OVERSEAS MARKET ANALYSIS REPORT

# Kazakhstan Medical Raw Materials Overseas Market Analysis Report

 Target Country: Kazakhstan  Main Category: Medical Raw Materials  Report Date: June 22, 2026

## Kazakhstan Medical Raw Materials Core Conclusion

Kazakhstan's medical raw materials market has an import dependency of about 88%, with imports of approximately USD 380 million in 2024. China is the largest supplier, accounting for around 32%. Local API capacity is limited, and the government's "2025 Pharmaceutical Industry Development Plan" promotes localization, but the short-term gap is hard to fill. Tenge exchange rate volatility and supply chain concentration are core risks.

- Import dependency: approx. 88% (2024)
- Annual medical raw material imports: approx. USD 380 million
- China's supply share: approx. 32%, the largest source
- Local API capacity coverage: under 12%, slow expansion

Sources: Kazakhstan Ministry of Health 2024 Pharmaceutical Market Report; China Customs HS2933/2941 category statistics (2024)

## Supply and Demand Fundamentals

Kazakhstan's annual medical raw material demand is around 43,000 tons, while local production is only about 5,200 tons, leaving a gap of approximately 37,800 tons to be filled by imports. Main consumption areas include antibiotic formulation production, vitamin supplements, and analgesic-antipyretic drug processing.

| Indicator | Value | YoY Change |
|---|---|---|
| Annual demand (tons) | approx. 43,000 | +4.2% |
| Local production (tons) | approx. 5,200 | +1.8% |
| Net imports (tons) | approx. 37,800 | +5.0% |
| Import dependency | approx. 88% | +1.2pct |

Sources: Kazakhstan National Bureau of Statistics annual pharmaceutical supply-demand report (2024); World Bank Kazakhstan health expenditure data

## China Market Status

In 2024, China's API output was approximately 3.2 million tons, with exports of about USD 46 billion and a capacity utilization rate of around 78%. Medical raw material exports to Kazakhstan (HS2933/2941) reached about USD 120 million, up around 11% year-on-year, with antibiotic intermediates and vitamins as the main export drivers.

- 2024 China API output: approx. 3.2 million tons
- Total exports: approx. USD 46 billion
- Capacity utilization: approx. 78% (Shandong/Zhejiang main production areas)
- Medical raw material exports to Kazakhstan: approx. USD 120 million, YoY ▲11%

Source: CCCMHPIE 2024 Annual Report; China Customs export statistics

## Kazakhstan Market Status

Kazakhstan's total pharmaceutical market is about USD 2.2 billion, of which medical raw materials and intermediates account for approximately 17%. Almaty and Astana are the two major import distribution centers, and imported raw materials mainly enter public procurement channels through the SK-Pharmacy system.

- Total pharmaceutical market: approx. USD 2.2 billion (2024)
- Medical raw material share: approx. 17%
- Main source countries: China 32%, India 26%, Europe 22%, Russia 14%, Others 6%
- Public procurement share: approx. 65% via SK-Pharmacy tenders

Sources: SK-Pharmacy Annual Report (2024); IQVIA Kazakhstan pharmaceutical market monitor (2024Q4)

## Segment Product Structure

Kazakhstan's imported medical raw materials are dominated by antibiotic intermediates, vitamin APIs, and analgesic-antipyretic APIs, which together account for 68% of the import value. Import of pharmaceutical excipients is growing steadily, with microcrystalline cellulose and magnesium stearate as the top two excipient categories.

| Segment Category | Import Share | Main Source Countries | Price Trend |
|---|---|---|---|
| Antibiotic intermediates | approx. 35% | China, India | Stable, slight increase |
| Vitamin APIs | approx. 20% | China, Europe | Slight decline |
| Analgesic-antipyretic APIs | approx. 13% | China, India | Flat |
| Pharmaceutical excipients | approx. 10% | Europe, China | Moderate increase |

Sources: Kazakhstan Customs Committee import classification statistics (2024); CCCMHPIE segment category report

## Core Product Supply and Demand

Local formulation plants have the highest demand for cephalosporin and penicillin APIs, with an annual gap of about 1,800 tons. Demand for vitamin C and paracetamol APIs is around 620 tons and 480 tons respectively, almost entirely import-dependent. Slow progress in local GMP certification constrains capacity release.

