Kazakhstan Lubricant Overseas Market Analysis Report

Target Country: Kazakhstan

Main Category: Lubricants

Report Update Date: June 22, 2026

Kazakhstan Lubricant Core Conclusions

The annual consumption of the Kazakh lubricant market is approximately 220,000 tons, with an import dependency as high as 77%. China's share of exports to Kazakhstan has risen to about 26%, while Russia remains the largest supplier. 2026 Q2 base oil prices operated weakly, automotive lubricants dominate the consumption structure, and the expansion of local blending capacity is gradually reshaping the import landscape.

- Annual Consumption Scale: ~220,000 tons (2025)
- Import Dependence: ~77% High Dependence
- China's Export Share to KZ: ~26% (2025)
- Core Risks: Intensified Russian oil competition, exchange rate fluctuations

Sources: Kazakhstan Bureau of National Statistics, General Administration of Customs of P.R. China, Longzhong Information | Data as of June 2026

Supply and Demand Fundamentals

Kazakhstan's lubricant market exhibits a pattern of "limited local production, import-led supply". 2025 local output was approximately 50,000 tons, imports were about 170,000 tons, and total consumption was around 220,000 tons. Industrial lubricant demand is steadily growing driven by infrastructure investments, while automotive lubricants maintain rigid demand alongside increasing car ownership.

Indicator	2023	2024	2025
Domestic Output (10k tons)	4.2	4.6	5.0
Import Volume (10k tons)	15.5	16.3	17.0
Export Volume (10k tons)	0.3	0.3	0.4
Apparent Consumption (10k tons)	19.4	20.6	21.6

Sources: Kazakhstan Bureau of National Statistics, Argus Media | Full year 2025 data, cited June 2026

China Market Status

China's lubricant market operated steadily in Q2 2026, with base oil prices trending weakly. The ex-factory price range for II 150N was 5,800-6,200 RMB/ton. China's annual lubricant output is approximately 7.2 million tons, with capacity utilization maintained around 68%. Exports to Kazakhstan continued to grow, reaching approximately 45,000 tons in 2025.

- Base Oil II 150N Price: 5,800-6,200 RMB/ton ↓ **Weak**
- China Annual Lubricant Output: ~7.2 M tons (2025)
- Capacity Utilization Rate: ~68%
- Lubricant Exports to KZ: ~45,000 tons (2025) ↑ **+12% YoY**

Sources: Longzhong Information, Shengyishe, General Administration of Customs | June 2026 data, partially referencing prior values

Kazakhstan Market Status

End-user prices of lubricants in Kazakhstan are doubly influenced by import costs and the Tenge exchange rate. In Q2 2026, average retail prices for automotive engine oil were approximately 2,800-3,400 KZT/liter. Russia dominates the import sources (~48%), China's share has rapidly increased to about 26%, and European brands account for roughly 18%.

Import Source Country	2023 Share	2024 Share	2025 Share
Russia	52%	50%	48%
China	18%	22%	26%
Europe (DE/FR/IT)	20%	19%	18%
Others	10%	9%	8%

Sources: Kazakhstan Bureau of National Statistics, Kazakhstan Customs Data | 2025 full year summary, cited June 2026

Product Segmentation Structure

Automotive lubricants dominate Kazakhstan's lubricant consumption. In 2025, automotive lubricants accounted for about 62%, industrial lubricants for about 33%, and specialty oils for about 5%. Within automotive oils, engine oil is the largest subcategory, while demand for hydraulic fluids and gear oils in the industrial segment has grown significantly.

Segment Category	Consumption Share	Annual Demand (10k tons)	Trend
Automotive Engine Oil	42%	~9.1	↑ Rigid Growth
Automotive Gear/Transmission Oil	20%	~4.3	→ Stable
Industrial Hydraulic Oil	15%	~3.2	↑ Infra-driven
Industrial Gear Oil	10%	~2.2	↑ Mining Demand
Specialty Oils (Transformer, etc.)	5%	~1.1	→ Stable

Sources: Argus Media, Kazakh Industry Associations | 2025 consumption structure data, cited June 2026

Core Product Supply & Demand

Automotive engine oil (SAE 5W-40/10W-40) is the largest single product in the Kazakh market, with annual imports of about 80,000 tons. In Q2 2026, CIF landed prices (Almaty) for branded finished oils were around $1.8-$2.4/liter. Chinese brands, leveraging cost-performance advantages, are priced 8%-12% lower than Russian oils, continuously expanding their market share.

