Kazakhstan Packaging Overseas Market Analysis Report

Target Country: Kazakhstan

Main Category: Packaging

□ Report Update Date: June 22, 2026

Kazakhstan Packaging Key Takeaways

Kazakhstan's packaging market is highly import-dependent, with an import dependency ratio of approximately 68% in 2025. China accounts for about 37% of its total packaging imports. The food and beverage industry is the largest demand driver, with plastic and paper packaging together representing over 75% of the market. Raw material costs are trending moderately upward in 2026, and exchange rate fluctuations pose a major risk. Import substitution and China-Kazakhstan production capacity cooperation represent key opportunity windows.

Market Size~USD 910 million Import Dependency~68% Annual Growth Rate6.5%

⚠ Key Focus: The Kazakhstan Tenge has depreciated approximately 4.2% against the RMB in H1 2026, increasing import cost pressure. It is advisable to monitor currency hedging strategies.

Source: Bureau of National Statistics of Kazakhstan, General Administration of Customs of China, Euromonitor Packaging Industry Report, June 2026

Supply and Demand Fundamentals

Total packaging consumption in Kazakhstan reached approximately 680,000 tons in 2025, while domestic production was only around 220,000 tons, resulting in a supply-demand gap of 460,000 tons that is heavily reliant on imports. Food and beverage packaging accounts for over 55% of total consumption, with industrial packaging and household/personal care packaging accounting for 25% and 12%, respectively. Consumption is projected to grow to approximately 720,000 tons in 2026.

Indicator	2024	2025	2026E
Domestic Production (10k tons)	20.5	22.0	23.5
Import Volume (10k tons)	43.2	46.0	48.5
Export Volume (10k tons)	1.8	2.0	2.2
Apparent Consumption (10k tons)	61.9	66.0	69.8

Source: Bureau of National Statistics of Kazakhstan, UN Comtrade, May 2026; 2026 figures are industry forecasts

China Market Overview

China's packaging industry overall capacity utilization rate remained around 74% in H1 2026. Plastic packaging raw material PE/PP prices increased approximately 3%-5% compared to the same period in 2025, while paper packaging raw material prices remained largely stable. Exports of packaging materials to Kazakhstan grew approximately 8.5% year-on-year, with plastic films and corrugated boxes being the main export drivers.

Industry Capacity Utilization~74% PE Average Price9,100 RMB/ton PP Average Price8,200 RMB/ton Corrugated Paper Avg. Price3,050 RMB/ton Export Growth to Kazakhstan+8.5%

Source: Longzhong Information, Shengyishe, General Administration of Customs of China, June 2026

Kazakhstan Market Overview

Import prices in Kazakhstan's packaging market rose moderately in H1 2026. CIF prices for plastic packaging increased approximately 4%-6% year-on-year, while paper packaging rose approximately 2%-3%. China maintained its position as the largest supplier, followed by Russia and Turkey in second and third place. Almaty and Astana are the primary consumption and distribution hubs.

Source Country	Import Share	Main Category	Price Trend
China	37%	Plastic packaging, cartons	+4.5%
Russia	25%	Paper packaging, metal cans	+3.2%
Turkey	11%	Flexible plastic packaging	+5.1%
Europe (Germany/Italy)	10%	High-end packaging equipment	Stable

Source: Bureau of National Statistics of Kazakhstan, KazStat Trade Data, May 2026

Product Segment Structure

Kazakhstan's packaging imports are dominated by plastic and paper packaging, which together account for approximately 78% of total imports. Plastic films and packaging bags have the highest demand, followed closely

Core Finished Product Supply & Demand

Food and beverage packaging represents the core demand segment in Kazakhstan's packaging market, with approximately 370,000 tons consumed in 2025, of which local supply only met about 30% of demand. Dairy product by corrugated boxes. Metal packaging (aluminum cans, tinplate cans) primarily serves the beverage and canned food industries, while the glass packaging segment is smaller but stable.

Product Segment	Import Share	2025 Import Volume (10k tons)	Demand Trend
Plastic packaging (films/bags/bottles)	46%	21.2	+7.5%
Paper packaging (corrugated boxes/cardboard)	32%	14.7	+5.8%
Metal packaging (aluminum/tinplate cans)	14%	6.4	+4.2%
Glass packaging (bottles/jars)	5%	2.3	+1.5%

Source: UN Comtrade, Kazakhstan Customs Statistics, April 2026

and beverage packaging (PET bottles, Tetra Pak, aluminum cans) have the largest gap, with import dependency exceeding 75%. Demand in this sector is projected to grow by 7% in 2026.

