Kazakhstan Rubber and Plastics Overseas Market Analysis Report

Focused on Rubber & Plastics Categories · Cross-Border Trade Decision Reference

Target Country: Kazakhstan | Main Category: Rubber & Plastics | Report Date: June 22, 2026

Kazakhstan Rubber & Plastics Key Conclusions

Kazakhstan's rubber and plastics market is highly dependent on imports, with China firmly holding the top supplier position at over 60%. International crude oil prices fluctuated within a range in H1 2026, driving moderate volatility in PP/PE raw material costs. Construction industry pipe demand is growing strongly, but Tenge exchange rate risks and local production capacity gaps remain core constraints.

- 2025 Kazakhstan total plastic product imports: approx. **USD 1.23 billion**, China's share: **62%**
- 2026 Q1 Kazakhstan construction sector value added YoY: **+5.8%**, driving pipe demand
- Tenge to USD exchange rate June 2026: approx. **460-465** range, exchange rate risk persists

Source: Kazakhstan Bureau of National Statistics, China Customs, World Bank; June 2026

Supply-Demand Fundamentals

Kazakhstan's annual consumption of rubber and plastic products is approximately 680,000 tons, with local production meeting only about 25% of demand. Plastic pipes, packaging films, and construction profiles are the three major consumption segments. Import dependency reaches as high as 75%, with the supply-demand gap filled by sources from China, Russia, and Uzbekistan.

Indicator	2024	2025	YoY Change
Local Production (10k tons)	16.2	17.0	+4.9%
Import Volume (10k tons)	49.5	51.8	+4.6%
Apparent Consumption (10k tons)	65.7	68.8	+4.7%
Import Dependency	75.4%	75.3%	Largely Flat

Source: Kazakhstan Bureau of National Statistics trade data, industry estimates; Updated April 2026

China Market Status

In June 2026, mainstream PP raffia grade quotations in China remained stable, with East China at approximately 7,550 RMB/ton; the PE market edged slightly higher supported by the maintenance season. The overall operating rate of the rubber and plastics industry remained at a moderately high level, with steadily increasing orders for exports to Central Asia.

- PP Raffia (East China) average price: **7,550 RMB/ton** (June 2026)
- PE LLDPE (North China) average price: **8,320 RMB/ton**, MoM +1.2%
- China plastic product exports to Kazakhstan: approx. **USD 760 million** in 2025
- Domestic PP operating rate: **78.5%**, PE operating rate: **74.2%**

Source: SCI99 (chem99.com), Oilchem (oilchem.net), China Customs; June 2026

Kazakhstan Market Status

Retail prices of rubber and plastic products in Kazakhstan are significantly impacted by import cost transmission. Terminal PE pipe prices are approximately 9,800-10,500 RMB/ton equivalent, a premium of about 20%-25% over similar Chinese products. Main import source countries are China, Russia, South Korea, and Turkey.

- PE Pipe (Almaty market) retail price: approx. **9,800-10,500 RMB/ton**
- Main import source country shares: China **62%**, Russia **18%**, South Korea **7%**
- Packaging film consumption share: **~33%**, Pipes/Profiles share: **~28%**

Source: Kazakhstan State Statistics Committee, Almaty Commodity Exchange; May 2026

Product Segmentation Structure

Rubber and plastics categories can be segmented into plastic products, rubber products, and raw materials. Plastic pipe imports grew fastest, +12% YoY in 2025; packaging films grew steadily; rubber tires are mainly heavy-duty and OTR tires, with similarly high import dependency.

Subcategory	2025 Import Value (USD 100M)	YoY Growth
Plastic Pipes & Profiles	3.8	+12.0%
Plastic Packaging Film/Bags	2.9	+6.5%
Rubber Tires	1.7	+3.2%
Plastic Raw Materials (PE/PP/PVC)	2.4	+8.1%

Source: Kazakhstan Customs Statistics; Q1 2026 Quarterly Report

Core Finished Product Supply & Demand

PE water supply pipes (HDPE) are a core demand product in Kazakhstan's construction market. Imports were approximately 92,000 tons in 2025, with the gap continuing to widen. Only one medium-sized pipe factory in the Atyrau region produces stably locally, with an annual capacity of approximately 25,000 tons, far from meeting demand.

