Kazakhstan Coatings Overseas Market Analysis Report

Target Country: Kazakhstan | Main Category: Coatings | Import-Dependent Market

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Kazakhstan Coatings Key Takeaways

The Kazakhstan coatings market remains import-dependent in 2026, with domestic production covering only about 35% of demand. Architectural coatings dominate the consumption structure (55% share), while infrastructure investment and urbanization drive annual demand growth of approximately 5%. China stays firmly as the second-largest import source, though Russia maintains the largest share thanks to geographic and tariff advantages. High raw material prices, notably for titanium dioxide, combined with Tenge exchange rate volatility, are the core risks for importers.

- Market size: approx. **USD 350 million** (2025 est., carried forward to June 2026)
- Import dependency: **62%–65%**, domestic output ~35,000 tonnes/year
- China's share of Kazakhstan's coatings imports: approx. **22%**, behind Russia (~38%)

Sources: Kazakhstan National Bureau of Statistics (KazStat), UN Comtrade, Q4 2025 data; World Bank Kazakhstan Economic Update, April 2026

Supply and Demand Fundamentals

Kazakhstan's annual apparent coatings consumption is approximately 95,000–100,000 tonnes, while domestic production is about 35,000 tonnes; the deficit is filled by imports. Architectural coatings are the largest segment, accounting for 55% of total volume; industrial coatings represent 28%; automotive refinish and wood coatings together make up 17%. The two major urban agglomerations—Astana and Almaty—contribute over 60% of consumption.

Indicator	2024	2025 Est.	YoY
Domestic Production (10,000 tonnes)	3.3	3.5	▲6.1%
Imports (10,000 tonnes)	6.4	6.7	▲4.7%
Apparent Consumption (10,000 tonnes)	9.5	10.0	▲5.3%

Sources: KazStat Industrial Output Report, 2025; UN Comtrade HS32 coatings import data, 2025

China Market Status

China's coatings industry operated at 68%–72% capacity utilization in the first half of 2026, with ample production capacity. The domestic average price of titanium dioxide (rutile grade) is approximately RMB 15,200/tonne, down 2% from the beginning of the year but still at a historically medium-high level. China's coatings exports to Central Asia continue to increase, with Kazakhstan being the largest destination in the region.

- Titanium dioxide (rutile) price: **RMB 15,200/tonne** (June 2026, Sunsirs)

- China coatings industry operating rate: approx. **70%**, sufficient capacity utilization
- China's coatings exports to Kazakhstan: approx. **18,000 tonnes** in 2025, up 11% YoY (Customs data)

Sources: Sunsirs titanium dioxide price monitoring, June 2026; Longzhong Info coatings weekly, 2nd week of June 2026; China General Administration of Customs HS32 export statistics, 2025

Kazakhstan Market Status

Kazakhstan's coatings market is import-led; local brands like Alina Group have limited capacity. Retail prices for architectural coatings range from approximately USD 2.8 to 4.5 per liter, while industrial coatings rely on professional channels. By import source, Russia holds 38%, China 22%, Turkey 16%, and Germany & EU collectively about 15%. In 2026, the KZT/USD exchange rate has been fluctuating between 460 and 475, affecting import costs.

Import Source	Share	Main Categories
Russia	38%	Architectural coatings, industrial coatings
China	22%	Industrial coatings, automotive paints
Turkey	16%	Architectural coatings, decorative paints
Germany / EU	15%	High-end industrial coatings

Sources: UN Comtrade database, 2025 import statistics; KazStat Foreign Trade Report, Q4 2025

Product Segment Structure

Kazakhstan's coatings imports can be divided into four major categories: architectural coatings (mainly water-based/latex paints), industrial protective coatings, automotive refinish paints, and wood coatings. Architectural coatings account for the largest import volume, approximately 37,000 tonnes in 2025; industrial coatings are growing fastest, driven by maintenance demand for oil & gas pipelines and mineral processing facilities. Automotive refinish paints have the highest unit price, with CIF values reaching USD 6–9/kg.

Segment	Imports (10,000 tonnes)	Share	Trend
Architectural coatings	3.7	55%	▲Steady Growth
Industrial protective coatings	1.9	28%	▲Rapid Growth
Automotive refinish paints	0.7	10%	→Stable
Wood coatings & others	0.4	7%	→Stable

Sources: UN Comtrade HS3208-3210 disaggregated data, 2025; KazStat Consumer Goods Import Statistics, 2025

Core Finished Products Supply & Demand

Architectural coatings are the core finished product in Kazakhstan's coatings market, with annual demand of around 55,000 tonnes and domestic production of only about 20,000 tonnes, leaving a supply-demand gap of roughly 35,000 tonnes to be filled by imports. Construction of new urban areas in Astana and old-city renovation projects in Almaty continue to drive demand in 2026, with an estimated annual growth rate of 5%–6%. Industrial coatings are in strong demand in the oil & gas sector, with import volume growing by about 8% year-on-year.

