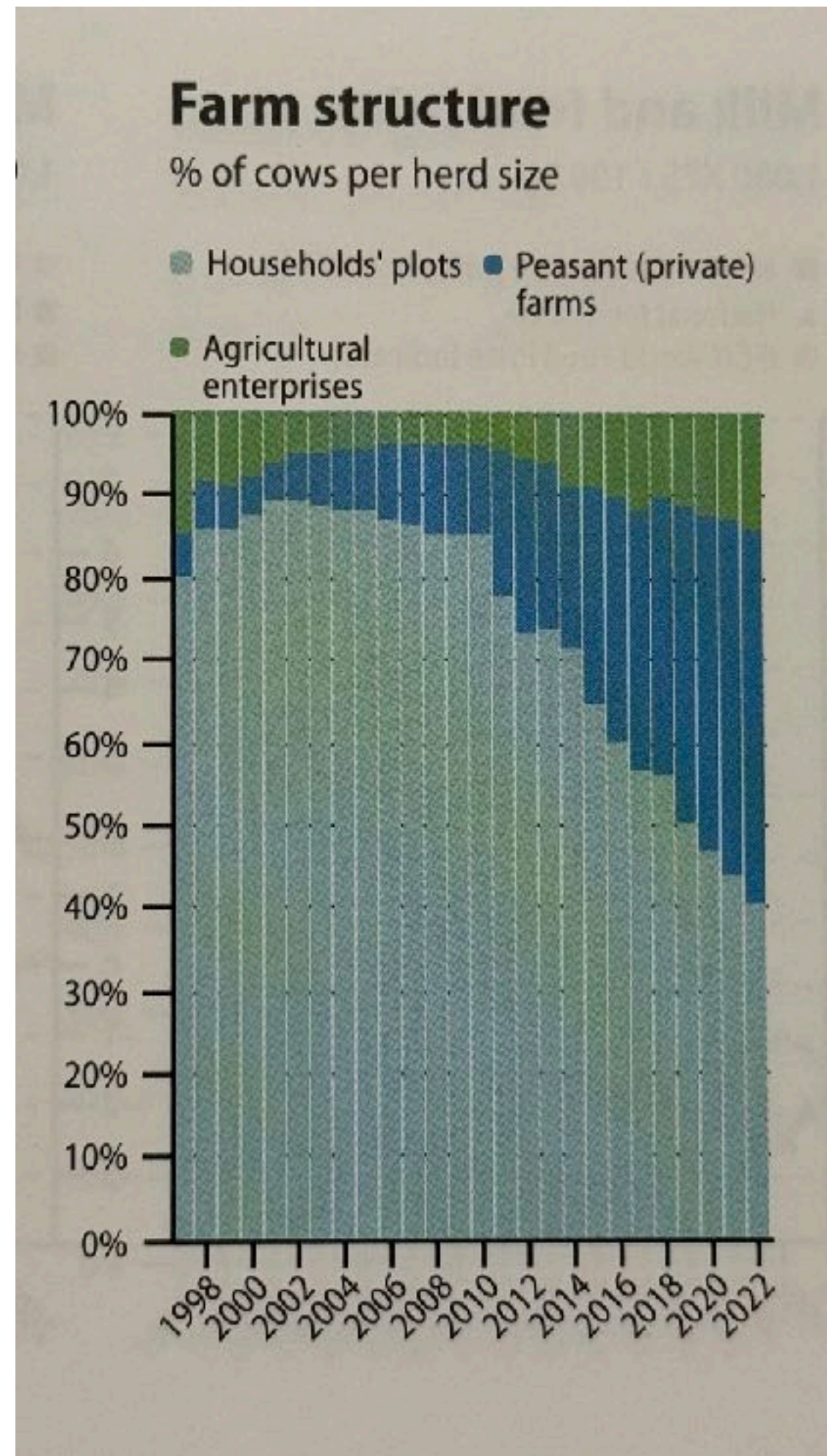
Pakistan



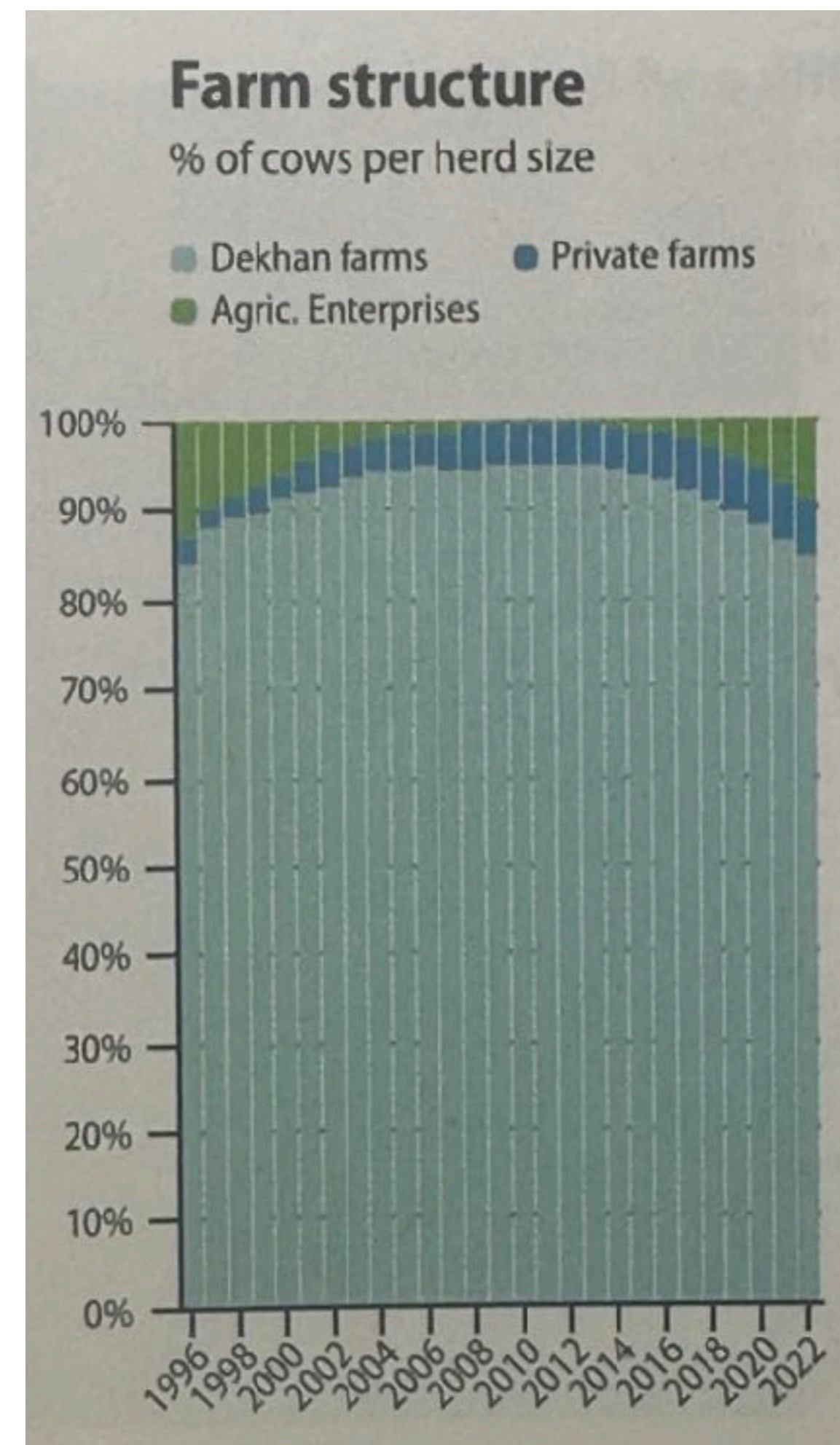
Egypt



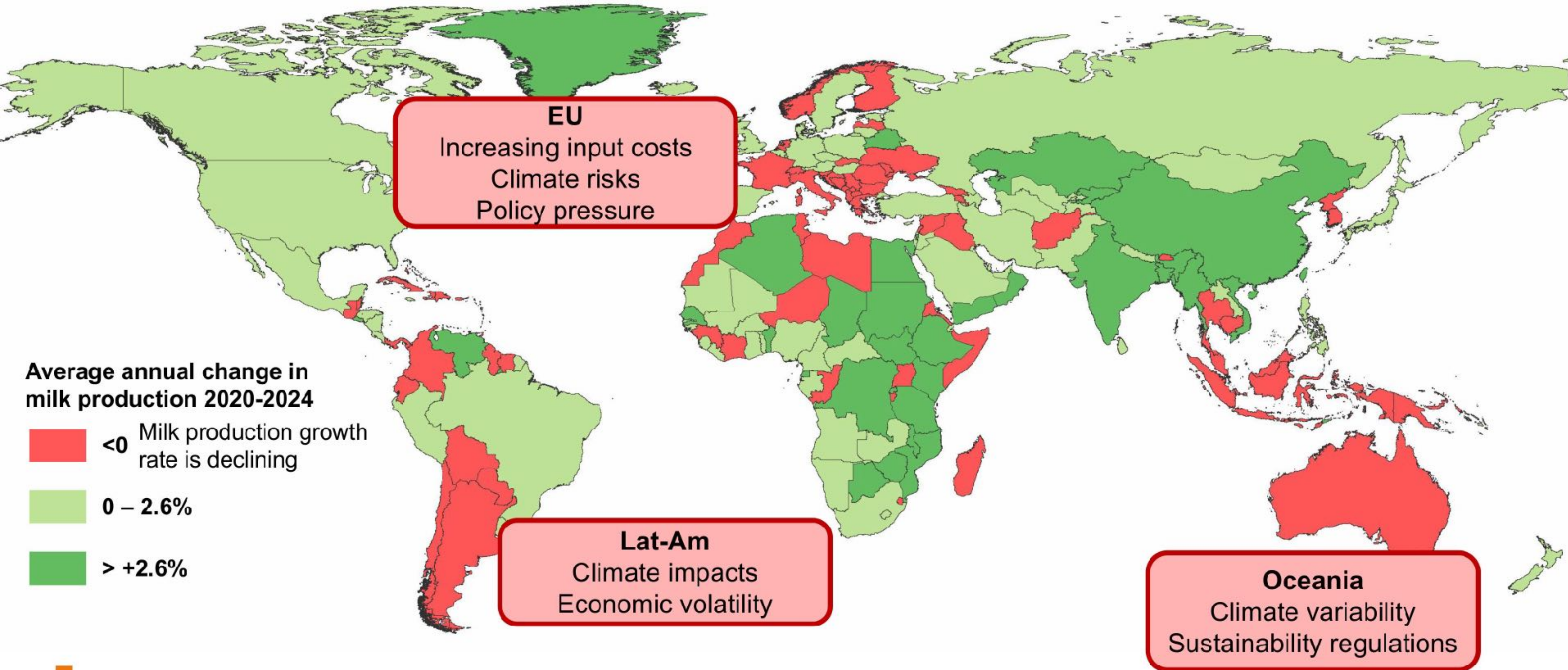
Kazakhstan



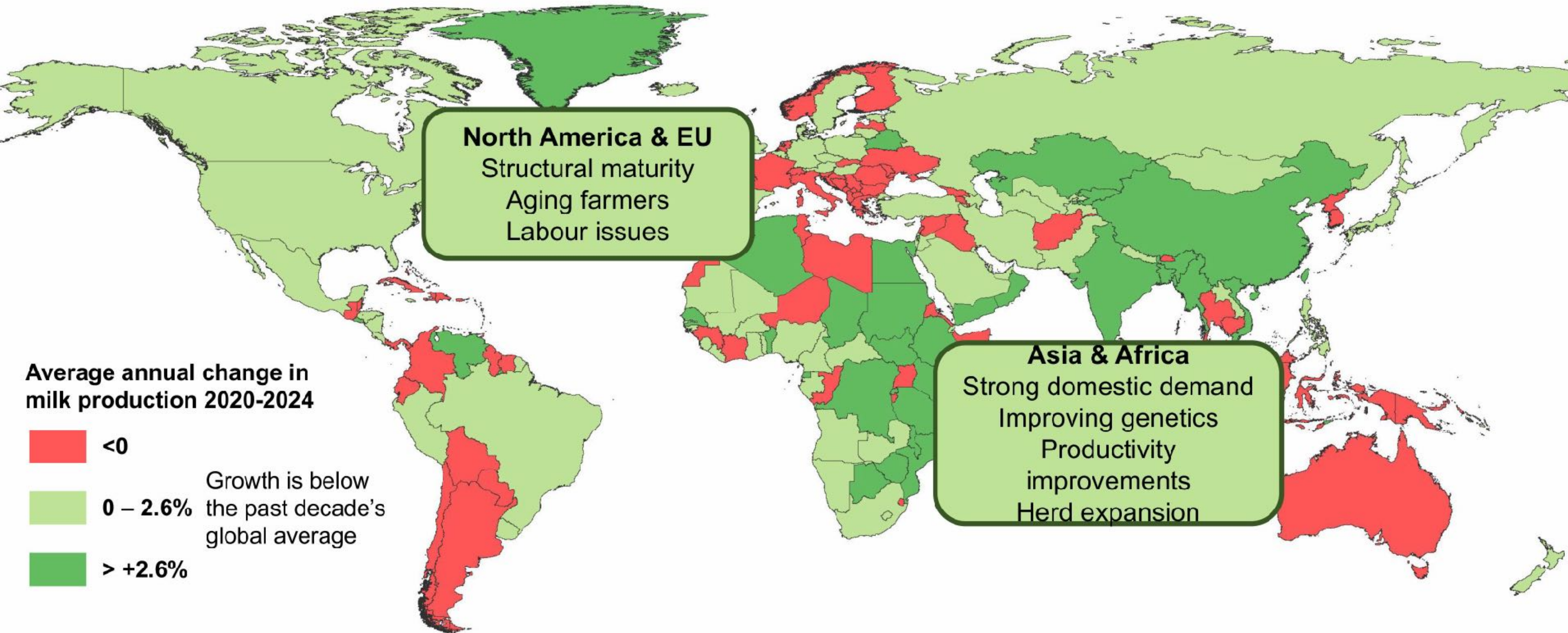
Uzbekistan



