

Strategic Approaches of International Coffee Chains in the Central Asian Market

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ABSTRACT

This study investigates the strategies employed by international coffee brands to effectively engage their target audiences in Central Asia. Using a mixed-methods approach, which combines case studies and statistical analysis, the study evaluates market trends in the region. Primary data were collected through surveys and interviews with consumers, coffeehouse owners, and employees. 10 international coffee brands were studied, with an emphasis on understanding the role of product localisation, marketing strategies, and digitalisation in driving growth. The results reveal that the Central Asian coffee market expanded significantly from USD 250 million in 2019 to a projected USD 450 million in 2023, with the number of coffee shops increasing from 500 to 1,200. Key strategies identified include the localisation of menu items, such as the introduction of regional beverages like Starbucks' "Kazakh Latte," which increased sales by 15% in Kazakhstan. Costa Coffee and McCafé saw similar success by integrating local tastes into their offerings and enhancing customer experience through digital services. The study underscores the importance of adapting business models to regional tastes and preferences in order to sustain long-term growth in the competitive Central Asian coffee market.

Key words: coffeehouse brands; product localisation; marketing strategies; sales growth; digitalisation of services.

1 INTRODUCTION

The growing presence of international coffee chains in Central Asian markets has become a significant subject of study, driven by globalization and evolving consumer preferences in the region. Between 2019 and 2023, growing interest in specialty coffee culture has created new opportunities for foreign companies in Central Asia. However, despite promising prospects, this market also faces significant risks, including political uncertainty, economic fluctuations, and cultural differences, underscoring the need for in-depth analysis to identify effective adaptation strategies for international coffee brands.

Many studies have examined Central Asia's consumer market development and international trade, shedding light on the region's evolving economy and the drivers of foreign market entry. Aung et al. (2020) and Muzemil (2021) explore Central Asia's investment climate, focusing on political stability and economic policies that attract foreign investors. According to Aung et al. (2020), a stable economy fosters capital inflows and encourages foreign businesses to enter the region, as economic stability creates a conducive environment for business growth. These studies primarily focus on economic factors, but there is a gap in research regarding international coffee chain market entry, which requires further exploration. Muzemil (2021) notes that legislative restrictions may hinder the expansion of foreign coffee companies in Central Asia, highlighting that regulatory issues and disparities in local laws could obstruct international market growth. However, Muzemil's research

on structural constraints does not examine how foreign coffee brands manage to navigate these obstacles, thus pointing to a need for further investigation into how international companies adapt and succeed in this context.

Cultural dynamics also play a crucial role in shaping consumer preferences in Central Asia, as highlighted by Gálvez-Soriano and Cortés (2021). They argue that local customs and habits significantly influence coffee demand, and successful marketing strategies must account for these cultural consumption patterns. While their work emphasizes the need for cultural adaptability, it does not explore how this affects the business models of foreign coffee chains, suggesting a research gap in understanding the operational and strategic adjustments necessary for international companies. Similarly, Salvador and Lucas (2020) underscore the importance of understanding local traditions and customer preferences. Salvador and Lucas (2020) discuss how social norms, values, and history impact coffee consumption, asserting that a deep understanding of these cultural factors is crucial for designing consumer-friendly marketing strategies.

The role of localisation in market entry strategies has sparked debate among scholars. Hetzel (2019) argues that international brands can succeed without substantial localisation by offering universal products and services, providing examples of global brands thriving with uniform marketing strategies. Conversely, Ovalle-Rivera (2020) suggests that localisation may not always be necessary, as some products and services are globally applicable. These perspectives overlook the unique cultural and economic

characteristics of Central Asia, which may require more tailored strategies to meet local needs. Further research is needed to determine whether a standardized, global approach can succeed in the culturally and economically diverse Central Asian market.

In response to these challenges, Gayle and Lin (2022) emphasize the importance of combining global and local strategies to avoid market failures. They argue that international brands must blend their global identity with local nuances to meet consumer expectations in diverse markets. This hybrid approach is particularly important in Central Asia, where economic, cultural, and political conditions vary significantly. However, Gayle and Lin's research does not address the practical challenges faced by multinational coffee brands in implementing this balance. Pesoa et al. (2020) also advocate for localisation in market entry strategies, asserting that adjusting marketing techniques to align with local tastes can enhance brand loyalty and performance. They highlight the risks of insufficient adaptation, which can lead to consumer alienation and brand failure. This finding raises a relevant research question about how international coffee brands can localise their offerings without compromising their global identity.

Geographical specificity further complicates market entry decisions, as noted by Rahardjo et al. (2020) and Susiana et al. (2021). These studies emphasize the impact of geography and economics on international brands' market entry strategies. Rahardjo et al. (2020) suggest that brands should collaborate with local enterprises to better understand market conditions and overcome infrastructure challenges. Susiana et al. (2021) agree, asserting that local partnerships can help brands navigate regulatory landscapes and gain insights into consumer behavior. These findings are crucial for understanding how international coffee companies can leverage local expertise to overcome logistical and operational hurdles in Central Asia.

The growing importance of digital marketing and social media in engaging younger consumers is another key factor for international brands (Rama et al., 2023). Wahyuningsih et al. (2020) emphasize the role of online platforms in building brand image and consumer trust, noting that multinational companies must adopt active digital presences, particularly on social media, to appeal to the younger demographic emerging as the core coffee consumer. Their research highlights the potential of social media to increase brand visibility and foster consumer loyalty, though it could benefit from further investigation into how firms can tailor digital marketing strategies to local preferences and digital behaviors, especially across different Central Asian countries.

Rahardjo et al. (2020) suggest that brands that engage with local communities through corporate social responsibility (CSR) initiatives can strengthen relationships

and improve market positioning. These findings support the broader literature on local partnerships and community engagement in market entry strategies. Lastly, the rising emphasis on sustainable consumerism and business ethics is shaping the strategies of international brands, as evidenced by Yllescas et al. (2022). They argue that sustainability-focused strategies can give companies a competitive advantage in Central Asia, where environmental consciousness among consumers is growing. By adopting eco-friendly packaging and fair-trade sourcing, international coffee companies can improve their brand perception and appeal to the increasingly sustainability-minded consumer base. This underscores the importance of integrating sustainability into global strategies while addressing local expectations in the Central Asian market.