- Cephalosporin API annual gap: approx. 1,800 tons, import dependency 95%+
- Vitamin C API annual demand: approx. 620 tons, local output negligible
- Paracetamol API annual demand: approx. 480 tons
- Local GMP-compliant formulation plants: only 6, expansion plans delayed

Sources: Kazakhstan Ministry of Industry and Infrastructural Development pharmaceutical industry report (2024); SK-Pharmacy procurement data

## Intermediate and Raw Material Value

Prices of pharmaceutical intermediates from China were generally stable in 2024, with FOB prices of 6-APA (penicillin intermediate) at about USD 22–26/kg and 7-ACA (cephalosporin intermediate) at about USD 85–95/kg. Kazakhstan's CIF landed price (CIF Almaty) carries a premium of about 15–20% over FOB, mainly due to logistics and tariffs.

| Intermediate Variety | China FOB Price | Kazakhstan CIF Landed Price | Premium Rate |
|---|---|---|---|
| 6-APA | 22–26 USD/kg | approx. 28–32 USD/kg | approx. 18% |
| 7-ACA | 85–95 USD/kg | approx. 100–112 USD/kg | approx. 17% |
| Paracetamol API | 5–7 USD/kg | approx. 7–9 USD/kg | approx. 25% |

Sources: Shengyishe pharmaceutical intermediate price monitoring (Dec 2024); Almaty port customs data; prior values retained, no latest public update as of June 2026

## Trade and Macro Indicators

Kazakhstan's GDP grew by about 4.2% in 2024, with the pharmaceutical industry accounting for approximately 1.8% of GDP. The tenge traded in the 460–480 range against the USD, significantly impacting import costs. Under the Eurasian Economic Union framework, some pharmaceutical products enjoy tariff preferences.

- GDP growth: 4.2% (2024, World Bank)
- Pharmaceutical industry share of GDP: approx. 1.8%
- KZT/USD exchange rate: approx. 468 KZT per USD (2024 average)
- Import tariff on medical supplies: 0–5% (EAEU preferential framework)
- China-Kazakhstan pharmaceutical trade value: approx. USD 160 million

Sources: World Bank Kazakhstan Economic Outlook (2024); National Bank of Kazakhstan exchange rate statistics; China Customs bilateral trade data

## Risks and Opportunity Windows

Key risks include tenge volatility raising import costs and possible tightening of China's environmental output restrictions affecting API supply stability. Opportunity windows lie in Kazakhstan's accelerated pharmaceutical localization policy: Chinese companies can enter the local supply chain through technology cooperation or joint GMP workshops and benefit from tax and procurement preferences.

⚠ Risk alert: The tenge depreciated about 6% in 2024, pressuring import costs; environmental output restrictions in China may tighten antibiotic intermediate supply

- Opportunity: Pharmaceutical localization policy targets 50% local drug share by 2030
- Opportunity: China-Kazakhstan bilateral cooperation facilitates pharmaceutical investment
- Risk: Exchange rate volatility with annual swings of 10–15%
- Risk: Tighter regulation – rising GMP thresholds may eliminate small suppliers

Sources: Kazakhstan 2025-2030 Pharmaceutical Industry Development Strategy; China Ministry of Commerce Country Guide for Outward Investment (Kazakhstan 2024 Edition)

## 󰀀 Data Sources Summary

**China Customs** — HS2933/2941/3003 export statistics (2024)

**Kazakhstan National Bureau of Statistics** — Annual pharmaceutical supply-demand report (2024)

**Kazakhstan Ministry of Health** — 2024 Pharmaceutical Market Report

**CCCMHPIE** — 2024 API Industry Report

**World Bank** — Kazakhstan Economic Outlook (2024)

**SK-Pharmacy** — Annual public procurement data (2024)

**IQVIA** — Kazakhstan pharmaceutical market monitor (2024Q4)

**Shengyishe** — Pharmaceutical intermediate price monitoring (Dec 2024)

**China Ministry of Commerce** — Country Guide for Outward Investment (Kazakhstan 2024 Edition)

**National Bank of Kazakhstan** — Annual exchange rate statistics (2024)