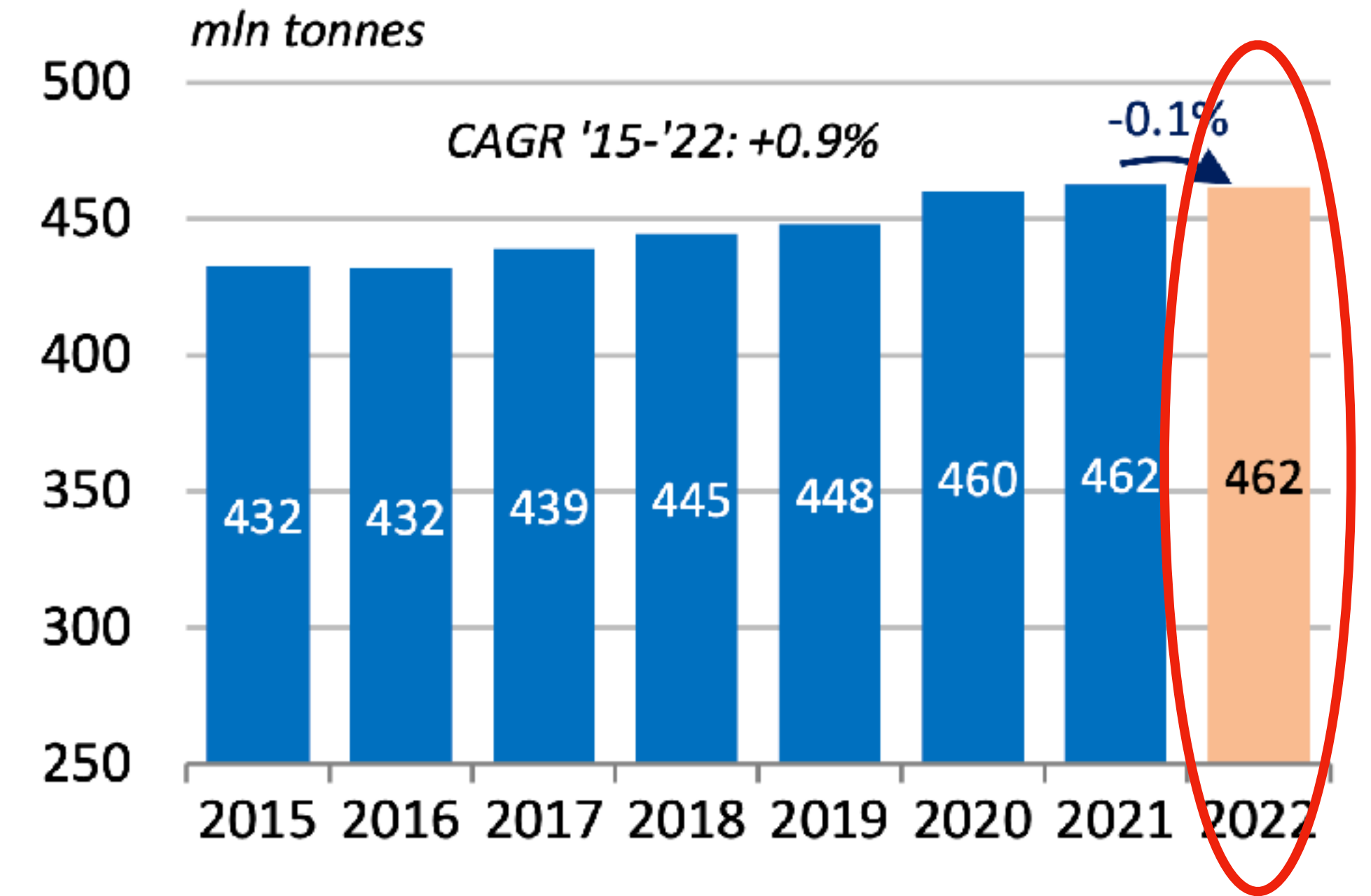
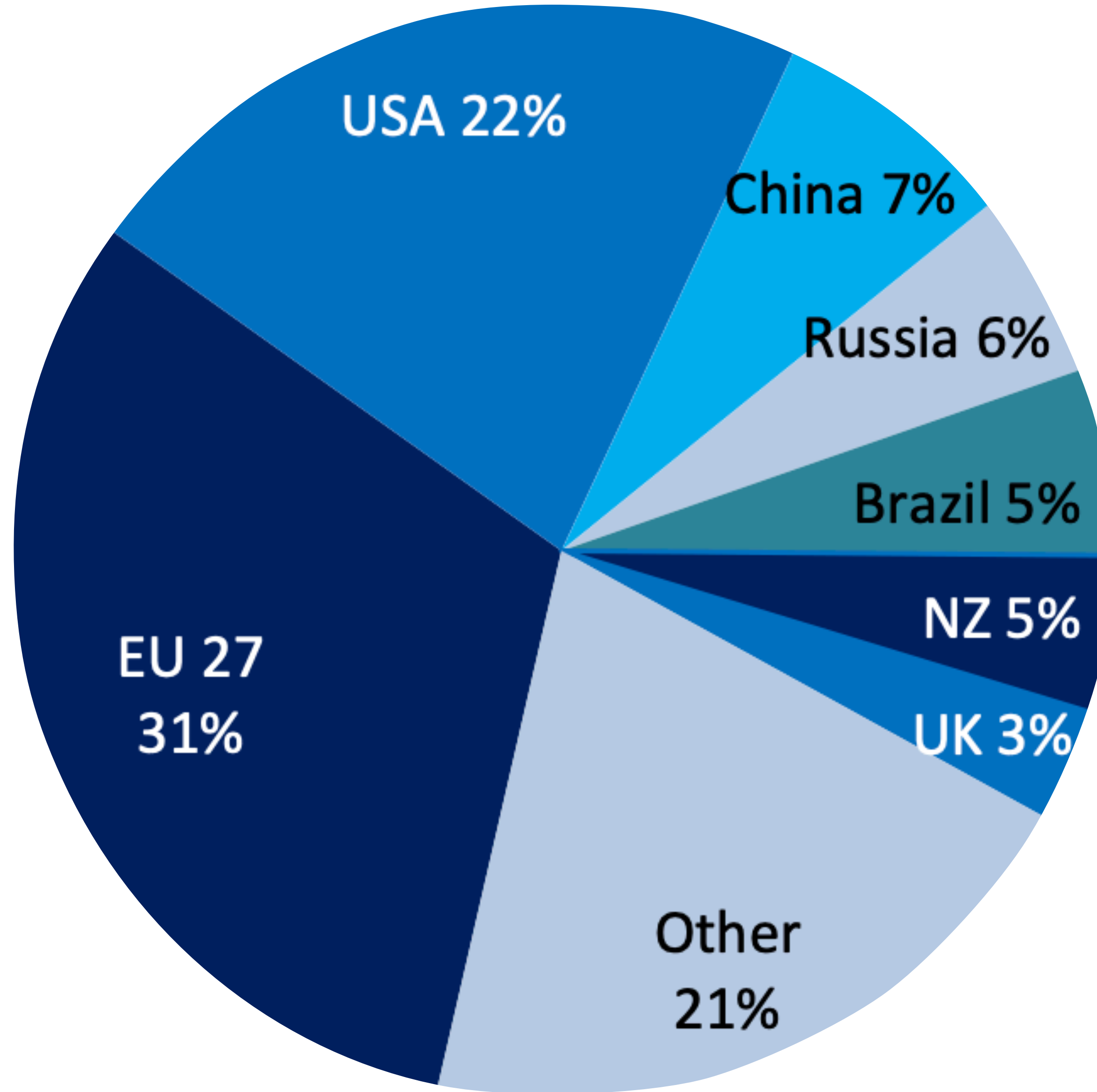
Historically strong producers are slowing down, while Asia and Africa are growing



Historically strong producers are slowing down, while Asia and Africa are growing