- Architectural coatings supply-demand gap: approx. **35,000 tonnes/year**, import fill rate 64%
- Average architectural coatings retail price: **KZT 1,200–1,800/liter** (equivalent to USD 2.6–3.9)
- Industrial coatings import growth: **+8%** YoY in 2025, driven by oil & gas pipeline maintenance

Sources: KazStat Industrial Output and Consumption Statistics, 2025; Alina Group Annual Report (public summary), 2025

Intermediate Products & Raw Material Value

Prices of core raw materials—titanium dioxide, acrylic resin, and solvents—directly affect the cost of imported coatings. Chinese-produced titanium dioxide is around RMB 15,200/tonne; after overland transport to Almaty, the CIF cost is approximately USD 2,200–2,400/tonne. Acrylic resin ex-works China is about RMB 12,500/tonne, with an estimated CIF value for Kazakh importers of USD 1,850–2,050/tonne. Raw material costs account for roughly 45%–55% of the final coating price.

Raw Material	China Price	Kazakhstan CIF Estimate
Titanium dioxide (rutile)	RMB 15,200/tonne	USD 2,200–2,400/tonne
Acrylic resin	RMB 12,500/tonne	USD 1,850–2,050/tonne
Organic solvent (xylene)	RMB 7,800/tonne	USD 1,150–1,300/tonne

Sources: Sunsirs titanium dioxide and chemical raw material prices, June 2026; JLC Network Technology acrylic resin market monitoring, May 2026 (carried forward)

Trade & Macro Indicators

Kazakhstan's GDP grew 4.8% in 2025, while construction sector value-added rose 7.2%, providing solid support for coatings demand. China–Kazakhstan bilateral trade exceeded USD 41 billion in 2025, with coatings and related chemical products ranking among the top 20 categories in China's exports to Kazakhstan. Kazakhstan offers special economic zone tax incentives to foreign investors; localized coatings production projects may benefit from corporate income tax reductions.

Indicator	Value	Period
GDP Growth Rate	4.8%	2025
Construction Sector Growth	7.2%	2025
USD/KZT Exchange Rate	468	June 2026
China–Kazakhstan Total Trade	USD 41 billion	2025

Sources: World Bank Kazakhstan Economic Update, April 2026; China General Administration of Customs Trade Statistics, 2025; National Bank of Kazakhstan Exchange Rate Bulletin, June 2026

Risks & Opportunities

Tenge exchange rate volatility (annual amplitude can reach 15%) is the primary financial risk for importers. The Russia–Ukraine situation indirectly affects the stability of Central Asian logistics corridors. On the opportunity side, Kazakhstan's "Nurly Zhol" infrastructure program continues to generate coatings demand; trade facilitation agreements under the China–Central Asia summit framework lower tariff barriers for coatings exports; localized joint-venture production may enjoy up to 10 years of tax incentives.

> ⚠ **Risk Alert:** The USD/KZT exchange rate is expected to fluctuate within 460–490 in 2026; importers should hedge currency exposure. Lower-priced Russian coatings could further expand market share in Kazakhstan if the ruble weakens, squeezing price margins for Chinese products.

- FX Risk KZT annual fluctuation 15%, recommend CNY settlement pilot
- Policy Opportunity Coatings projects in SEZs enjoy corporate income tax reduced to 0%
- Infrastructure Dividend "Nurly Zhol" program allocates approx. USD 4.5 billion in 2026

Sources: National Bank of Kazakhstan Financial Stability Report, Q1 2026; Ministry of Commerce of China Central Asia Economic & Trade Brief, May 2026; KAZAKH INVEST, 2026

Data Sources Summary

National Bureau of Statistics of Kazakhstan (KazStat) — Industrial output, consumer statistics, foreign trade reports

UN Comtrade Database — Disaggregated HS32 coatings import data

China General Administration of Customs — China's coatings exports to Kazakhstan

World Bank — Kazakhstan Economic Update, GDP growth

Sunsirs — Titanium dioxide and chemical raw material price monitoring

Longzhong Info — China coatings industry operating rate and weekly market reports

JLC Network Technology — Acrylic resin market data

National Bank of Kazakhstan — Exchange rate bulletin, financial stability report

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Ministry of Commerce of China — Central Asia Economic & Trade Brief