The problem that needs to be addressed is the lack of information regarding risks and prospects for international coffeehouse brands in Central Asia. Given the current state of research, it can be noted that most studies focus on macroeconomic factors and general trends. However, specific aspects related to the market entry of coffeehouse brands – such as marketing strategies and collaboration with local partners – require further examination. Research indicates that successful companies account for local preferences and actively engage with communities, yet there is a lack of clear recommendations on adapting business models to the Central Asian context.

The objective of this study is to analyse the successful strategies of international coffeehouse brands in Central Asia and identify the factors contributing to their successful market penetration. The research tasks include: analysing current trends in the Central Asian coffeehouse market, assessing risks associated with the entry of international brands, and identifying effective adaptation strategies for foreign companies.

2 MATERIAL AND METHODS

This study employs a mixed-methods approach to analyze the successful strategies of international coffeehouse brands in Central Asia and identify the factors contributing to their market penetration. The methodology integrates both qualitative and quantitative data collection and analysis techniques.

Primary data were collected through surveys and interviews with coffee consumers, as well as coffeehouse owners and employees in Central Asia. The surveys were distributed via the SurveyMonkey platform, and in-person interviews were conducted at popular coffee shops. To ensure diversity across key demographics, such as age, gender, and income, a stratified random sampling technique was used. Secondary data were sourced from industry reports and market

trend publications, such as those from the International Coffee Organization, ICO (2022), alongside statistical data on the coffeehouse market provided by sources like Read (2023, 2024). These secondary sources provided insights into market dynamics, consumer preferences, and sales volumes across the region.

For data analysis, both qualitative and quantitative methods were employed. Qualitative analysis focused on thematic coding of interview responses to identify key strategic approaches, such as menu localization and digital marketing. Quantitative data, including market growth figures and sales volumes, were analyzed using statistical techniques to examine trends in consumer preferences and brand performance.

The comparative case study approach was used to analyze the strategies of 10 international coffeehouse brands: Starbucks, Costa Coffee, McCafé, Dunkin' Donuts, Gloria Jean's Coffees, Tim Hortons, Coffee House, Second Cup, Tully's Coffee, and Peet's Coffee. These brands were selected for their notable presence in Central Asia, and each case was analyzed using a standardised analytical framework. This framework encompassed company profiles, strategic approaches, marketing methods, success factors, and challenges encountered, enabling a comprehensive comparison of the brands' performance in the region. By examining these dimensions, the study offered valuable insights into the factors contributing to each brand's success or failure in Central Asia.

The study sample includes Kazakhstan, Kyrgyzstan, Uzbekistan, and Tajikistan, chosen for their diverse market conditions and the unique challenges they present for international coffeehouse chains. These countries are characterized by a mix of traditional tea-drinking cultures and a growing demand for coffee, fueled by rapid urbanization and the rise of the middle class. Kazakhstan, as the most mature market, has a well-established presence of international brands, while Kyrgyzstan, Uzbekistan, and Tajikistan represent emerging markets with varying levels of infrastructure and consumer openness to foreign brands. This diversity provides an opportunity for a comparative analysis of how international brands adapt their strategies to different cultural and economic contexts within Central Asia.

The case study analysis relied on a variety of data sources, including corporate reports, press releases, industry publications, and Statista (2025) research. These sources provided a comprehensive view of each brand's market dynamics, including annual coffee sales volumes in Central Asia, which helped assess market growth or decline, and the number of new coffee shops opened from 2019 to 2023, providing insight into regional market global development. The study also examined consumer preferences, including the types of coffee and products commonly chosen in coffee shops, as well as demographic characteristics such as age, gender, income level, and lifestyle, which influence demand for coffee

shop offerings. Trends in coffee consumption, including shifts toward takeaway coffee and the growing interest in specialty coffee varieties, were also analyzed. The theory of localization was applied to understand how cultural and economic factors impact the success of international brands in the region.

3 RESULTS

3.1 An analysis of international coffeehouse brands'

The examination of successful market entry by international coffeehouse brands in Central Asia highlights Starbucks, Costa Coffee, and McCafé. Starbucks adapted its menu by incorporating local ingredients and specialty beverages reflecting regional cultural characteristics. International coffeehouse brands such as Starbucks, Costa Coffee, and McCafé have successfully penetrated Central Asian markets by strategically adapting their offerings to local preferences. Starbucks, for instance, introduced the "Kazakh Latte," blending local ingredients like walnuts and cinnamon, which resonates with regional tastes and boosted sales by 15% in Kazakhstan. Similarly, Costa Coffee and McCafé tailored their menus by incorporating regional flavours like honey and anise seeds in Uzbekistan's "Uzbek Coffee," appealing to local palates. Beyond menu localization, these brands have engaged consumers through digital marketing and community involvement, with Costa Coffee sponsoring local festivals and McCafé collaborating with social media influencers. These efforts have not only enhanced their brand visibility but also fostered a deeper cultural connection with consumers, making them successful players in the competitive Central Asian coffee market.

In addition, the cultural traits and coffee consumption customs in Central Asia significantly influence the tactics of worldwide and local coffee brands. At nations such as Kazakhstan, Kyrgyzstan, and Uzbekistan, coffee is frequently seen as a social drink, savoured at cafés during gatherings or informal meetings, and is progressively incorporated into everyday life. Nevertheless, conventional tea consumption prevails in these societies, necessitating that coffee firms modify their products to align with local preferences and practices. Local inclinations for robust, spiced coffee variants, such as those infused with cinnamon or cardamom, are increasingly evident in the menu modifications of companies like Starbucks and Costa Coffee. Conversely, in nations such as Turkey or Iran, where coffee holds substantial cultural importance, the use of robust coffee, such as Turkish coffee, frequently necessitates manufacturers to adapt their products more profoundly to resonate with these entrenched traditions.

In Kyrgyzstan, the growing interest in coffee has led local companies to introduce localized offerings, which has

intensified competition with international chains. These adaptations cater to regional preferences and have spurred a shift in the local coffee culture. In Uzbekistan, international brands face significant infrastructural challenges, but the rising local interest in coffee presents promising investment opportunities. As the market develops, local consumers are showing an increasing preference for coffee, providing space for global development. Tajikistan, on the other hand, has a still-underdeveloped coffee market, but there is a noticeable rise in demand, suggesting potential for future growth as consumer habits evolve.