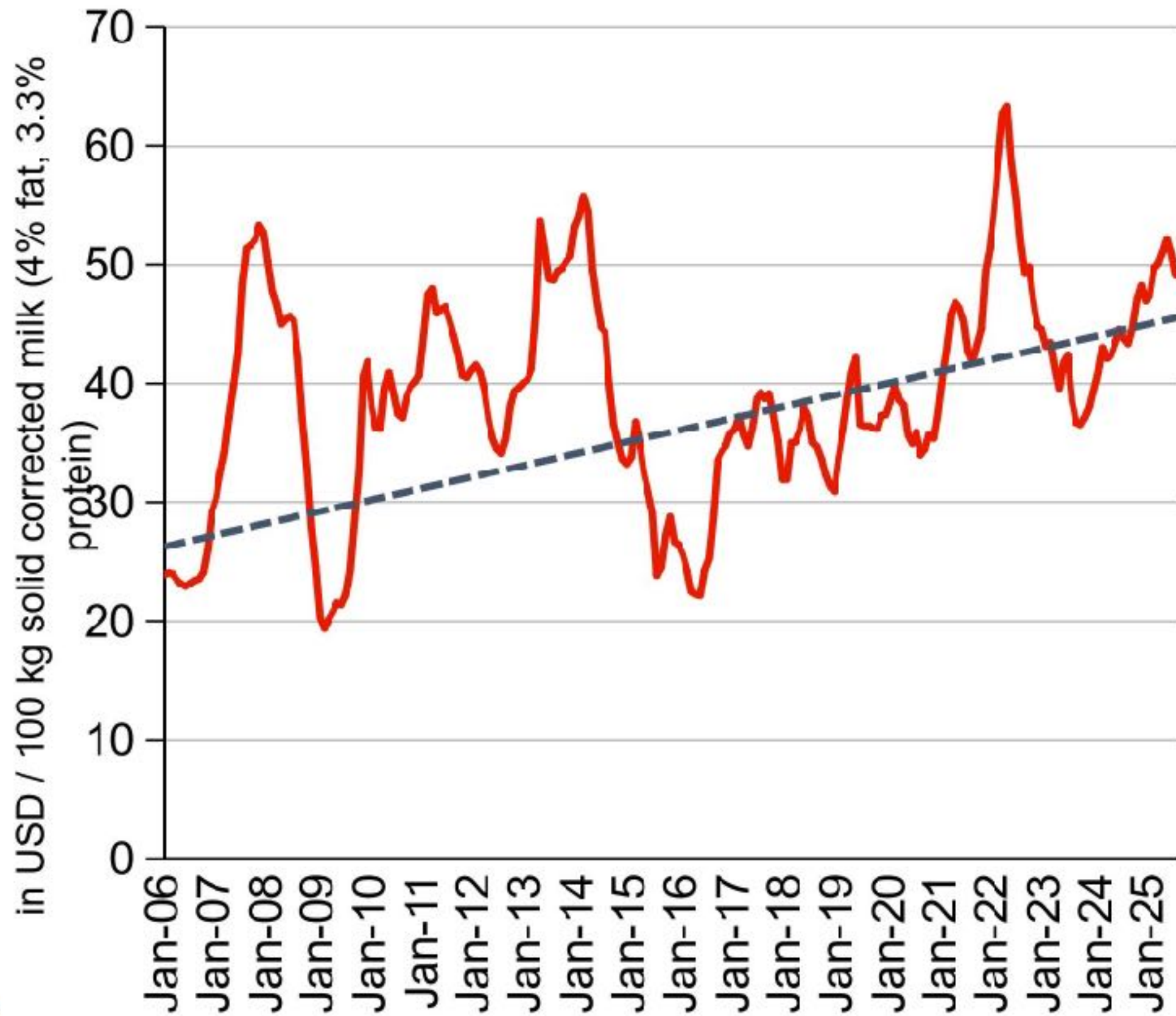


Milk delivering 2024



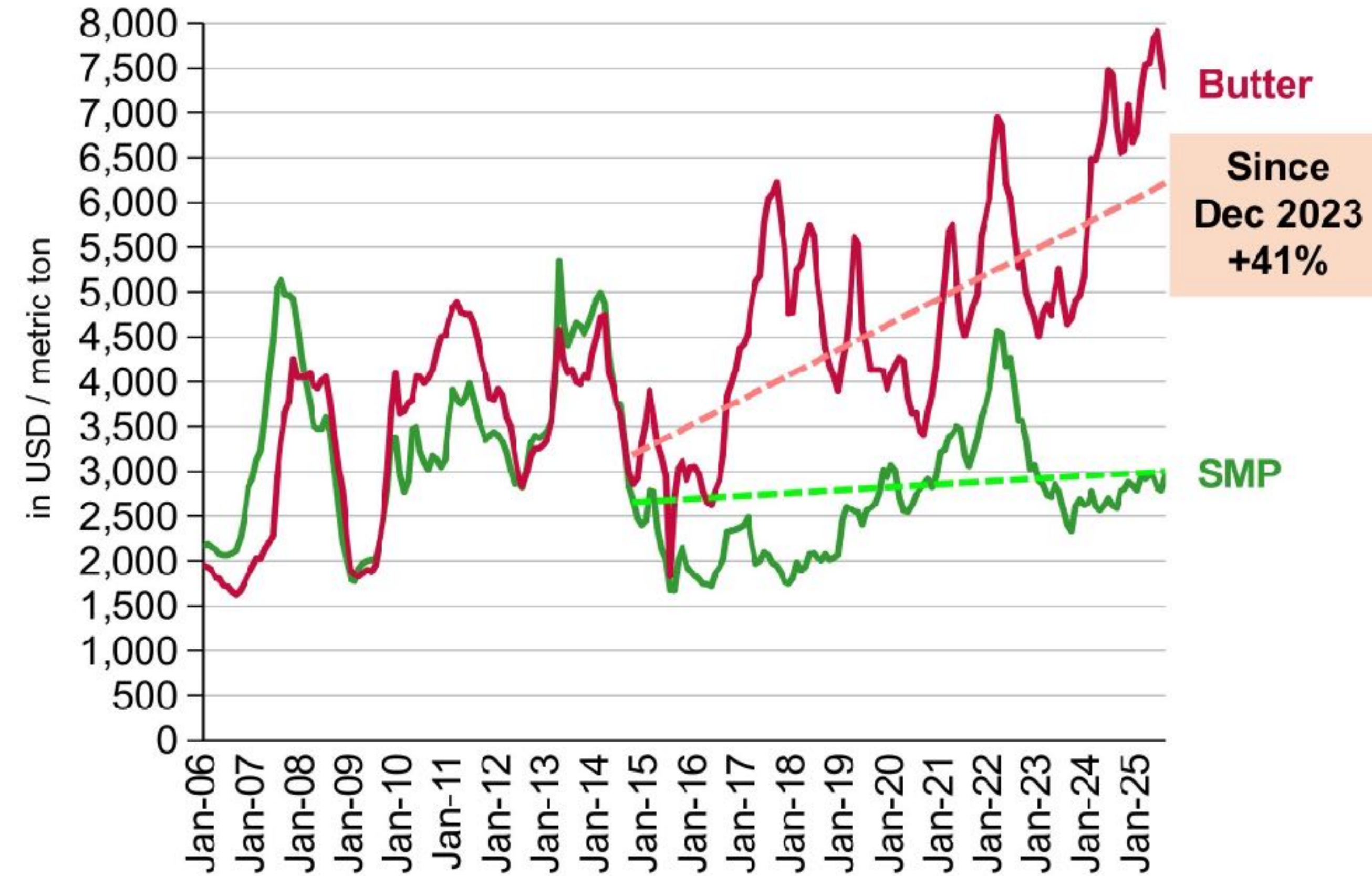
Changes in consumption patterns pushing prices up for butter and driving the world milk price developments

IFCN World Milk Price Indicator



*IFCN world milk price is based on the dairy commodity prices for butter/SMP, cheese/whey and whole milk powder; mainly Oceanian prices;

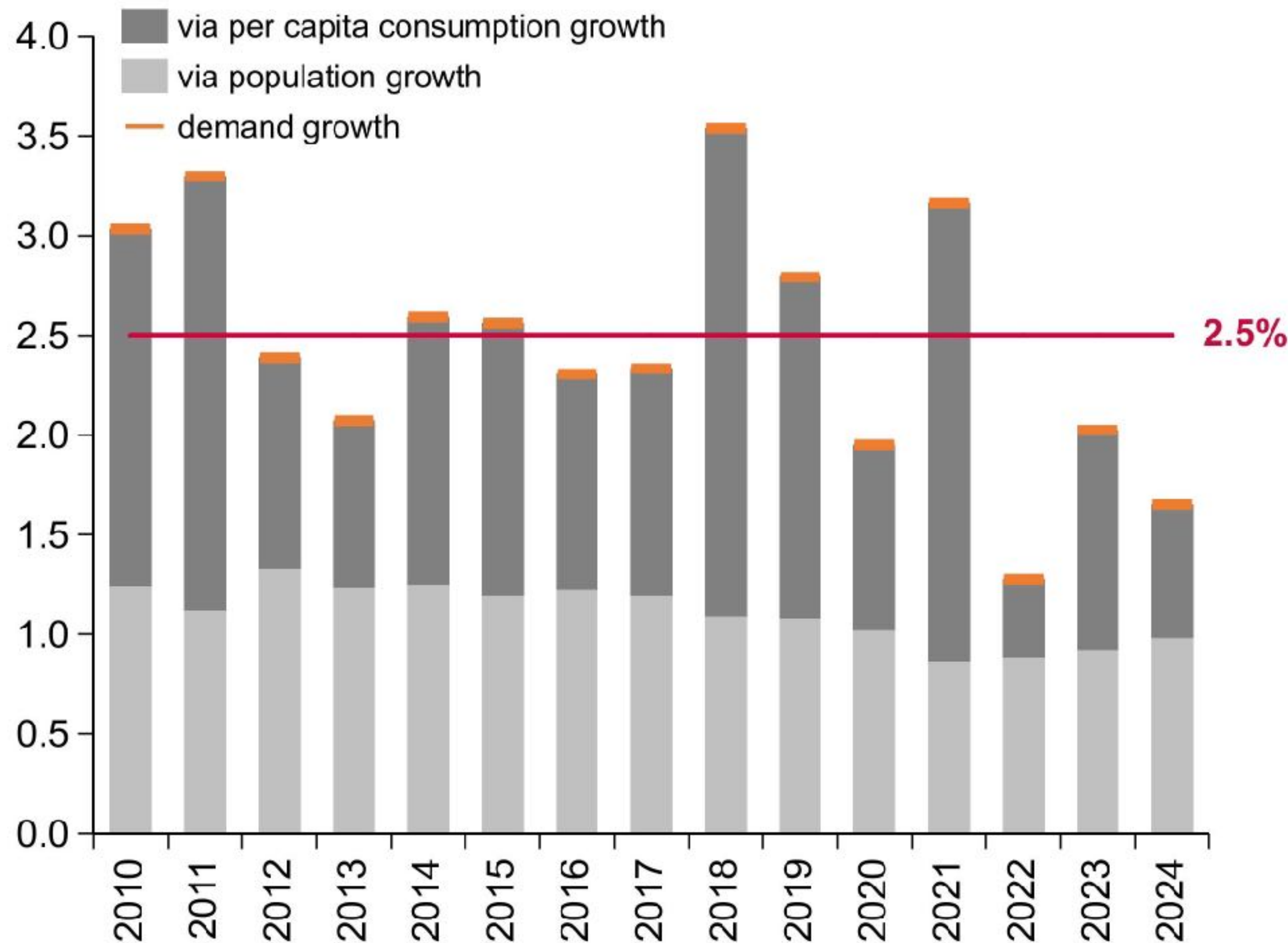
Dairy Commodity Prices



***SMP/Butter : monthly weighted average of bi-weekly Oceania export prices

Global dairy demand is rising, but unevenly: Shaped by policy, prices, and affordability

