

Traditional and modern consumption patterns of dried fruits and nuts in Central Asia: A cross-country analysis

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1. INTRODUCTION AND PROBLEM STATEMENT

- **Global demand** for tree nuts and dried fruits grows, supported by healthy and sustainable diets.
- **In Central Asia** dried fruits and nuts are vital for nutrition and incomes:
 - Important producer, due to favorable climate and traditional practices.
 - Represent an important part of traditional food heritage.
- **Producers** face structural constraints:
 - fragmented value chains, limited access to certification, and weak market infrastructure.
- **Consumption patterns** in Central Asia are evolving:
 - Urbanization, rising incomes, global connectivity are reshaping demand toward modern attributes
- **Research gap:**
 - Limited attention to local consumer market dynamics and how socio-demographic factors shape traditional vs. modern preferences.
- **Research question:**
 - *What consumer segments exist in the Central Asian dried fruit and nut market, and how do socio-demographics shape the balance between traditional and modern food preferences?*

2. CONCEPTUAL FRAMEWORK OF RESEARCH

	Traditional Food Consumption	Modernized Food Consumption
Product	Production Degree of processing Packaging	Innovative drying Snacks Packaged
Consumer Food-related lifestyle	Ways of buying	• Bazaars • Farm markets • Small kiosks
	Quality aspects	• Not important • Certification
	Consumption context	• As a side dish • As a snack at work • Sport activities
	Purchasing motivations	• Health benefits • Credence attributes • Food safety • Environmental protection • Social support
	Cooking application	• Baking, cooking
Consumers	Socio-demographics	
	• Age • Gender • Education • Income	• Age • Gender • Education • Income

Figure 1. Conceptual Framework. Source: own construct based on literature review

3. Methodology

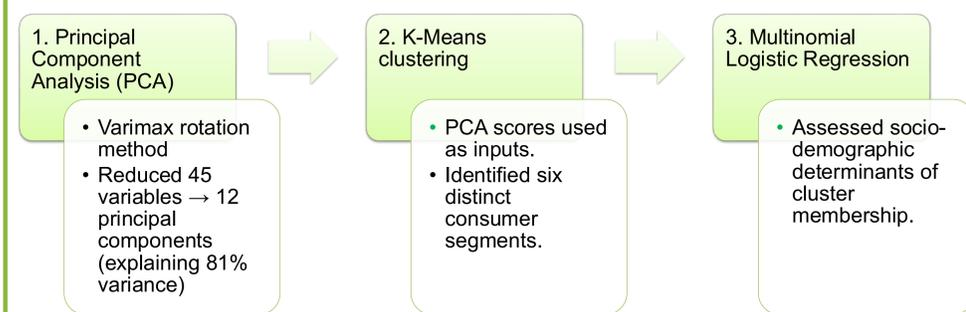
Data Collection:

- Survey conducted in Kazakhstan, Kyrgyzstan, Tajikistan, Uzbekistan.
- 2,482 respondents (urban & rural) between March 2024 – Feb 2025.

Survey instrument:

- 45 attitudinal & behavioral items on product attributes, lifestyle, and consumption contexts.
- Socio-demographic variables: gender, age, education, income, employment, household size, urban/rural.

Analytical Strategy



Source: Author's own elaboration using MapChart (www.mapchart.net, accessed 2025)

4. RESULTS

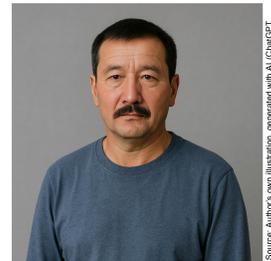
4.1. Consumer clusters

ETHICAL CONSUMERS



Share in CA - 34.5%
 Age: 25 - 45
 Gender: Mostly female
 Income: Medium
 Education: Higher
 Places: Markets, Kiosks
 Residence: Urban, peri-urb.
 Preferences: Social and environmental responsibility
Key motivations:
 • Concern for farmers' welfare, sustainable production

INDIFFERENT CONSUMERS



Share in CA - 16.8%
 Age: 45-65
 Gender: Mostly male
 Income: Low-medium
 Education: Basic
 Employment: No or retired
 Places: Groceries, bazaars
 Preferences: Bulk, unpackaged, cheap purchases
Key motivations:
 • Low interest in quality, health, or environmental impact
 • Prioritizes quantity and affordability

HEALTH-FOCUSED



Share in CA - 24.5%
 Age: Average (40-60)
 Gender: Mostly male
 Income: High
 Education: University degree
 Places: Supermarkets
 Residence: Urban
 Preferences: High-quality, safe and packaged
Key motivations:
 • Focus on physical health, food safety and chemical-free prod.

ORGANIC EXPERIENTIALISTS



Share in CA - 6.2%
 Age: Younger (25 - 40)
 Gender: Mostly female
 Income: Medium to high
 Education: Master's degree
 Employment: Employed
 Places: Organic stores
 Preferences: Organic, attractive and ethical package, mix of nut and fruits
Key motivations:
 • High interest in aroma, appearance, and organic certifications
 • High value of health qualities

CULTURAL TRADITIONALISTS



Share in CA - 16.3%
 Age: Average (45-65)
 Gender: Mostly female
 Income: Average
 Place: Local bazaars or village markets
 Residence: Rural and village
 Preferences: Prefer local dried fruits without packaging
Key motivations:
 • Prioritizes taste, aroma, local origin. Daily, family festivities

DIGITAL INNOVATORS



Share in CA - 1.7%
 Age: Young (25-35)
 Gender: Mostly male
 Income: High
 Employment: Employed
 Family: Newly married
 Education: High
 Places: Online
 Preferences: Convenience, transparency, innovatively dried
Key motivations:
 • Enjoys digitally enabled shopping and mobile payments

4.2. Cross-country variations:

Kazakhstan

- Ethical Consumers (45.7%)
- Organic Experientialists (16%)

Kyrgyzstan

- Cultural Traditionalists (27.6%)
- Ethical Consumers (26.6%)

Tajikistan

- Cultural traditionalists (24.1%)
- Health-focused consumers (24.3%)
- Lowest in certified or digital channels

Uzbekistan

- Ethical Consumers (37.29%)
- Health-Focused cluster (29.2%)

4.3. Socio-demographic predictors:

Gender:

- Women more likely in health, ethical, and traditional clusters.

Age:

- Older → Health & Ethical;
- Younger → Traditional + Organic.

8. Conclusion

Hybrid Transformation

- Central Asian dried fruit and nut markets reflect both tradition and modernity.
- Traditional use remains rooted in bazaars, home cooking, and festivities.
- Modern trends highlight health, certification, sustainability, and digital retail.

Policy & Market Implications

- Tailored strategies needed → no one-size-fits-all.
- Support traditional consumers with local branding and cultural preservation.
- Provide modern/ethical consumers with certification, labeling, and traceability.
- Expand digital access for urban youth; improve food literacy & affordability for rural and low-income groups.

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