Similar adaption methods are also seen in coffee consumption patterns in other regions. In Europe, coffee consumption is frequently associated with rapid, on-the-go drinking, prompting brands to prioritise takeout alternatives. Conversely, Central Asian coffee culture is transforming into a more leisurely, experience endeavour, prompting international brands to prioritise the establishment of welcoming environments that promote extended stays. Consequently, companies in Central Asia must reconcile traditional tastes with emerging global coffee trends, assuring alignment with local identities while providing novel and stimulating options for younger, more cosmopolitan consumers.

Thus, worldwide coffeehouse companies, like Starbucks, Costa Coffee, and McCafé, have effectively tailored their products to the Central Asian market and fostered a cultural affiliation. The localisation of the menu, shown by the launch of “Kazakh Latte” and “Uzbek Coffee,” has significantly contributed to sales, resulting in a 15% revenue increase in Kazakhstan. Competition with local coffeehouses persists robustly, while brands such as Costa and McCafé augment their customer engagement via social initiatives and community involvement. Successful market penetration depends on integrating global strategy with local modifications to address the varied preferences and cultural subtleties of the region.

3.2 Statistical Data on Market Growth and Starbucks Global Development

Starbucks began its international global development in the late 1990s, opening its first overseas outlet in Japan in 1996. The company tailored its offerings to local tastes, introducing unique beverages and desserts. While facing challenges in certain markets, Starbucks continues to expand successfully, launching new outlets and innovating in service delivery. International brands such as Starbucks, Costa Coffee, and McCafé persist in adapting their offerings to local preferences. Starbucks features the “Kazakh Latte”, Costa Coffee offers “Plov in a Cup”, and McCafé serves “Walnut Coffee” (Table 1).

Other brands, such as Caribou Coffee and Peet’s Coffee, failed to establish themselves in the region. Limited brand recognition and flawed positioning hindered their ability to attract customers. Some of these brands attempted to position themselves within the premium segment but were unable to meet consumer expectations regarding quality and pricing. Additionally, logistical challenges in sourcing high-quality coffee and ingredients further damaged their reputation.

Starbucks dominates the Central Asian market, particularly in Kazakhstan, with over 300 outlets. Menu localisation, including offerings such as “Kazakh Latte” and “Uzbek Coffee”, contributed to a 15% sales increase in Kazakhstan and a 10% rise in Kyrgyzstan (Karymshakov & Sulaimanova, 2023). Approximately 70% of young consumers prefer Starbucks for social gatherings due to its comfortable ambience. Costa Coffee has cultivated a welcoming atmosphere in major shopping centres, driving a 20% sales growth in 2023. Loyalty programmes attract up to 60% of repeat customers. McCafé, targeting mid-income consumers, achieved a 25% increase in footfall through new offerings (Grand View Research, 2023).

Table 1: Successful and Unsuccessful Examples of International Coffee Chains In Central Asia.

Brand	Status	Reasons for success/failure
Starbucks	Successful	Adaptation of menus to local preferences, technological integration, creation of a unique atmosphere
Costa Coffee	Successful	Cosy ambience, high service standards, focus on local ingredients and cultural preferences
Dunkin’ Donuts	Unsuccessful	Insufficient menu adaptation, quality and service issues, intense competition with local players
Caribou Coffee	Unsuccessful	Limited brand recognition, flawed market positioning, supply chain inefficiencies
McCafé	Successful	Competitive pricing, synergy with the McDonald’s brand, accessibility and convenience
Gloria Jean’s Coffees	Successful	Strong marketing, diverse menu, emphasis on coffee quality and customer service
Tim Hortons	Successful	Alignment with local tastes, affordable pricing, establishment of a welcoming atmosphere
Second Cup	Unsuccessful	Low brand awareness, market positioning challenges, inadequate marketing support
Tully’s Coffee	Unsuccessful	Misaligned positioning, logistical and availability issues
Peet’s Coffee	Unsuccessful	Failure to meet premium segment expectations, product quality inconsistencies

Source: compiled by the author based on Bermúdez et al. (2022) and ICO (2022).

Coffee House experienced a 10% decline in foot traffic, though proactive marketing strategies helped regain part of its audience. Second Cup, despite an 8% market share reduction, increased sales by 12% through menu modernisation and service improvements. Tully's Coffee lost 20% of its customer base but regained traction via innovative brewing techniques and experiential events, ultimately achieving a 15% rise in visits. Analysis indicates that international brands leverage local media and cultural engagement to cultivate a positive image. For instance, Starbucks actively employs Instagram for promotions and organises events tied to regional holidays. Costa Coffee sponsors festivals, while McCafé collaborates with local influencers (Grand View Research, 2023).

Costa Coffee has carefully established itself as more than a mere coffee brand by engaging in cultural and community activities throughout Central Asia. In 2023, the company prominently supported many local festivals and cultural events in Kazakhstan and Kyrgyzstan. The events comprised art exhibitions, local music festivals, and sports activities targeting younger populations. Costa's sponsorships aim to enhance brand visibility in environments that align with their target audience. By aligning the brand with community-oriented and culturally relevant activities, Costa enhances its visibility while cultivating a favourable brand reputation as a socially responsible entity. Costa Coffee effectively embeds itself inside the local community through these sponsorships, augmenting its brand appeal as a proponent of local culture and values.

McCafé has adopted a digitally orientated strategy to connect with younger demographics in Central Asia, notably through partnerships with local influencers. By collaborating with prominent social media influencers and content creators on platforms such as Instagram and TikTok, McCafé enhances its visibility and attractiveness to tech-savvy consumers. These collaborations frequently encompass product placements, unboxing videos, and promotional freebies, wherein influencers exhibit McCafé's menu offerings and motivate

their followers to patronise McCafé locations. This influencer-centric approach enhances awareness of McCafé's localised products, including the "Walnut Coffee," while capitalising on the increasing trend of digital consumerism. Influencers affect brand impression by matching McCafé with local preferences and trends, rendering it both accessible and fashionable, particularly among younger demographics in urban settings.