Annual % change of milk demand drivers

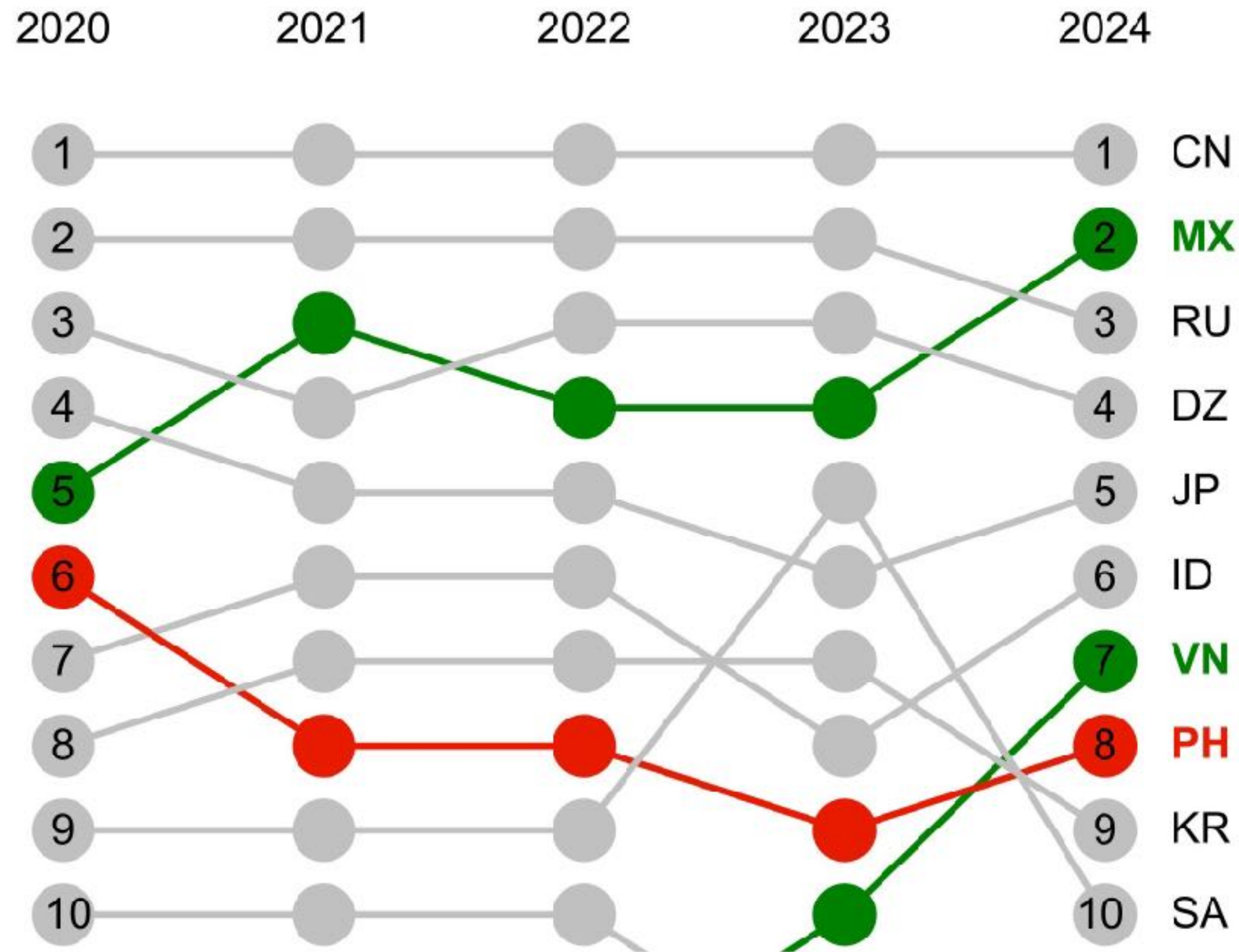


Global demand grew by +1.6% driven by population growth (+1.0%) and per capita consumption (+0.6)

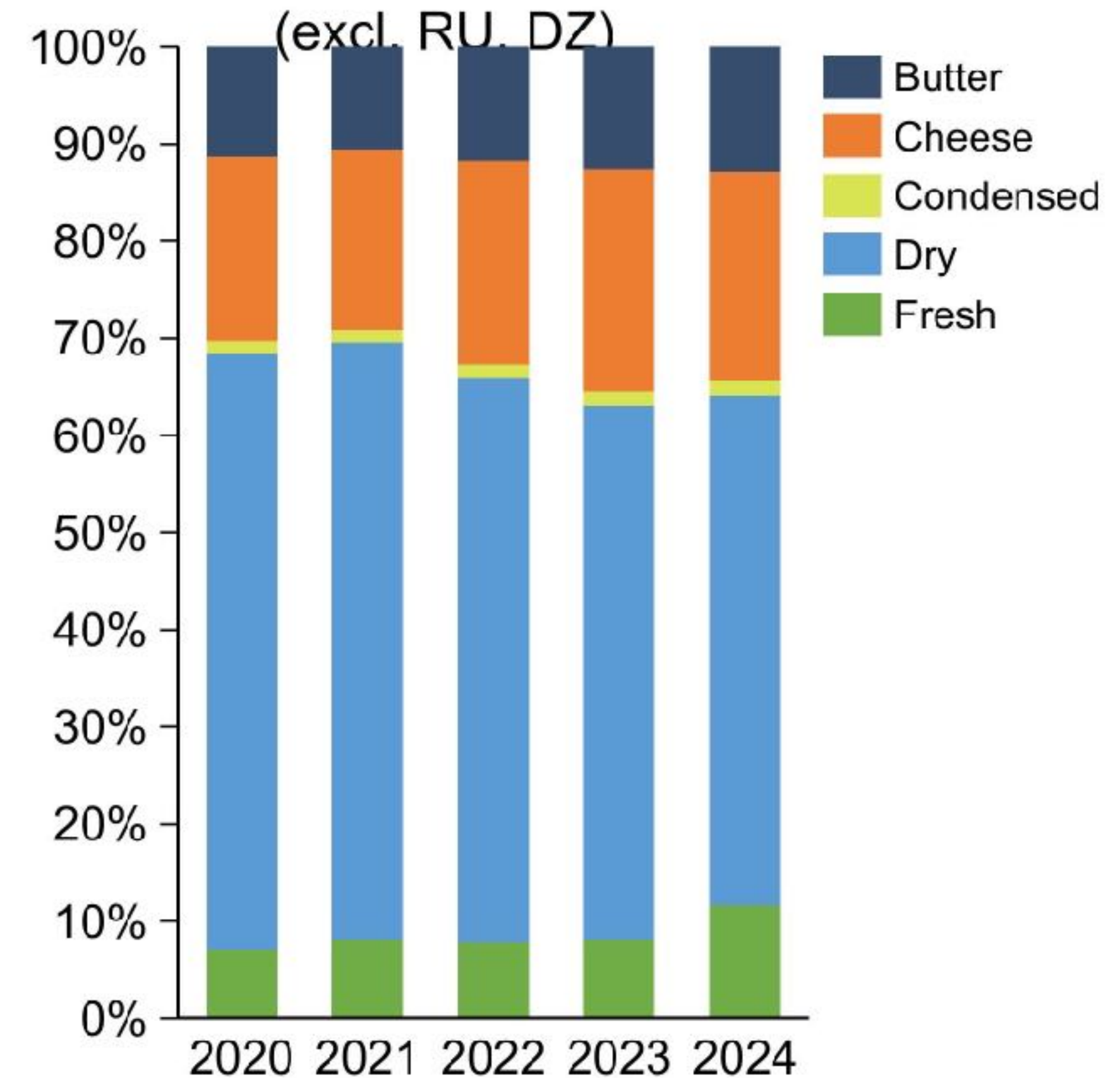
- **India +3.3% (2024 vs. 2023)** → higher incomes and more people living in cities
- **Turkey +2.9% (2024 vs. 2023)** → strong interest in fresh dairy and new government program
- **Brazil +2.1% (2024 vs. 2023)** → decrease in the unemployment rate
- **Argentina -9.9% (2024 vs. 2023)** → high inflation and lower milk production

Global trade: Shifts in top dairy importers and consumption patterns

Top net dairy importers



Dairy imports from top dairy importers (excl. RU, DZ)





+0.8 billion more people



+9 kg more “milk” consumed



+1 mill t ME more traded*



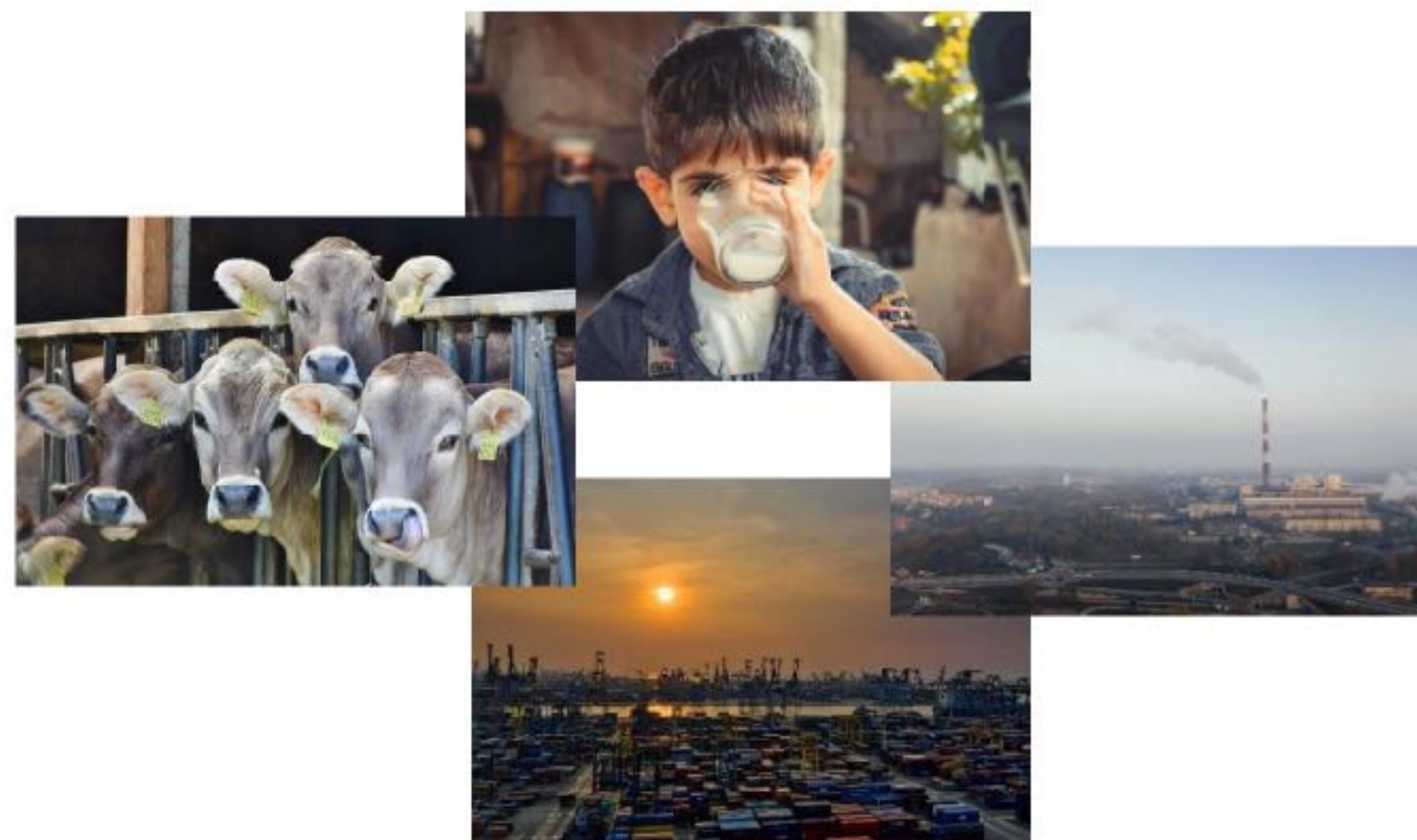
-29 mill fewer dairy “cows”