- Auto Engine Oil Annual Imports: ~80,000 tons
- CIF Landed Price (Almaty): $1.8-$2.4/Liter
- Chinese Brand Price Advantage vs RU: 8%-12% lower
- Local Blending Capacity Gap: ~120,000 tons/yr

Sources: Longzhong Information, Kazakh Market Data | 2026 Q1-Q2 data, compiled June 2026

Intermediate & Raw Material Value

Base oil is the core raw material for lubricants, accounting for 55%-65% of the finished product cost. In June 2026, the ex-factory price of Chinese Group II 150N base oil was 5,800-6,200 RMB/ton, with the Khazak CIF indicative price at approximately $720-$760/ton. Additives depend on imports, steady prices in Q2.

Raw Material / Intermediate	China Ex-Factory Price	KZ CIF Indicated Price	Trend
Group II Base Oil 150N	5,800-6,200 RMB/t	$720-$760/t	↓ Weak
Group I Base Oil SN150	4,800-5,200 RMB/t	$600-$640/t	→ Stable
Compound Additive Package	28,000-35,000 RMB/t	$3,800-$4,500/t	→ Stable

Sources: Longzhong Information, Shengyishe, Argus Media | June 2026 data, partially referencing prior values

Trade & Macro Indicators

Kazakhstan's 2025 GDP growth rate was approximately 4.2%, with the industrial added value share rising to 35%. China-Kazakhstan bilateral trade volume continued to grow, exceeding $45 billion in 2025. Lubricant import tariffs are roughly 5%-8%. Chinese goods transported via the China-Europe/Central Asia Railway Express save approximately 15-20 days in transit time compared to sea freight.

- KZ GDP Growth Rate (2025): ~4.2%
- China-KZ Bilateral Trade Vol: >$45 Billion (2025)
- Lubricant Import Tariff: 5%-8%
- USD/KZT Exchange Rate: ~1:475 (Jun 2026)

Sources: World Bank, National Bank of Kazakhstan, Ministry of Commerce of China | 2025 Full Year & June 2026 data

Risks & Opportunity Windows

Risks: Low-priced Russian lubricants continue to squeeze market share; Tenge exchange rate fluctuations impact import profits; Kazakhstan's local blending capacity expansion (expected 30,000-50,000 tons of new capacity in 2026-2027) poses substitution risks. Opportunities: Optimized China-Kazakhstan logistics corridors reduce landed costs, Chinese brand cost-performance advantages are clear, and industrial oil demand in mining and infrastructure sectors exhibits strong growth.

- ⚠ Risk: RU low-price competition, spread widening to 10%-15%
- ⚠ Risk: Tenge exchange rate fluctuating >15% annually
- ✓ Opportunity: Improved logistics lead time, landed costs down 5%-7%
- ✓ Opportunity: Mining/Infra industrial oil demand up 8%-10% YoY

Sources: Argus Media, Ministry of Industry of Kazakhstan, Commercial Office of the Chinese Embassy in Kazakhstan | Comprehensive analysis June 2026

Data Source Summary

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2. Shengyishe (Commodity Data Platform) — Base oil price monitoring, June 2026
3. General Administration of Customs of P.R. China — Lubricant import/export statistics (HS Code 2710), Full year 2025 & Q1 2026
4. Kazakhstan Bureau of National Statistics — Lubricant production, consumption & import data, 2025
5. Argus Media (International Energy Market Research) — Central Asia lubricant market report, Q2 2026
6. World Bank — Kazakhstan macroeconomic data, 2025
7. National Bank of Kazakhstan — Exchange rate data, June 2026
8. Ministry of Commerce of China / Commercial Office of the Chinese Embassy in Kazakhstan — China-Kazakh trade & investment info, 2026
9. Zhuochuang Information — China lubricant capacity & operating rate data, 2025-2026