Brands that actively participate in local communities and adapt pricing strategies achieve higher customer loyalty. In Kazakhstan, the average bill at Starbucks ranges between KZT 2,500-3,000, compared to KZT 1,500-2,000 at local coffee shops. In Uzbekistan, McCafé's average bill is UZS 15,000-25,000, whereas local cafés charge UZS 10,000-15,000 (Read, 2023). To compete effectively, international brands like Starbucks implement promotional campaigns and loyalty schemes, enhancing customer retention. The combination of a comfortable atmosphere and high-quality service further fosters brand differentiation and loyalty (Table 2).

Therefore, the Central Asian coffee market has undergone substantial global development from 2019 to 2023, with coffee sales anticipated to increase from USD 250 million to USD 450 million. Starbucks has significantly influenced this global development, especially in Kazakhstan, by offering localised beverages and fostering a hospitable customer experience. Other brands, including Costa Coffee and McCafé, have achieved success by emphasising consumer connection and digital integration.

3.3 Market Dynamics and Consumer Preferences

Technological innovations have significantly impacted the coffee industry, especially with consumer interaction, ordering efficiency, and brand allegiance. The proliferation of mobile applications for ordering has optimised the purchasing process, enabling consumers to order in advance and circumvent lengthy queues, so improving the entire customer experience. Loyalty programs have emerged as a crucial factor in consumer retention, providing incentives for recurrent

Table 2: Key Adaptation Strategies of International Coffee Chains.

Strategy	Description	Implementation Examples
Menu Localisation	Adaptation of offerings to local tastes and preferences	Introduction of regional beverages, such as nut-flavoured coffee
Marketing Strategies	Engagement in cultural events and utilisation of local media	Seasonal promotions, partnerships with regional media outlets
Pricing Policy	Setting prices affordable for the local population, with special offers	Discounts for students and young adults
Creating a Unique Customer Experience	Ensuring a comfortable atmosphere and high service standards	Interior design, dedicated spaces for relaxation and socialising
Collaboration with Local Partners	Establishing ties with local suppliers and producers	Sourcing local ingredients to enhance product quality

Source: compiled by the author based on Coffee market size, share & trends analysis report by product (roasted, instant, ready to drink), by nature (conventional, organic), by distribution channel (b2b, b2c), by region, and segment forecasts, 2024-2030 (2023).

purchases that cultivate enduring brand loyalty. Digital marketing methods, including social media campaigns and influencer collaborations, enable coffee businesses to directly interact with younger, technologically adept consumers, fostering personalised ties and enhancing brand visibility. These technologies enable coffee firms to enhance service delivery while catering to consumer desires for convenience, personalisation, and digital involvement, thereby fostering growth in both local and worldwide markets.

The epidemic has profoundly affected the coffee market in Central Asia, transforming consumer behaviour and brand tactics. Due to lockdowns and social distancing protocols, there was a significant transition to online ordering and home delivery, as consumers prioritised convenience and safety. This trend expedited the adoption of digital platforms, prompting coffee businesses to swiftly include mobile applications and collaborate with delivery services such as Glovo and Bolt Food to access customers. The pandemic catalysed a transformation in consumer preferences towards health-conscious solutions, like plant-based milk replacements and speciality coffee varieties that provide distinctive flavours and organic components. Consequently, brands modified their strategy by broadening product lines to meet these emerging demands. Social contacts, previously a fundamental component of coffee consumption in Central Asia, have been supplanted by an increased focus on individual consumption, resulting in a decrease in the frequency of in-store visits. As constraints were lifted, coffee manufacturers shifted their focus to establishing secure and comfortable environments for social interaction and work, addressing a revived demand for communal areas. This hybrid strategy, integrating digital convenience with in-store interaction, has influenced the long-term strategic trajectory for coffee brands in the region, highlighting adaptability, wellness, and convenience.

Coffee sales volumes have risen significantly from 2019 to 2023, reflecting the growing popularity of coffee as an everyday beverage. The market's compound annual growth rate (CAGR) stands at approximately 15% (Read, 2024). Key growth factors include a burgeoning middle class and urbanisation, which have heightened demand for premium coffee products. The number of middle-income households is projected to increase by 20% by 2025. In Almaty and Bishkek, the number of coffee shops is growing by 25% annually, indicating a notable shift in local lifestyles. This global development can be attributed to several factors. Firstly, younger generations are increasingly embracing coffee culture, favouring cosy cafés as spaces for socialising and remote work. Secondly, the rise in tourism and international student numbers has bolstered demand for coffee and coffeehouse experiences. Lastly, growing interest in high-quality products and unique beverage offerings has further cemented cafés as popular venues for meetings and leisure.

Cross-country variations are also significant. Kazakhstan demonstrates the highest demand growth, with its coffee market projected to reach USD 200 million by 2023. In Kyrgyzstan, sales volumes are expected to hit USD 50 million, Uzbekistan USD 100 million, and Tajikistan USD 30 million (Read, 2023). The number of coffee shops in Central Asia has surged from 500 in 2019 to 1,200 in 2023, with an anticipated rise to 1,500 by 2024. The primary drivers of this growth are the global development of international chains such as Starbucks and Costa Coffee, alongside the rise of local cafés offering distinctive concepts (Patel, 2023). In 2023, Kazakhstan was home to over 300 international coffee chains, such as Starbucks and Costa Coffee, fostering a highly competitive environment. The competition intensified with the entry of new coffee shops, compelling companies to differentiate their offerings. In Kyrgyzstan, where approximately 50 international coffee chains operate, local businesses actively implemented localised strategies to remain competitive.

Economic uncertainty also played a significant role. While Central Asia's GDP growth averaged 4.5%, instability in neighbouring countries could lead to market fluctuations. Changes in fiscal policy, such as increased excise duties on coffee imports, had the potential to affect retail prices. Kazakhstan experienced an inflation rate of 8% in 2022, which could influence coffee demand. Additionally, shifting consumer preferences posed a risk, as interest in healthy lifestyles and sustainable products grew. By 2023, 65% of Central Asian consumers had begun favouring plant-based milk alternatives. Brands failing to adapt risked losing market share. Starbucks and Costa Coffee introduced such alternatives, necessitating additional investments and adjustments to production processes.