-19 mill fewer dairy farms

Dairy World in 2035 vs. 2024*

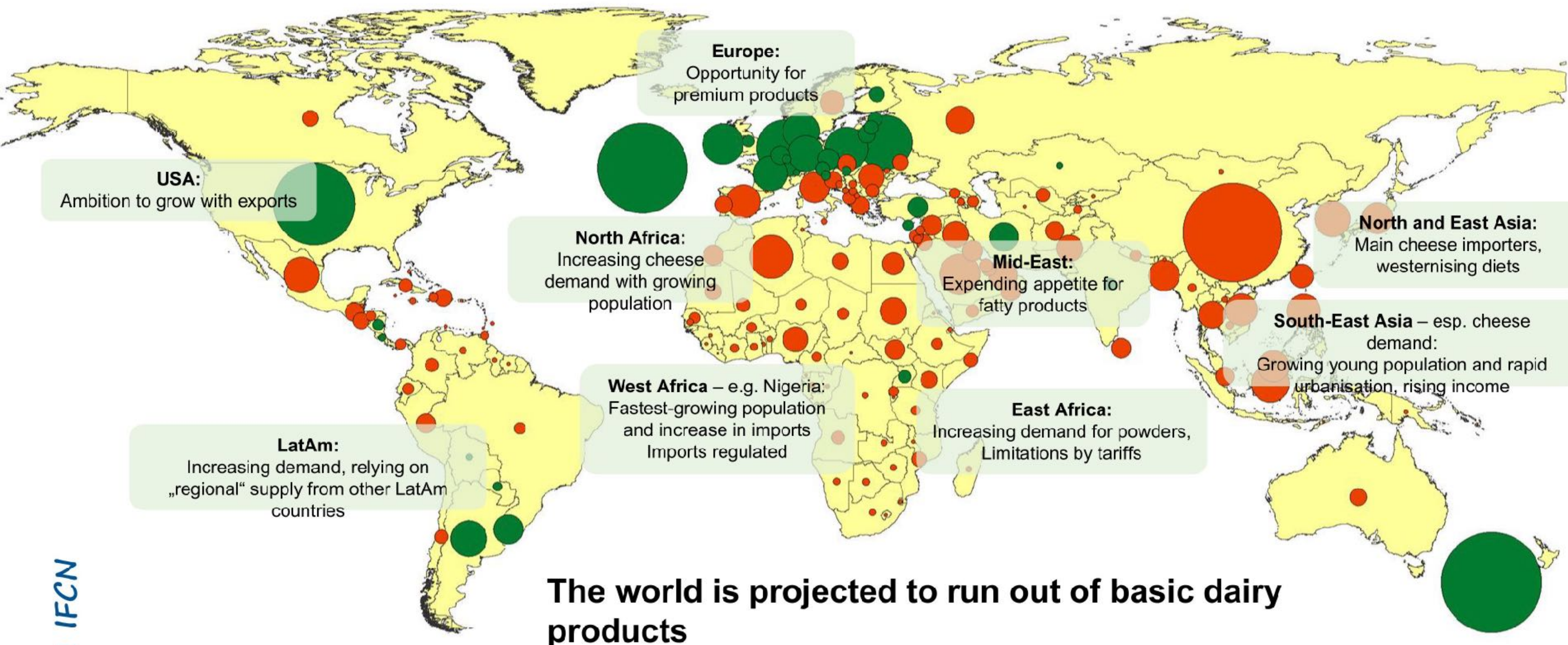
**+15% more milk
produced and consumed**
+154 mill t SCM $\approx$ 1.5 x USA today



*IFCN Baseline Scenario - “Pro-Dairy”

Outlook 2035: turning challenges into opportunities

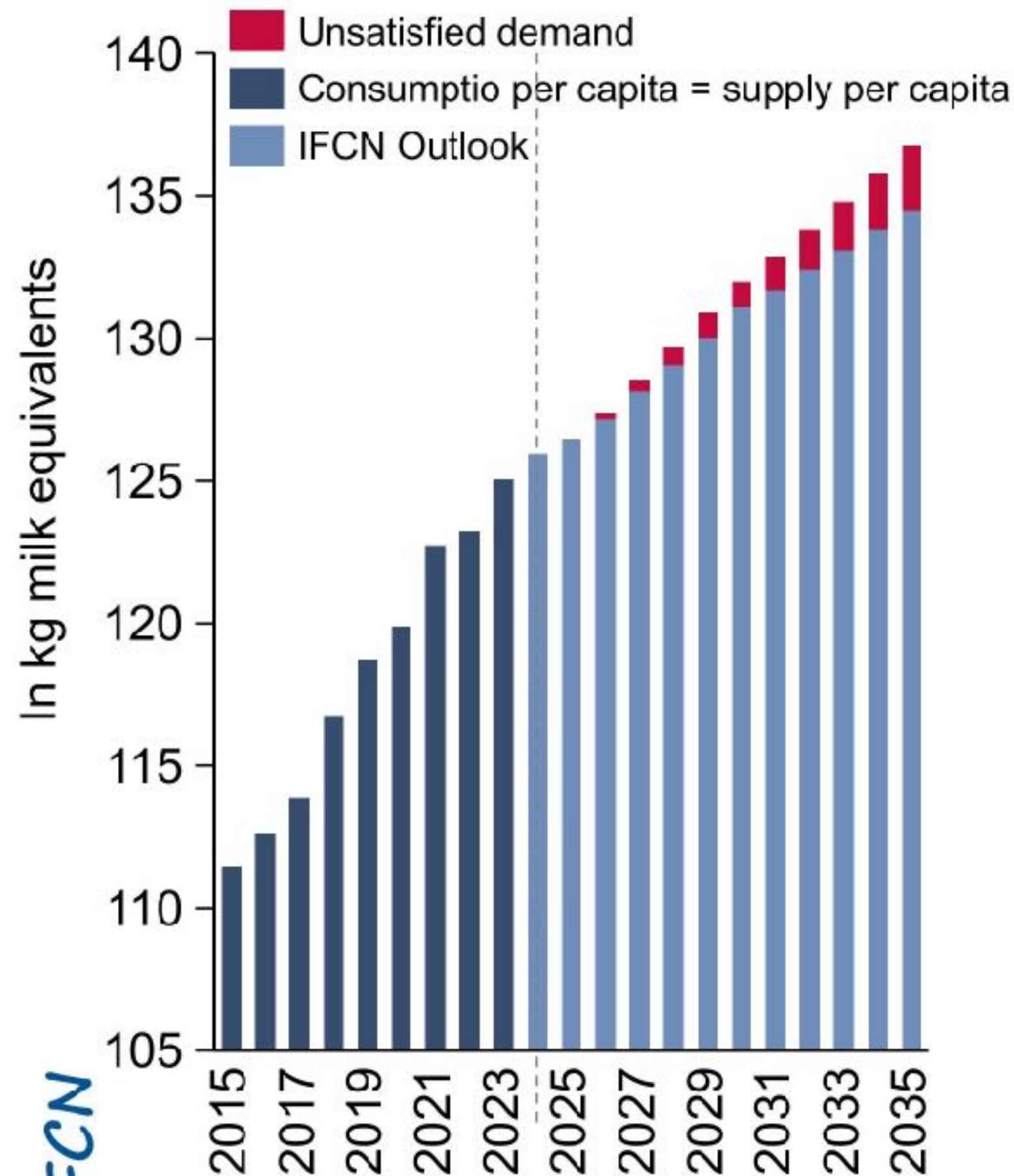
Milk surplus and deficit in 2035



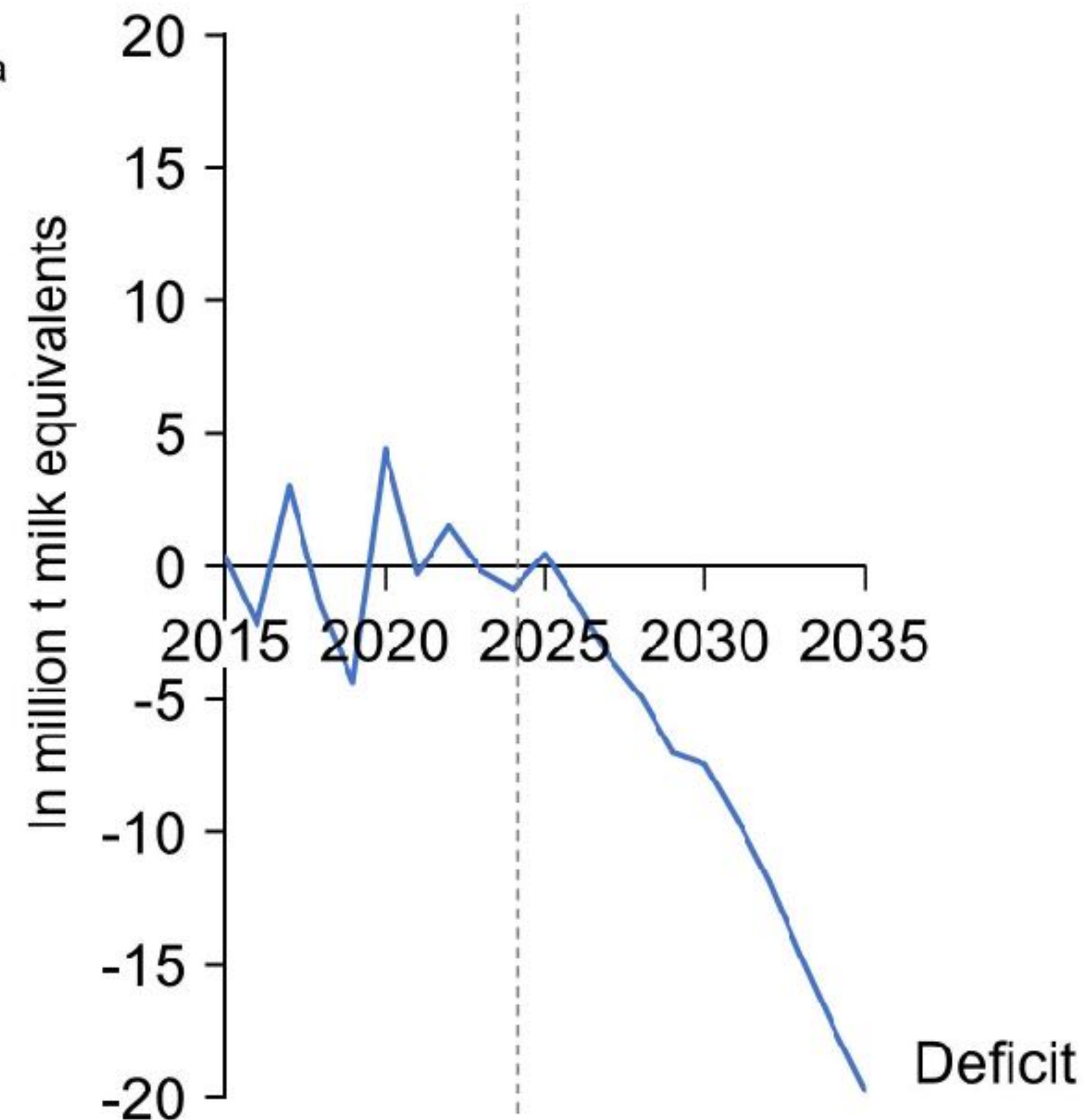
The world is projected to run out of basic dairy products

