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Policy Brief

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Understanding Consumer Segmentation to Modernize Central Asia's Dried Fruits and Nuts Market

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Key message

Consumers of dried fruits and nuts in Central Asia are not a homogeneous market: they differ substantially in their preferences for product origin, health attributes, certification, sustainability, convenience, and purchasing channels. Six distinct consumer segments identified across Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan reveal important differences both within and across countries. Producers, food-processing SMEs, and policymakers can use these insights to better align product development, marketing, certification, and market-support strategies with the needs of different consumer groups.

What is the issue?

Central Asia is an important producer of dried fruits and nuts, yet producers and food-processing SMEs face challenges in capturing higher-value market opportunities. Consumer preferences are becoming increasingly diverse, with different groups placing different importance on traditional attributes such as taste and local origin, as well as food safety, health benefits, sustainability, certification, convenience, and purchasing channels. However, limited market intelligence on these differences makes it difficult for producers and SMEs to determine which product attributes and marketing strategies are most relevant to specific consumer groups. Better understanding of consumer segments can support more targeted product development and marketing strategies in domestic markets and provide insights for positioning products in higher-value market channels.

Research approach

This study collected consumer survey data across Kazakhstan, Kyrgyzstan, Uzbekistan, and Tajikistan, covering approximately 2,500 respondents in urban and rural regions. Statistical analysis was used to group consumers with similar preferences, motivations, and purchasing characteristics into distinct market segments and to examine how socio-demographic characteristics differ across these segments.

Key findings

Six consumer segments were identified in Central Asia:

- Ethical Consumers (34.5%) – The largest segment. They place strong emphasis on environmental and social sustainability, eco-labels, and traceability.
- Health-Focused Consumers (24.5%) – Prioritize health benefits and physical and mental well-being, while placing less importance on packaging and branding.
- Indifferent Consumers (16.8%) – Show relatively low involvement across product attributes and limited interest in certification or origin claims.
- Cultural Traditionalists (16.3%) – Prioritize taste, aroma, and local origin and tend to favor bazaars and family-oriented consumption.
- Organic Experientialists (6.2%) – Show strong preferences for organic certification, food-safety labels, and integration of dried fruits and nuts into breakfast consumption.

- Digital Innovators (1.7%) – A small, highly urban and digitally oriented segment that is price-sensitive and more inclined toward online purchasing.

Consumer segments differ across countries. Kazakhstan has the largest shares of Ethical Consumers (45.7%) and Organic Experientialists (16%), while Kyrgyzstan has the largest shares of Cultural Traditionalists (27.6%) and Indifferent Consumers (18.2%). Uzbekistan has a particularly strong Health-Focused segment (29.2%), while Tajikistan shows similar shares of Cultural Traditionalists (24.1%) and Health-Focused Consumers (24.3%), alongside lower engagement with certified and digital channels.

Socio-demographic characteristics matter. Younger and more educated consumers are more likely to belong to modern, ethical, or health-oriented segments. Urban consumers show stronger preferences for certification, digital purchasing channels, packaging, and branding. Income and household size are moderately associated with modern food preferences, while gender and employment show less consistent relationships.

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