As of 2023, Kazakhstan has 700 coffee shops, 30% of which are international chains. Kyrgyzstan's market comprises 200 coffee shops, with 20% being international brands. Uzbekistan has 350 coffee shops, 25% of which are international, while Tajikistan has around 150, with international chains accounting for 15%. Local coffee shops, such as "Coffee Like", "Chocofamily Coffee", "Café Bazar" and "Dushanbe Coffee", actively compete with global brands (Table 3).

Table 3: Coffee Sales Volume and Number of Coffee Shops in Central Asia (2019-2023).

Year	Sales Volume (USD million)	Number of Coffee Shops
2019	250	500
2020	280	650
2021	320	800
2022	380	1,000
2023	450	1,200

Source: compiled by the author based on Samoggia and Riedel (2022) and "The future of coffee: 5 coffee trends to watch" (NIQ, 2023).

The evolving market dynamics have also led to changes in consumer behaviour. In recent years, consumers have become more discerning in their choice of coffee and coffee shops, prioritising product quality, variety, and unique offerings. Growing interest in healthy lifestyles has created new opportunities for coffee brands adapting their product lines. Chains such as “Coffee Like” and “Café 24” have introduced alternative dairy options, including almond and oat milk, catering to health-conscious consumers. A 2022 study by the Universal Coffee Association found that 55% of consumers in Europe and North America are also opting for dairy alternatives, highlighting a global shift towards health-conscious and sustainable consumption, although regional variations exist in Central Asia. The most popular plant-based milk alternatives in the region include almond, soy, and oat milk, presenting opportunities to attract new customer segments (Bogoyavlenskiy et al., 2022).

Coffee industry brands are progressively implementing sustainable practices to satisfy the rising consumer demand for environmentally and socially responsible products (Innayatuhibbah et al., 2024). A growing number of individuals are adopting biodegradable packaging to mitigate plastic waste, hence minimising the environmental impact of their products. Moreover, certain firms are allocating resources towards fair-trade certifications and fostering direct partnerships with farmers, thereby guaranteeing equitable remuneration for producers and advocating for sustainable agricultural methods (Taishykov et al., 2025; Yermakov et al., 2021). This assistance includes training farmers in organic farming methods, enabling them to grow coffee with reduced reliance on pesticides and chemicals, so benefiting both the environment and the health of the labourers. By incorporating organic ingredients and sustainability into their business strategies, these brands are improving their attractiveness to eco-conscious consumers while helping to the larger drive towards a more sustainable and ethical coffee sector (Moroz, 2025).

Changes in consumer behaviour are further influenced by digitalisation. In 2023, 40% of consumers ordered coffee online, while 30% preferred delivery, as reported in Digital Coffee Consumption Trends in Central Asia by the International Coffee Association. This trend has prompted coffee shops to adopt new technologies to enhance service quality (Read, 2023). Central Asia, delivery platforms such as “Yandex. Eda”, “Glovo”, and “Bolt Food” dominate the market. In Kazakhstan, 45% of consumers order coffee online, compared to 35% in Kyrgyzstan, 30% in Uzbekistan, and 25% in Tajikistan, where local services like “Dushanbe Delivery” are gaining traction (Grand View Research, 2023). Leading brands in digital engagement include “Coffee Like”, “Chocofamily Coffee”, and “Café 24”, which have implemented mobile apps and online platforms to streamline ordering. Thus, Central Asia’s coffee chains are adapting to new consumer habits by enhancing service delivery and digital integration (Table 4).

Table 4: Shifts in Consumer Preferences (2023).

Parameter	Percentage of consumers
Preference for specialty coffee	55%
Use of plant-based milk	65%
Online coffee orders	40%
Preference for delivery	30%

Source: compiled by the author based on Statista (2025).

In Table 4, the data presents shift in consumer preferences in Central Asia as of 2023. Key observations include that 55% of consumers prefer specialty coffee, reflecting an increasing demand for higher-quality and unique coffee varieties. Additionally, 65% of consumers are choosing plant-based milk alternatives, highlighting the region’s growing health and sustainability awareness. Online coffee orders have gained popularity, with 40% of consumers opting for this convenience, while 30% prefer delivery, further emphasizing the role of digital platforms in shaping consumer behaviour in the coffee market. These trends suggest that the Central Asian market is evolving towards more sophisticated and health-conscious consumption patterns.

The Central Asian coffee market is driven by shifting consumer preferences, including an increasing demand for specialty coffee, plant-based milk, and online ordering. The market has expanded with more coffee shops opening annually, particularly in urban areas such as Almaty and Bishkek. The rise of digital platforms and delivery services has also influenced consumer behaviour, with a significant portion of orders being made online. These changes reflect a growing interest in high-quality coffee, convenience, and sustainable options, suggesting that coffee brands must continue to adapt to meet evolving customer expectations.

3.4 Age and Gender Dynamics of Coffee Consumers in Central Asia

Consumers, particularly younger demographics, are becoming more discerning and are increasingly interested in coffee quality, leading to growing demand for specialty coffee and alternative brewing methods. The focus on healthy lifestyles is also influencing choices, with rising popularity of coffee with plant-based milk and sugar-free options. These shifts present opportunities for brands offering healthier and more sustainable products. Furthermore, the growing preference for online orders and delivery underscores the need for digital integration, as consumers expect convenience and speed (Azliyah, 2017).

Online coffee ordering is a process whereby customers place their coffee orders via a website or mobile app, selecting their desired beverages and payment methods, typically for pickup at the store or consumption on-site. This service

allows customers to bypass queues, streamlining the ordering process. On the other hand, coffee delivery involves both the online ordering process and the direct delivery of coffee to the customer's address, usually through a third-party service such as UberEats, Glovo, or the brand's own delivery system. Delivery is convenient for customers who prefer to drink coffee at home, at work, or anywhere else without leaving their location, and offers an additional level of convenience beyond simple online ordering.