The hidden signal: Unsatisfied demand as a symptom of supply-side constraints

World milk Production



Milk supply and demand



Current scenario considered

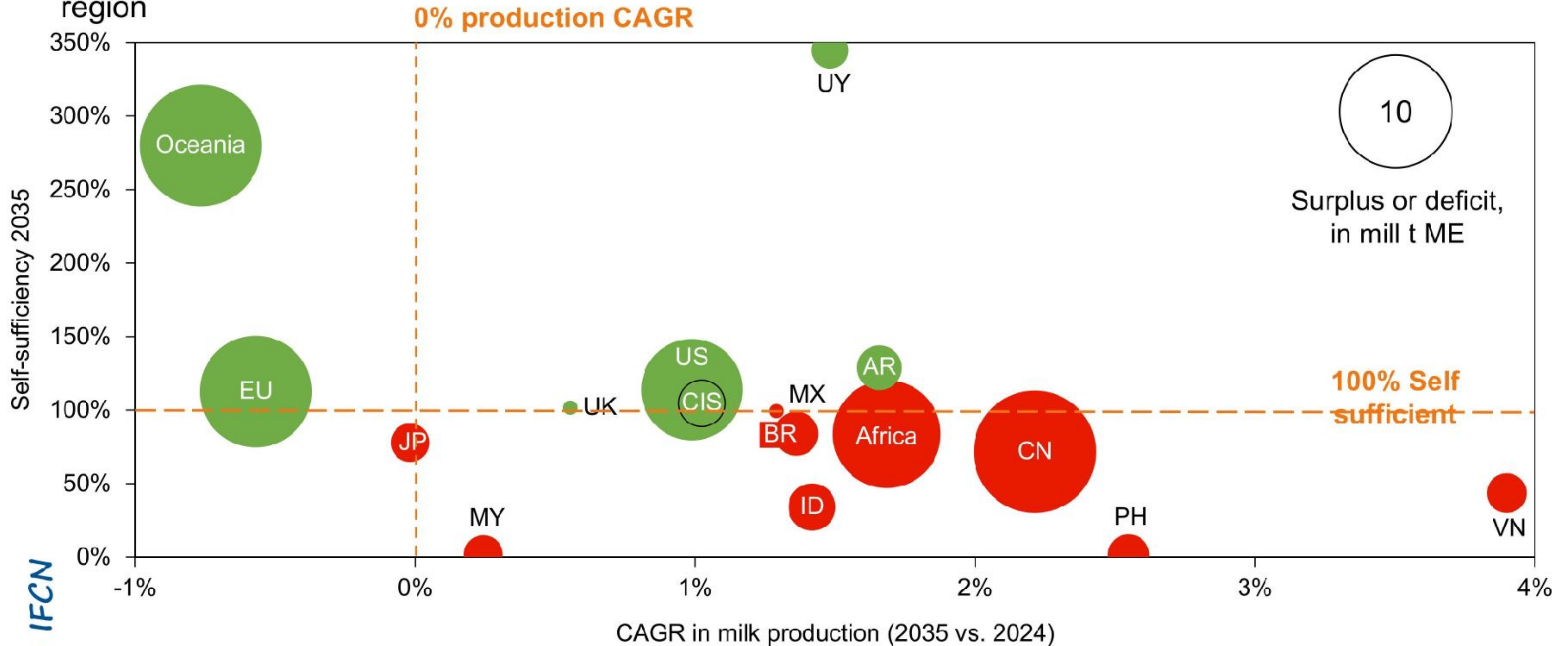
In the IFCN Long-term Dairy Outlook, we allow for supply–demand gaps to show where growth is constrained. The projected global deficit reflects demand that cannot be met under current conditions.

New scenario considered for world

In the left chart, a scenario output is shown when supply equals demand. On a global level, this would mean significantly less dairy demand.

The dairy gap: growing appetite meets limited self-supply and results in increasing imports

The balance between production growth and self-sufficiency defines future dairy trade needs per region