Application Sector	2025 Consumption (10k tons)	Local Supply Rate	Import Gap
Dairy packaging	10.5	28%	76,000 tons
Beverage packaging (incl. PET/aluminum cans)	13.8	22%	108,000 tons
Meat/food processing packaging	8.2	35%	53,000 tons
Industrial/HPC packaging	5.5	40%	33,000 tons

Source: Euromonitor Kazakhstan Packaging Report, Industry Interviews, May 2026

Intermediate Goods & Raw Material Value

Packaging raw material prices showed a moderate overall upward trend in H1 2026. Polyethylene and polypropylene prices were supported by higher crude oil prices, while pulp prices remained relatively stable. CIF prices for imported packaging raw materials in Kazakhstan carry an average premium of 18%-22% over Chinese domestic prices, primarily due to logistics costs and tariffs.

Raw Material	China Domestic Price	Kazakhstan CIF Estimate	Premium Rate
PE (film grade)	9,100 RMB/ton	~10,800 RMB/ton	~19%

Trade & Macro Indicators

Kazakhstan's GDP growth rate was approximately 4.8% in 2025, projected to remain at 4.5%-5.0% in 2026. Bilateral trade between China and Kazakhstan continues to grow, with packaging-related products benefiting from tariff preferences under the Eurasian Economic Union framework. Tenge exchange rate fluctuations and import tariff policy adjustments are variables requiring ongoing attention.

Indicator	Value	YoY Change
GDP Growth Rate (2025)	4.8%	Stable
China-Kazakhstan	~USD 43.8 billion	+6.2%

Raw Material	China Domestic Price	Kazakhstan CIF Estimate	Premium Rate
PP (injection grade)	8,200 RMB/ton	~9,800 RMB/ton	~20%
Corrugated paper (AA grade)	3,050 RMB/ton	~3,700 RMB/ton	~21%
Aluminum ingot (for cans)	19,200 RMB/ton	~22,800 RMB/ton	~19%

Source: Shengyishe, Longzhong

Indicator	Value	YoY Change
Bilateral Trade (2025)		
KZT/RMB Exchange Rate (2026.6)	~63.5	Depreciation 4.2%
Packaging Import Tariff (EAEU)	5%-8%	Unchanged

Source: World Bank, National Bank of Kazakhstan, General Administration of Customs of China, June 2026

Risks & Opportunity Windows

Exchange rate volatility and geopolitical uncertainty are the primary risks, with Tenge depreciation driving up import costs. On the opportunity side, the Kazakhstan government is promoting domestic manufacturing development, and packaging import substitution policies present investment opportunities. Under the China-Kazakhstan production capacity cooperation framework, there is significant space for packaging industry transfer, with food and beverage sector growth continuing to drive packaging demand.

FX Risk: Tenge Depreciation Geopolitical Risk Logistics Cost Volatility

- √ Import Substitution Policy
- √ China-Kazakhstan Capacity Cooperation
- √ Food & Beverage Growth Driver

Recommendation: Monitor investment promotion policies for the packaging industry in Kazakhstan's special economic zones, as well as the progress of Chinese-invested packaging plants in Almaty Region and Akmola Region.

Source: Ministry of Industry and Infrastructural Development of Kazakhstan, Commercial Office of the Chinese Embassy in Kazakhstan, June 2026

Data Sources Summary

- Bureau of National Statistics of Kazakhstan (KazStat) — Production, consumption, and trade data
- General Administration of Customs of China — China-Kazakhstan packaging product import/export trade data
- UN Comtrade — International packaging product trade flow data
- Longzhong Information — Polyethylene, polypropylene, and other chemical raw material prices
- Shengyishe — Plastic and paper packaging raw material spot prices
- Argus Media — International polymer and aluminum price assessments
- Euromonitor International — Kazakhstan packaging industry reports
- World Bank — Kazakhstan macroeconomic and GDP data
- National Bank of Kazakhstan — Exchange rate and monetary policy data
- Ministry of Industry and Infrastructural Development of Kazakhstan — Industrial policy and investment information

Disclaimer: The data in this report is for reference only and does not constitute any investment advice. Markets involve risk, and decisions should be made with caution. Forecast values in the report are based on currently available information and industry trend extrapolation; actual results may differ from projections. Data sources are current as of June 2026, with some data carried forward from previous periods as noted in the sources.