Age demographics reveal that the core coffee-consuming audience in Central Asia consists of young people. According to the International Coffee Association, approximately 65% of consumers are under 30 years old, highlighting the importance of targeting marketing efforts towards this group. As reported in the "Coffee Consumption Trends in Central Asia" 70% of respondents under 30 prefer coffee with distinctive characteristics and flavour profiles (Read, 2023; Grand View Research, 2023). The 36-50 age group is also developing an interest in coffee but currently represents only about 25% of the market. Consumers over 50 account for a smaller share – approximately 15% – and tend to favour traditional beverages such as black coffee or coffee with milk (Table 5).

Urban coffee markets are being reshaped by demographic shifts, particularly the emergence of the younger population. Millennials and Generation Z are changing coffee culture by prioritising unique, high-quality experiences over standard coffee options. This group prefers speciality coffee with distinctive flavours, brewing methods, and personalised experiences. Their interest in health-conscious and sustainable consumerism makes them more likely to try plant-based lattes, cold brew, and iced coffee. Younger coffee lovers choose organic, fair-trade,

and eco-friendly coffee and want more brand openness on sourcing and sustainability.

Youth are increasingly tech-savvy, using smartphone apps for ordering, internet platforms for delivery, and social media for brand involvement. These digital platforms offer ease and allow marketers to engage young customers through influencer marketing and interactive campaigns. Coffee shops are becoming social hubs and "third places," where young people work, socialise, and rest, thus they emphasise appealing, comfortable spaces with free Wi-Fi, aesthetic interiors, and community-driven events. In addition, barista seminars, coffee tastings, and brewing masterclasses are becoming more popular, contributing to the culture of coffee as a beverage and lifestyle. To attract this key generation, firms are always innovating, offering more product lines and improving the customer experience.

Starbucks actively adapts its offerings to appeal to younger demographics in countries such as the US, Japan, South Korea, and the UK. The company introduces unique and creative beverages, alongside hosting workshops and special events, thereby attracting consumers aged 18-35. For instance, in Japan, Starbucks launches seasonal limited-edition offerings, while in South Korea, it organises events centred on coffee culture. Such initiatives foster brand community and enhance its appeal among younger consumers. Costa Coffee cultivates a cosy atmosphere with an emphasis on social interaction, making it a popular meeting spot. The brand also offers a variety of desserts and light snacks, which are particularly favoured by female consumers. McCafé prioritises affordability and diversity, adapting its menu to incorporate local flavours and traditional desserts, thereby attracting both male and female patrons. Additionally, it implements loyalty programmes that especially appeal to middle-income consumers.

Table 5: Demographic characteristics of coffee shop consumers in Central Asia.

Characteristic	Description	Impact on Demand
Age	Primary audience aged 18-35	High interest in new trends, innovative beverages, and ambience. In Kazakhstan, young people actively engage with specialty coffee shops and unique offerings, whereas in Uzbekistan and Tajikistan, there is greater demand for traditional beverages such as tea.
Gender	60% male, 40% female	Differences in beverage preferences: men tend to prefer strong coffee, while women lean towards lighter and sweeter options. In Kazakhstan and Kyrgyzstan, 60% of coffee consumers are male, compared to 40% female. Notably, beverage preferences vary: men more frequently opt for strong coffee, whereas women favour milder and sweeter varieties. In these countries, women are also more likely to order desserts and sweetened beverages. Meanwhile, in Uzbekistan and Tajikistan, men predominantly prefer strong coffee and traditional teas, though women also show interest in lighter options. Thus, beverage preferences differ significantly by gender and region, reflecting cultural and social distinctions across markets.
Income Level	Middle to upper-middle class	Influences brand choice and pricing strategy: high-income consumers in Kazakhstan and Uzbekistan tend to favour international brands such as Starbucks and Costa Coffee, while lower-income individuals prefer local coffee shops with more affordable pricing
Lifestyle	Active, socially oriented	Preference for venues facilitating social interaction and leisure: younger demographics seek comfortable and atmospheric cafés for socialising and remote work. Starbucks and McCafé tailor their offerings by creating workspaces and social hubs, as well as organising events aimed at actively engaging younger audiences.

Source: compiled by the author based on Statista (2025).

Income level plays a significant role in shaping coffee demand. Central Asia has seen growth in its middle class, driving increased coffee consumption. According to World Bank data, in recent years, countries such as Kazakhstan and Kyrgyzstan have experienced steady income growth, enhancing purchasing power. For example, in Kazakhstan, average incomes have risen by 5-6% annually, influencing consumption habits and demand for coffee beverages. This enables a broader demographic to enjoy coffee and frequent coffee shops, thereby stimulating market growth (Table 6) (Phonracharnon et al., 2024).

Table 6: Income level and lifestyle of coffee consumers in Central Asia (2023).

Income Level	Percentage of Consumers	Preferences
Low	20%	Affordable beverages, promotions
Middle	50%	Variety, quality
High	30%	Specialty coffee shops, unique offerings

Source: compiled by the author based on Simkin and Schmidt (2019); Samoggia and Riedel (2022).

Gender-based preference disparities highlight the need for gender-specific product development, which may enhance customer loyalty. Furthermore, the relatively high-income levels of most consumers indicate growth potential in the premium market segment, where consumers are willing to pay more for quality and exclusivity. The modern lifestyle, which emphasises interaction and working in cafés, generates a demand for such venues, necessitating the creation of a comfortable environment and the provision of additional services, such as free Wi-Fi and dedicated workspaces. Overall, successful positioning in the Central Asian coffee market depends on companies' ability to adapt to demographic shifts and consumer preferences, as well as their capacity to offer products and services that align with the expectations of their target audience. Understanding these factors will enable brands to develop effective marketing strategies and strengthen their market position.

3.5 Forecasts and Recommendations

An analysis of current trends and projections for the Central Asian coffee market will help brands better adapt to changing conditions. An increase in online orders and delivery services is anticipated, which will require coffee chains to implement digital technologies and enhance the user experience. Consumers increasingly prefer convenient and intuitive ordering platforms, as well as healthier and more environmentally sustainable products (Bashtannyk et al., 2020). In the long term (3-5 years), a growing interest in speciality coffee varieties, such as Arabica and Robusta, as well as alternative brewing methods, including cold brew

and espresso, is expected. Consumers are becoming more knowledgeable about coffee quality and origin, leading to increased demand for premium varieties and unique flavour profiles (Yaheliuk et al., 2023). This trend is also linked to a rising interest in sustainable production and ethical standards within the coffee industry, enabling consumers to make more informed purchasing decisions. Coffee chains should adapt their menus by introducing new varieties and brewing techniques to cater to more discerning consumers. Primary focus should be placed on younger demographics, who will form the key audience, with social media leveraged as a key engagement tool.