Trends



China

Chinese car, 2005



Chinese car, 2005



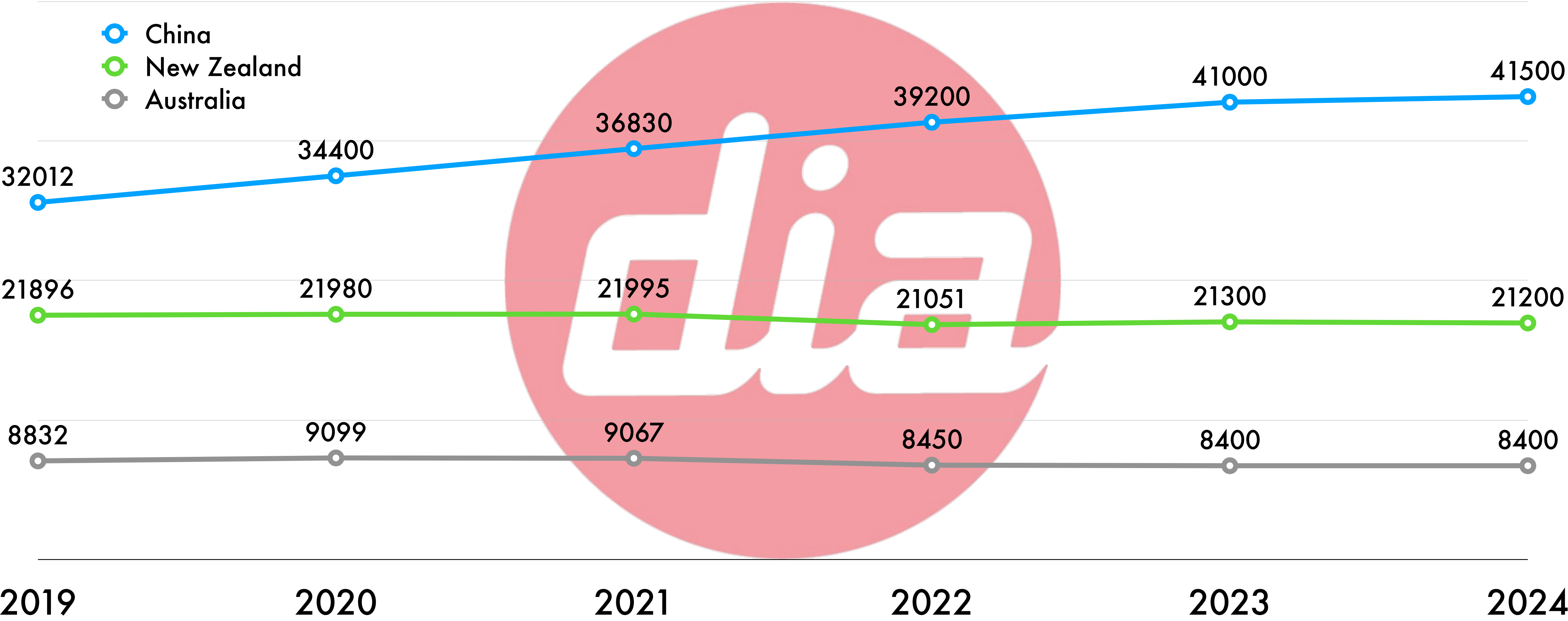
Chinese car, 2024



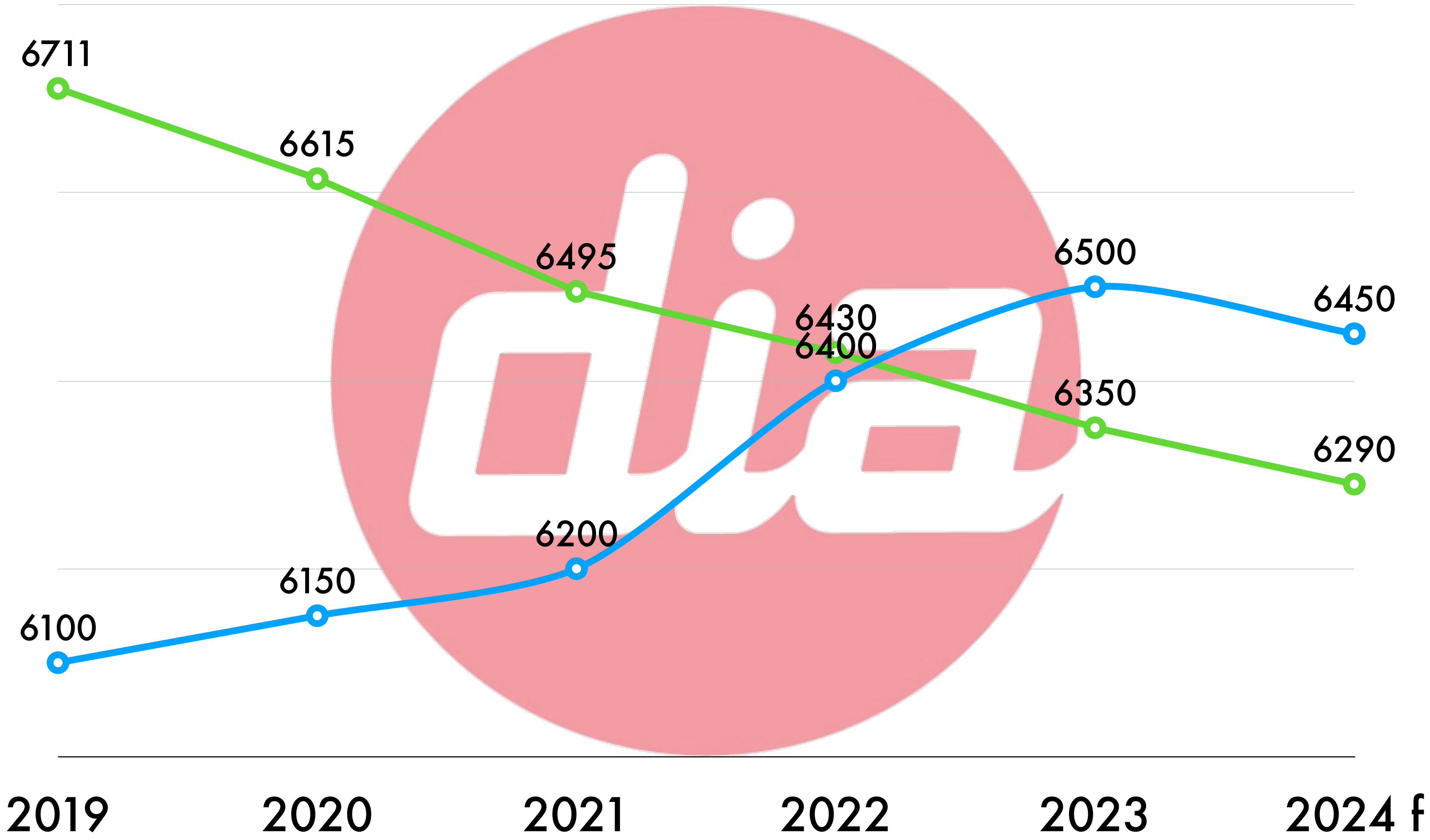
Chinese car, 2024



Chinese milk production



Number of cows

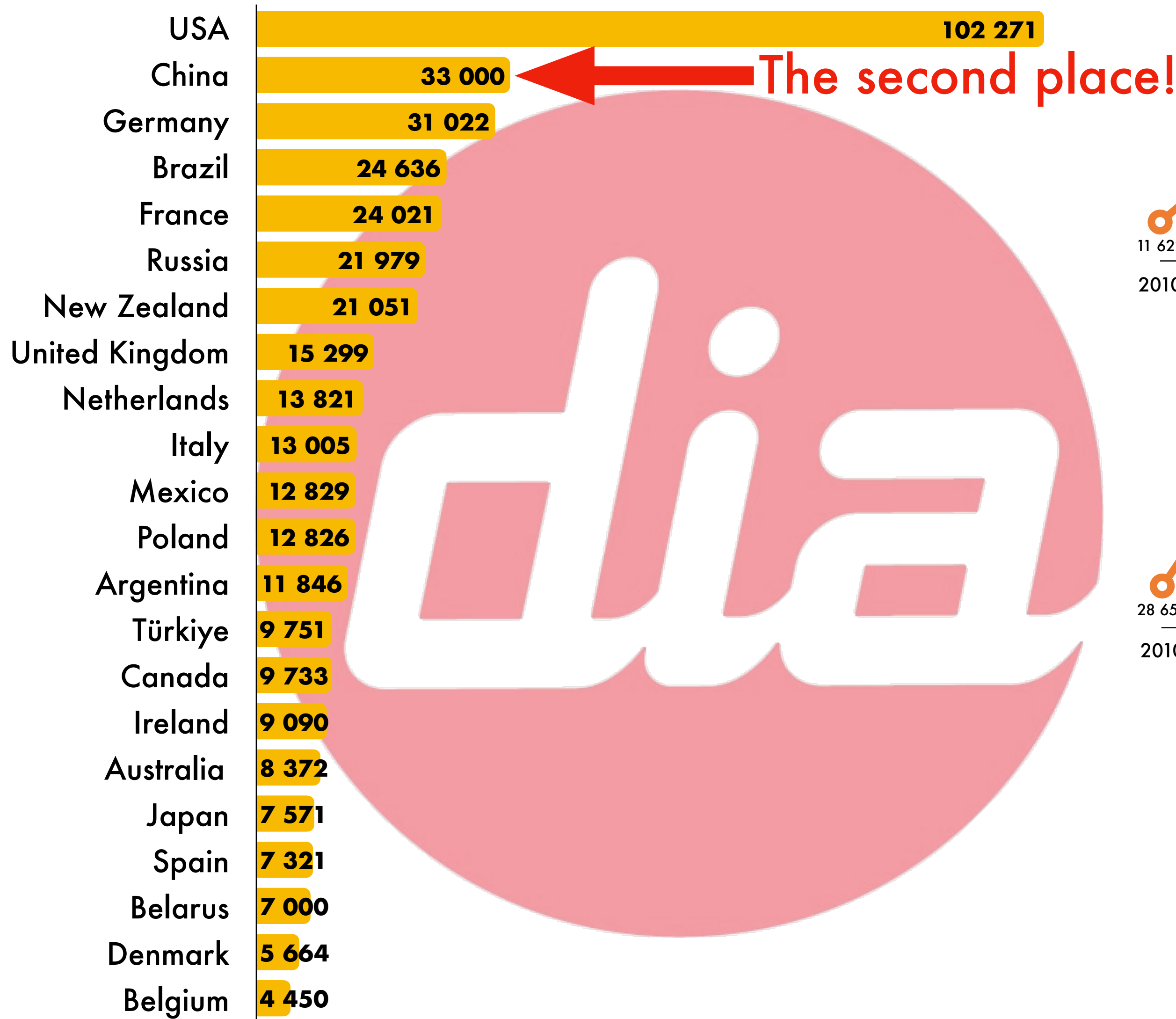


The biggest dairy companies

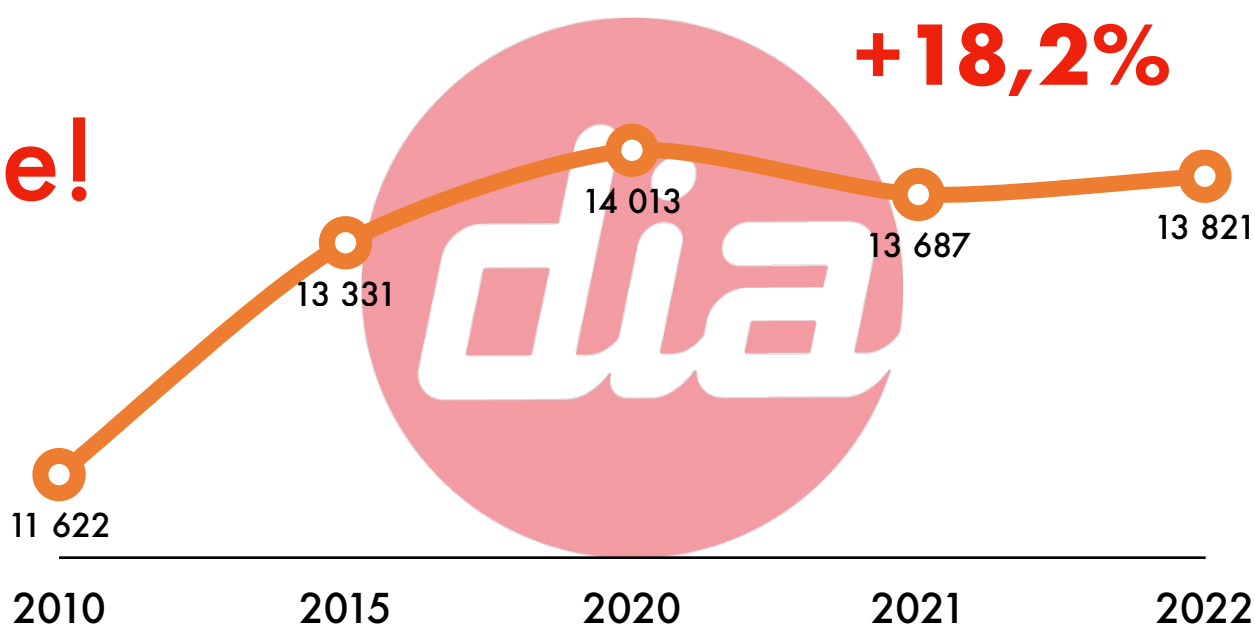
Company	Number of Farms	Herd	Number of milking cows
Youran Dairy	85	539 400	253 633
China Modern	42	418 496	204 086
China Shengmu	33	139 897	63 158
AustAsia	11	124 269	111 424
TOTAL	171	1 222 062	632 301