- PE pipe import volume: **92,000 tons** (2025), YoY +14%
- Local pipe capacity utilization rate: approx. **72%**, constrained by raw material supply
- Inventory turnover days: importer inventory approx. **35-42 days**, within reasonable range

Source: Kazakhstan Ministry of Industry and Infrastructure Development report; March 2026

Intermediate Goods & Raw Material Value

Raw material costs account for approximately 65%-75% of total rubber and plastic product costs. PP/PE prices in China's production areas directly determine Kazakhstan's import cost benchmark. In June 2026, transport + tariff costs for PE from China to Almaty added approximately 8%-10%.

Raw Material Type	China Production Area Price (RMB/ton)	Kazakhstan CIF Estimate (USD/ton)
PP Raffia	7,550	~1,120-1,160
PE LLDPE	8,320	~1,230-1,280
PVC SG-5	6,180	~920-960
Synthetic Rubber (SBR)	13,800	~1,980-2,050

Source: SCI99, Oilchem; June 2026 (CIF prices are estimated reference values)

Trade & Macro Indicators

Kazakhstan's GDP growth rate was approximately 4.2% in 2025, maintaining a robust 4.0% in Q1 2026. China-Kazakhstan bilateral trade exceeded USD 41 billion in 2025, with rubber and plastic products being an important category. Kazakhstan offers a 50% income tax reduction for 5 years for foreign-invested manufacturing.

- 2025 GDP growth rate: **4.2%**; 2026 Q1: **4.0%**
- China-Kazakhstan bilateral trade (2025): approx. **USD 41.2 billion**
- Tenge to USD (June 2026): approx. **462**
- Manufacturing foreign investment incentive: **50% income tax reduction for first 5 years** (SEZ policy)

Source: World Bank, National Bank of Kazakhstan, China Ministry of Commerce; June 2026

Risks & Opportunity Windows

⚠ Risk Tenge exchange rate volatility exacerbates import cost uncertainty; competitive pressure from lower-priced Russian sources is rising.
▲ Opportunity Kazakhstan's "Nurly Zhol" infrastructure plan drives pipe demand; under the China-Kazakhstan production capacity cooperation framework, a window for localized plastic processing investment is opening.

- Geopolitical risk: indirect disruptions to regional supply chains from the Russia-Ukraine situation
- Exchange rate risk: Tenge intra-year fluctuation range up to **±8%**
- Opportunity: Kazakhstan plans to build **3 new** plastic processing industrial parks by 2027
- Bilateral cooperation: China-Kazakhstan customs mutual recognition agreement reduces clearance costs by approx. **15%**

Source: Kazakhstan Investment Committee, Economic and Commercial Office of the Chinese Embassy in Kazakhstan; May-June 2026

Data Sources Summary

Kazakhstan Bureau of National Statistics (stat.gov.kz) — Trade & Macroeconomic Data

China Customs — Rubber & Plastics Product Export Statistics

SCI99 (chem99.com) — PP/PE/PVC Price Data

Oilchem (oilchem.net) — Plastic Raw Material Market Analysis

World Bank (worldbank.org) — GDP Growth & Macro Indicators

National Bank of Kazakhstan (nationalbank.kz) — Exchange Rate Data

Kazakhstan Ministry of Industry and Infrastructure Development — Pipe Supply-Demand Report

China Ministry of Commerce — Bilateral Trade & Investment Policy

Almaty Commodity Exchange — Local Rubber & Plastic Product Quotations

Kazakhstan Investment Committee — Foreign Investment Incentive Policies