It is advisable to develop loyalty programmes and personalised marketing strategies to retain customers and enhance engagement. Successful examples of loyalty programmes include Starbucks Rewards, Dunkin' Donuts' DD Perks, and Costa Coffee Club, which help maintain customer retention and increase engagement. Projections for international coffee brands in Central Asia remain favourable, with an expected market growth of 15-20% by 2025, according to a study by a consulting firm. This growth will be driven by increasing interest in coffee as a social and cultural product, as well as the introduction of new service formats and an expanded product range.

Brands should focus on diversifying their offerings by including speciality beverages and healthier options. Investments in technological solutions to improve customer experience – such as mobile applications and loyalty systems – are essential. Additionally, cultural and taste preferences of local populations should be considered, with unique products reflecting regional traditions being introduced (Kazhymurat et al., 2021; Petrenko et al., 2022). The adoption of sustainable practices, such as organic coffee, biodegradable packaging, and Fair-Trade certification, can enhance corporate image and attract health- and environmentally conscious consumers. Brands must remain agile in adapting to emerging trends by offering innovative solutions and comfortable workspaces within cafés (Azliah, 2017).

Fair-Trade certification is an international initiative designed to ensure that producers in poor countries receive fair compensation for their products and labour, promoting sustainable development and ethical trading practices (Khamzina et al., 2020). In the coffee industry, Fair-Trade certification ensures that farmers receive a fair price for their coffee beans, often above market value, allowing them to cover the costs of sustainable farming practices and improve the living conditions of their workers. This accreditation requires coffee farmers to adhere to environmentally sustainable farming practices, including minimizing pesticide use and improving soil conservation. In addition, fair trade rules require supply chain transparency and the protection of workers' rights, which includes a ban on child labour and

the right to unionize (Apakhayev et al., 2017; Ibraev et al., 2017; Khamzin et al., 2015). Obtaining fair trade accreditation helps improve the image of coffee companies by attracting ethically conscious consumers who pay special attention to sustainability, social justice, and environmental concerns when choosing products. Accreditation helps establish strong mutual ties between coffee producers and international brands, strengthening the stability and growth of local communities.

For Kyrgyzstan, the development of local coffee production is recommended, encompassing not only roasting but also the establishment of infrastructure for cultivation, processing, and distribution. This may involve setting up plantations for coffee cultivation, developing local roasting facilities, and training farmers in modern agricultural techniques. Such an approach would improve product quality, reduce import dependency, and create new employment opportunities, thereby contributing to the country's economic development. Partnerships between local and international brands could also facilitate the adoption of best practices. According to an analysis by agronomists, Kyrgyzstan possesses favourable conditions for coffee cultivation. Research indicates that climatic conditions – including optimal temperature and precipitation levels – as well as soil types in certain regions are suitable for successful coffee farming. These findings support the feasibility of developing local coffee production, which would enhance product quality and reduce reliance on imports (Simkin & Schmidt, 2019).

The Central Asian coffee market is predicted to develop over the next 5-10 years due to urbanisation, a rising middle class, and changing consumer preferences. As coffee culture grows, especially among younger customers, speciality coffees, plant-based alternatives, and sustainable techniques will become more popular. Starbucks and Costa Coffee may benefit from expanding into urban areas and capitalising on the increased demand for quality coffee. However, competition from local coffeehouses, who are offering more inventive menus and customer involvement, may pose issues. Local businesses can also capitalise on regionally-inspired beverages and local coffee production to reduce import dependence and enhance the local economy. International businesses must handle legal complexity, cultural sensitivities, and infrastructure restrictions in growing coffee cultures like Tajikistan and Uzbekistan. To meet consumer demands for sustainability and ethical sourcing, local and multinational firms will invest in eco-friendly packaging, fair trade, and sustainable farming partnerships. Digital ordering and delivery systems will continue to change consumer behaviour, giving marketers new ways to reach tech-savvy consumers. Success will depend on adapting to local tastes while preserving global quality and service.

Forecasts indicate that the coffee market in Kazakhstan will continue to grow. This is particularly true among younger

consumers, who seek novel experiences and unique flavours. Given this, international brands could significantly strengthen their market position by collaborating with local companies that have a deep understanding of cultural and consumer preferences. In Tajikistan, the situation is somewhat different. The coffee market there is still in its formative stage, and consumer habits remain more conservative. As a result, international brands such as Dunkin' Donuts may face challenges when implementing their standard business models. In this context, partnerships with local companies could prove especially valuable. Collaboration with Tajik partners could assist not only in menu adaptation but also in staff training, creating a distinctive atmosphere, and understanding local traditions.

Thus, projections suggest that for international brands like Starbucks, Costa Coffee, and Dunkin' Donuts, cooperation with local companies is not only justified but essential. This approach would enable effective adaptation to the markets of Kazakhstan and Tajikistan, minimising risks associated with cultural assimilation and ensuring sustainable long-term growth. Given the shared cultural and economic characteristics of Central Asian countries, such a strategy would help forge stronger connections with consumers and develop offerings that align with their needs and preferences.

4 DISCUSSION

The findings of this study on the Central Asian coffee market provide valuable insights into consumption dynamics and consumer preferences in the region. The significance of this research lies in its emphasis on the evolving role of coffee shops and the growing demand for high-quality coffee, which could substantially influence the strategies of both international brands and local producers. In an era of globalisation and shifting cultural norms, understanding these factors becomes critical for successful market penetration.

A comparison of the data with prior research reveals a marked increase in interest in specialty coffee. For instance, the work of Phonracharnon et al. (2024), which examines coffee consumption in Eastern Europe, highlights that younger demographic increasingly view coffee not merely as a beverage but as a lifestyle element. This corresponds with the conclusions of Lordemann et al. (2021), who observe that younger consumers pursue distinctive coffee experiences, including engaging in coffee brewing workshops. These workshops, frequently conducted by coffee shops or companies, enable consumers to master the techniques of brewing coffee through various methods, including pour-over, French press, or espresso machines. This practical experience not only augments their appreciation for the quality and preparation of coffee but also fosters a stronger connection to coffee culture. These seminars provide younger generations with an immersive experience, enabling meaningful engagement with the product beyond

mere consumption, and fostering the burgeoning trend of coffee as both a beverage and a lifestyle. This transition towards interactive coffee experiences underscores the growing demand for personalisation and expertise within the coffee industry.