Chinese milk processing

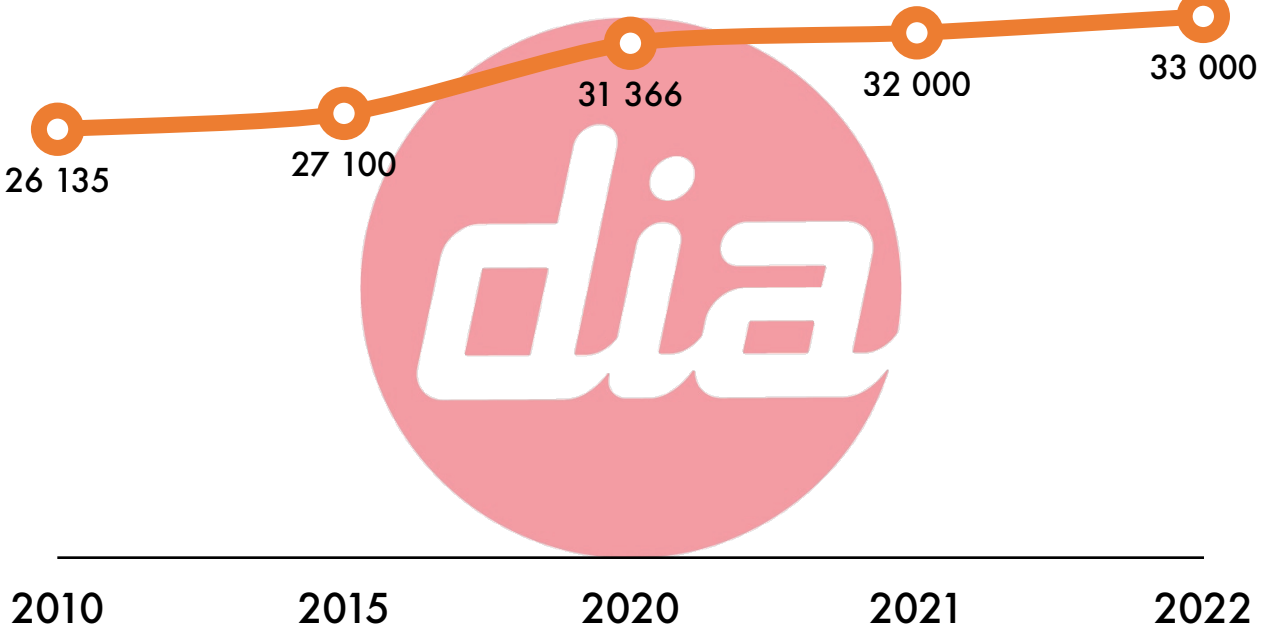
The biggest milk processors



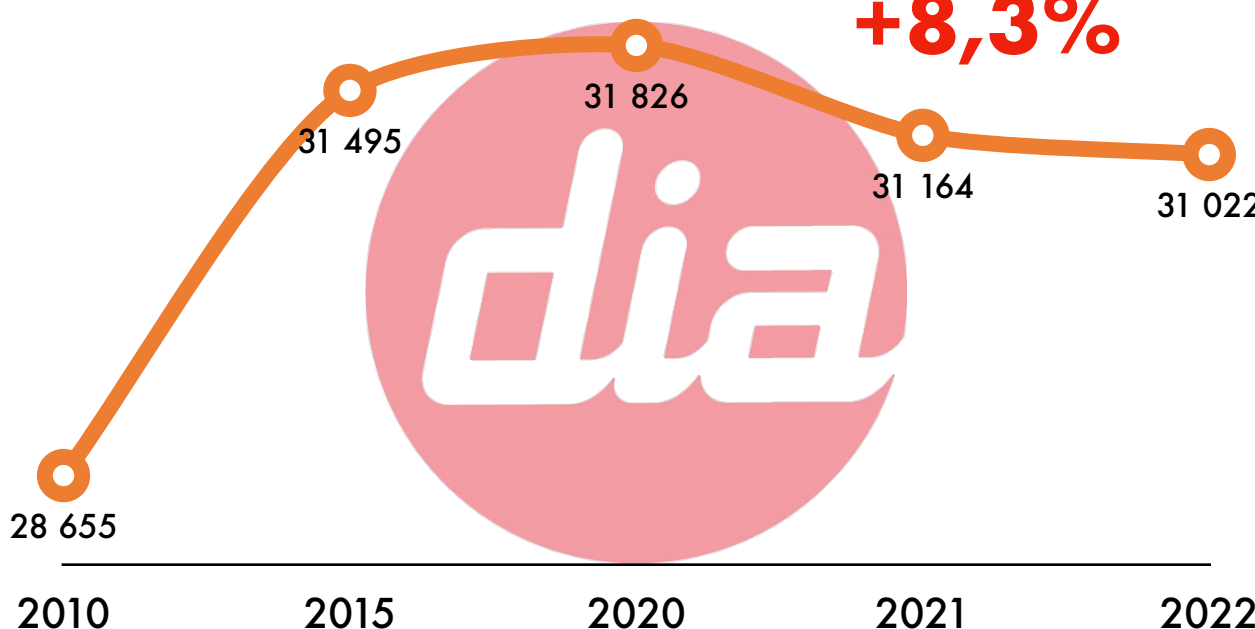
Netherlands



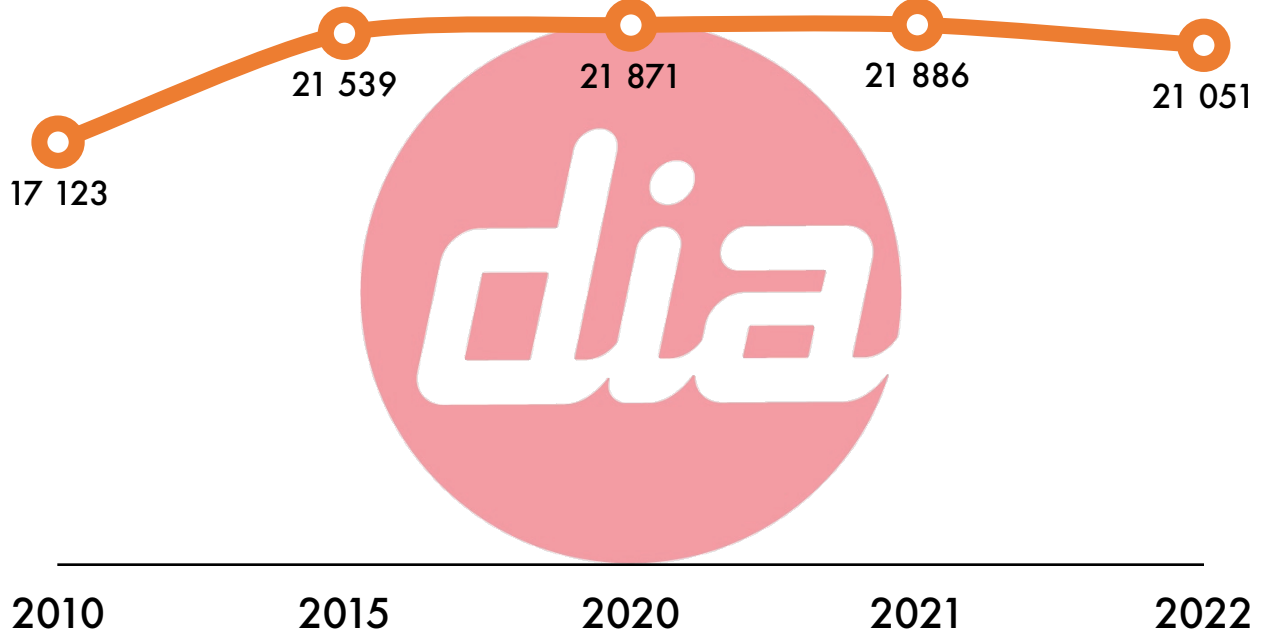
China



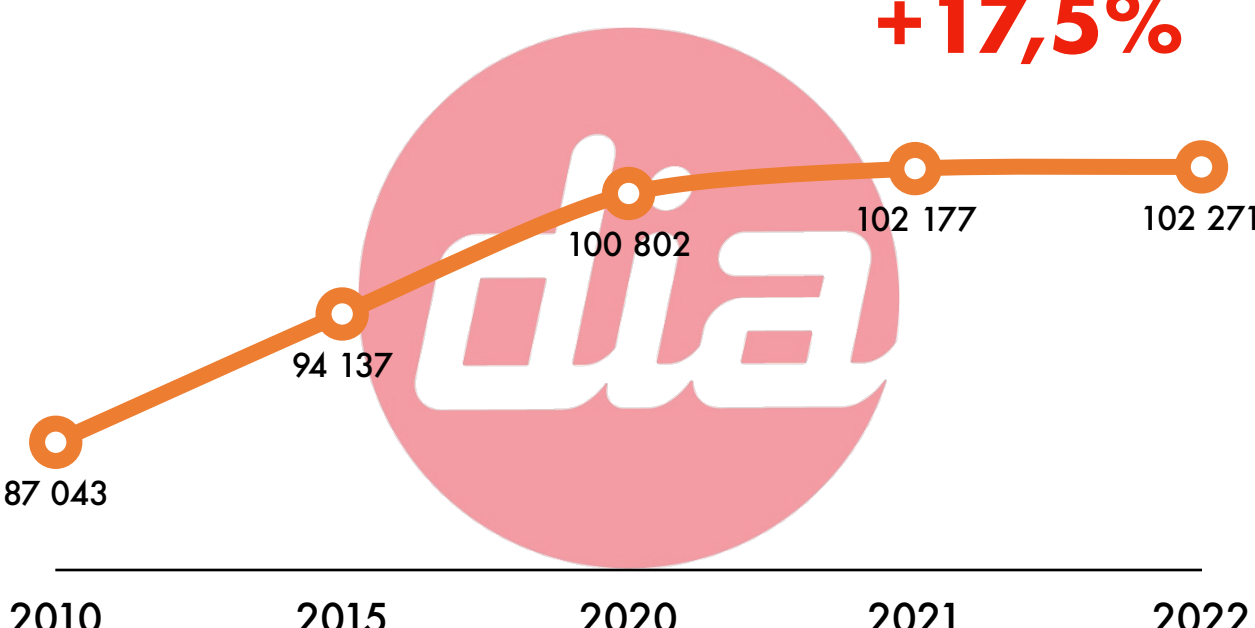
Germany



NZ



US



China's 2025 targets

-  Raw milk production: 41 million mt. (done)
-  Further reduce feed cost
-  >75% large-scale farm with more than 100 cows.
-  Yield per cow: 9mt/year
-  Improve cattle breeding capacity
-  Support dairy enterprises to build their own farms
-  Dairy farmers & enterprises cross shareholding



Ukraine

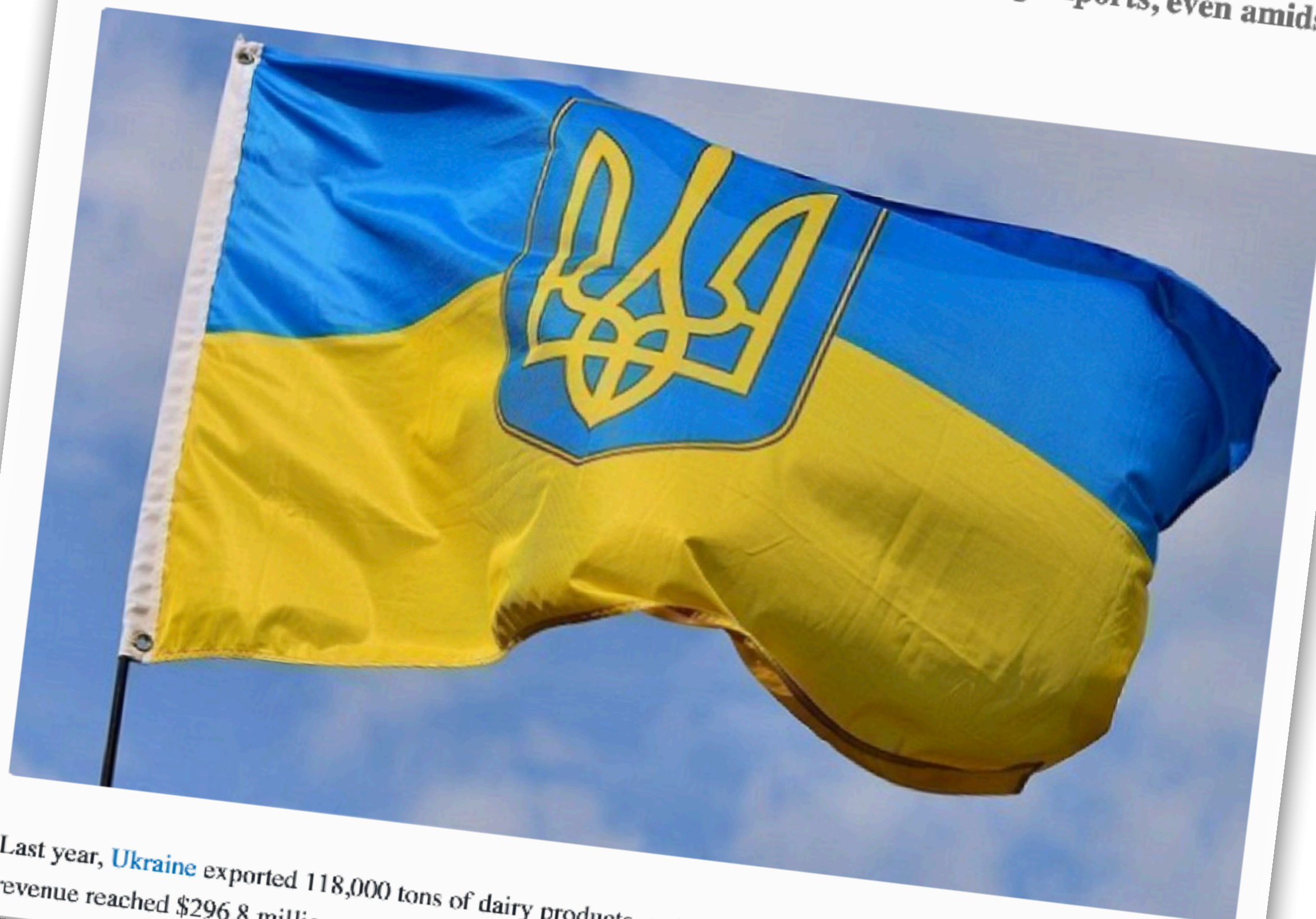
Ukraine's Dairy Export Boom Amidst Conflict

📍 Ukraine 09.06.2025

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Ukraine has significantly increased its dairy exports, surpassing imports, even amidst the challenges of war.



Last year, [Ukraine](#) exported 118,000 tons of dairy products, outperforming imports by nearly 100%. The export revenue reached \$296.8 million, a 16% increase from 2023 and a 20% rise from 2021.

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