Overseas Market Analysis Report

Kazakhstan Auto Parts Overseas Market Analysis Report

Target Country: Kazakhstan | Main Category: Auto Parts | Report Date: June 22, 2026

Key Conclusions on Kazakhstan Auto Parts

Kazakhstan's auto parts market has an import dependency of approximately **75%**, with China firmly established as the largest supplier. Since 2025, RUB exchange rate fluctuations and accelerating localization policies are reshaping the market landscape. Prices are trending moderately upward, but supply chain stability remains a concern. Chinese parts retain a significant advantage in cost-effectiveness.

- 2025 vehicle parc in Kazakhstan: approx. **5.1** million units, with ~5% annual growth
- Imported parts account for approx. **75%** market share; China's share approx. **30%**
- ⚠ Note Kazakhstan continues to increase local production subsidies

Source: Statistical Agency of Kazakhstan | GACC | World Bank | Data as of Q4 2025

Supply and Demand Fundamentals

Kazakhstan's annual auto parts demand is approximately **USD 1.8-2.2** billion. Domestic production meets only about 25% of demand, with the remainder relying on imports. Demand growth is primarily driven by an expanding vehicle parc and aging vehicle repair needs, with annual demand growth of approx. 6%-8%.

Indicator	2023	2024	2025E
Market Size (USD 100M)	17.5	19.2	21.0
Domestic Production (USD 100M)	4.2	4.6	5.1
Imports (USD 100M)	13.3	14.6	15.9
Import Dependency	76%	76%	75.7%

Source: Statistical Agency of Kazakhstan | EAEU Trade Database | 2025 industry estimates

China Market Overview

In 2024, China's total auto parts exports reached approximately **USD 95** billion, with exports to Kazakhstan at approximately **USD 580** million. Domestic parts production capacity utilization remains high; filters, brake pads, and other categories maintain competitive export pricing, and the Central Asia export corridor remains open and reliable.

- 2024 China total auto parts exports: approx. **USD 95** billion (GACC data)
- Exports to Kazakhstan: approx. **USD 580** million, YoY growth approx. ▲12%
- Domestic capacity utilization: filters approx. **78%**, brake pads approx. **82%**

Source: GACC | China Association of Automobile Manufacturers | Data as of Q1 2025

Kazakhstan Market Overview

Auto parts retail prices in Kazakhstan are significantly influenced by exchange rates and logistics costs. In 2025, RUB/KZT exchange rate fluctuations pushed up some imported parts prices, with end-user price increases of approx. 5%-8%. Chinese parts, leveraging price advantages and stable supply, continue to grow their share in the aftermarket.

- Source country shares: China approx. **30%**, Russia approx. **22%**, Japan approx. **12%**
- Consumption structure: Aftermarket repair **65%**, OEM supply **35%**
- Almaty wholesale market price index (2025 baseline=100): approx. **107.5**

Source: AKAB | Almaty Auto Parts Wholesale Market | Data as of October 2025

Product Segment Structure

Engine components, filters, and braking system parts are the three largest import segments, together accounting for approximately **48%** of total import value. The tire segment, due to heavy weight and high logistics costs, has seen faster localization progress in recent years.

Segment	Import Share	Annual Growth	Main Source
Engine Components	~20%	+8%	China, Japan
Filters	~15%	+10%	China
Braking System Parts	~13%	+7%	China, Russia
Tires	~18%	+4%	Russia, China

Source: EAEU Customs Statistics | AKAB | 2025 data

Core Finished Product Supply and Demand

Filters, brake pads, and spark plugs are the three largest finished product categories by aftermarket circulation volume. Kazakhstan has only one domestic filter factory (annual capacity approx. **3** million units), far below demand; import dependency exceeds **85%**, and the supply-demand gap continues to widen.

- Annual filter demand approx. **18** million units; domestic production approx. **2.8** million units
- Annual brake pad imports approx. **4.5** million sets; China's share approx. **40%**
- Spark plug market is nearly **100%** import-dependent; dominated by NGK (Japan) and Chinese brands

Source: Ministry of Industry and Infrastructure Development of Kazakhstan | Industry survey data | As of 2025

Intermediate Goods and Raw Material Values

Steel, rubber, and aluminum alloys are core raw materials for auto parts production. China market prices are stable, but CIF prices in Kazakhstan are approx. **12%-18%** higher due to logistics and tariffs. Raw material cost pass-through supports end-part pricing.

Raw Material	China EXW Price	Kazakhstan CIF Estimate	Cost Pass-through
Cold-rolled Steel Sheet (CNY/ton)	~4,200	~4,900	+17%
Natural Rubber (CNY/ton)	~13,500	~15,200	+13%
Aluminum Alloy (CNY/ton)	~19,800	~22,300	+12%

Source: Longzhong Info | Mysteel | Logistics provider quotations | Data as of Q3 2025

Trade and Macro Indicators

Kazakhstan's GDP grew approx. **4.5%** in 2024, with the automotive industry designated as a priority sector. China-Kazakhstan bilateral trade exceeded **USD 41** billion, with auto parts as one of the fastest-growing trade categories. The KZT exchange rate remains broadly stable, facilitating bilateral trade settlement.

- Kazakhstan 2024 GDP growth: **4.5%** (World Bank)
- 2024 China-Kazakhstan bilateral trade: approx. **USD 41** billion
- USD/KZT exchange rate: **460-480** range (2025)
- Auto industry share of manufacturing: approx. **7.2%**; government targets 10%

Source: World Bank | GACC | National Bank of Kazakhstan | Data as of 2025

Risk and Opportunity Windows

Geopolitical uncertainty and RUB exchange rate volatility are the primary external risks. On the opportunity side, Kazakhstan's localization substitution policies open a window for Chinese enterprises to establish joint ventures. Cross-border e-commerce and overseas warehouse models are rapidly lowering entry barriers for small and medium-sized parts exporters.

⚠ Risk RUB/KZT exchange rate volatility may cause short-term spikes in import costs

⚠ Risk Kazakhstan continues to increase localization subsidies; pure trading model space is shrinking

▲ Opportunity Chinese enterprises setting up parts distribution centers in Kazakhstan may enjoy tax incentives

▲ Opportunity EV parts and new energy component demand is emerging rapidly; first-mover advantage is clear

Source: Kazakhstan Investment Agency | EAEU Policy Announcements | Industry Research | 2025

Key Data Sources

- Statistical Agency of Kazakhstan — Vehicle parc, GDP data
- General Administration of Customs of China (GACC) — Auto parts import and export trade data
- World Bank — Kazakhstan macroeconomic indicators
- Association of Kazakhstan Auto Business (AKAB) — Market structure and segment data
- Eurasian Economic Union Customs Statistics Database — Regional trade flows and source country distribution
- Longzhong Info / Mysteel — China market steel, rubber, and raw material prices
- National Bank of Kazakhstan — Exchange rate and monetary policy data
- Ministry of Industry and Infrastructure Development of Kazakhstan — Domestic capacity and industrial policy