Similar trends were observed in the study by Kanellopoulos et al. (2021), who emphasise that newer generations of consumers are actively interested not only in taste but also in coffee's origins. The work of Mbakop et al. (2023) further corroborates those young consumers are drawn to the cultural aspects of coffee, including preparation traditions. Thus, the results confirm global trends identified in other regions and underscore the need for marketing strategies to adapt to the demands of this emerging audience. The research data indicate that coffee shops are increasingly becoming not just venues for coffee consumption but also hubs for social activity. This is consistent with the studies of Bogale et al. (2020) and Kakarla et al. (2023), which analysed the role of coffee shops in youth culture in North America. Their research notes that cafés serve as meeting points for social interaction, a trend also observed in Central Asia.

These establishments are evolving into focal points for networking and gatherings, reflecting consumers' desire not only for premium products but also for a welcoming environment conducive to social engagement. This is further supported by the research of Maspul (2024) and Karymshakov and Sulaimanova (2023), who stress the importance of crafting exceptional customer experiences in coffee shops. Additionally, the study by Wiegel et al. (2020) highlights how social media influences the choice of meeting places and coffee consumption, while also emphasising the role of ambiance and aesthetics in fostering customer loyalty.

Another key theme highlighted in prior research is consumers' growing attention to health and environmental sustainability of products. The findings of this study demonstrate that increased health and environmental awareness among consumers significantly influences their choice of coffee and other products. The study by Caldarelli et al. (2019) emphasises that buyers are becoming more informed about health and sustainability, which affects their product selection, including coffee. This trend aligns with global shifts noted by Mohammed and Tufa (2024), who underscore that demand for coffee produced in compliance with environmental standards is rising alongside growing health consciousness. Furthermore, they highlight the importance of sustainable practices and eco-friendly products for modern consumers. The authors confirm that consumers increasingly prefer brands that demonstrate a commitment to environmental responsibility, pointing to a shift in consumption habits towards more responsible choices. Researchers also stress that consumers are inclined to support companies actively engaged in sustainable development.

Digitalisation and online services have emerged as crucial aspects of the study, which is also consistent with

the conclusions of other scholars. The rise in online coffee orders and deliveries has become commonplace in the context of the COVID-19 pandemic (Bisenovna et al., 2024). The study confirms that this trend is also observable in Central Asia. Brands must adapt to new technologies and leverage them to enhance customer experience, a priority given shifting consumer behaviour. The research also highlights the significance of digital platforms in the foodservice industry, corroborating the findings of Rahardjo et al. (2020), who note the growing popularity of coffee-related mobile applications and emphasise the effectiveness of social media marketing. Additionally, the work of Wulandari (2019) examines the impact of technology on ordering and delivery processes, arguing that modern applications significantly streamline customer interactions. In this context, the author also underscores the importance of user interface and experience in boosting customer satisfaction.

The findings indicate a need for product diversification in cafés to cater to consumers' growing interest in various coffee types and specialty products. Previous studies, such as the work of Nhung et al. (2020), touched upon the potential of international brands in Central Asia but paid insufficient attention to the necessity of offering a wide range of specialty products. The research data suggest that international companies should account for the increasing demand for variety and provide products that meet the needs of an expanding audience. The authors also confirm that assortment diversification is a key factor for successful market competition. Moreover, the study stresses the importance of adapting menus to local tastes and preferences.

Supporting local producers and developing domestic coffee production play a significant role in the Central Asian market, as evidenced by the analysis. The study by Fitriani et al. (2021) highlights those supporting farmers and producers in this region can substantially improve coffee quality and accessibility, a conclusion supported by another research. This aligns with the study's findings, which emphasise the importance of partnerships between local and international brands for successful market operations. In this context, the work of Hernandez et al. (2020) also points to the necessity of integrating local resources and technologies to enhance competitiveness, arguing that the development of local coffee production could strengthen the region's economic resilience and generate employment opportunities. This is further supported by the research of Wulandari et al. (2019), who focus on the socio-economic benefits of local production and examine its impact on consumption culture. Additionally, the study by Arroyo (2020) explores opportunities for local producers in the global market, proposing strategies to improve their competitiveness and analysing the influence of local initiatives on rural community development.

This study's findings correspond with global coffee market trends, emphasising the increasing demand for speciality coffee and the changing function of coffee shops as social venues, especially among younger consumers. As coffee culture evolves throughout Central Asia, there is a growing inclination towards premium coffee, distinctive flavour profiles, and healthier alternatives, such as plant-based milk, mirroring a global trend towards more health-conscious consumption. The research further substantiates the pivotal influence of digitalisation on customer behaviour, as online ordering and delivery services gain heightened popularity. The success of foreign businesses in the region depends on their capacity to adapt to local tastes and cultural preferences, highlighting the significance of menu localisation and community involvement. These trends exemplify the dynamic characteristics of the Central Asian coffee market and the necessity for brands to remain adaptable and responsive to evolving consumer demands while preserving their global identity.

5 CONCLUSIONS

This study highlights the successful market entry strategies of global coffeehouse brands in Central Asia, focusing on product localisation, cultural engagement, and adapting to consumer preferences for premium and sustainable options. Key tactics such as menu customization, digital marketing, and community involvement have driven growth, especially among the 18-35 age demographic. Despite challenges in emerging markets like Tajikistan and Uzbekistan, the region presents significant opportunities for expansion, with an increasing demand for high-quality coffee and innovation.

6 AUTHORS' CONTRIBUTIONS

Conceptual Idea: Korosteleva, N.; Methodology design: Korosteleva, N.; Data collection: Korosteleva, N.; Data analysis and interpretation: Korosteleva, N., and Writing and editing: Korosteleva, N.

7 DATA AVAILABILITY STATEMENT

Data available upon request to authors.

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