

Kazakhstan Cold Chain Equipment Overseas Market Analysis Report

Target Country: Kazakhstan

Main Category: Cold Chain Equipment

Report Update Date: June 22, 2026

Kazakhstan Cold Chain Equipment — Core Conclusions

Kazakhstan's cold chain equipment market has an import dependency exceeding **80%**, with a 2025 market size of approximately **USD 210 million**. Per capita cold storage capacity is only 0.04 m³, far below developed-country levels (0.3–0.5 m³/person). China is the largest source country, accounting for approximately **35%** of Kazakhstan's cold chain equipment imports. The market is driven by both rising meat exports and Belt and Road infrastructure investment, though tenge exchange rate volatility and Kazakhstan's localization industrial policies pose core risks.

- 2025 Kazakhstan cold chain equipment imports totaled approx. **USD 175 million**, +9% YoY
- China's cold chain equipment exports to Kazakhstan approx. **USD 68 million** (2025), +12% YoY
- Kazakhstan's total cold storage capacity approx. **720,000 tons**; per capita cold storage **0.04 m³**
- Projected 2026–2028 Kazakhstan cold chain market CAGR approx. **9%**

Sources: China General Administration of Customs 2025 Annual Trade Statistics; UN Comtrade 2025; World Bank 2025; Kazakhstan Bureau of National Statistics 2025 Report. Some monthly data through May 2026; June data uses previous values.

Supply-Demand Fundamentals

Kazakhstan's cold chain equipment demand is driven by three major segments: meat export processing, dairy cold chain distribution, and pharmaceutical temperature control. Domestic production capacity is limited, meeting only approximately **15–18%** of demand, with the remainder heavily reliant on imports. Total market demand (including equipment and services) in 2025 was approximately USD 230 million, with the supply-demand gap continuing to widen.

Indicator	2023	2024	2025 (Est.)
Domestic Output (USD Million)	28	31	34
Imports (USD Million)	148	160	175
Exports (USD Million)	5	6	7
Apparent Consumption (USD Million)	171	185	202

Sources: Kazakhstan Bureau of National Statistics 2025 Trade Yearbook; UN Comtrade 2025; industry estimates. Partial 2025 data uses previous values; no latest monthly public data available.

China Market Status

China's cold chain equipment production capacity is ample, with 2025 total industry output exceeding **RMB 520 billion** and total exports of approximately **USD 9.2 billion**. Export growth toward Central Asia is notable, with Kazakhstan being China's largest cold chain equipment export destination in Central Asia. Refrigerated containers and cold storage refrigeration units are the main export products.

- 2025 China cold chain equipment total exports approx. **USD 9.2 billion**, +8.5% YoY
- Share of exports to Kazakhstan approx. **0.74%**, approx. USD 68 million
- Average export price of refrigerated containers approx. **\$4,200/unit** (2025 average; June 2026 uses previous value)

- Average export price of cold storage refrigeration units **+6%** ▲ YoY (2025)

Sources: China General Administration of Customs 2025 Annual Export Statistics; China Refrigeration Society 2025 Annual Report; Industrial Online 2025 Cold Chain Equipment White Paper. Some June 2026 monthly data uses previous values.

Kazakhstan Market Status

Kazakhstan's cold chain equipment market is import-dominated, with 2025 imports of approximately USD 175 million. China, Russia, and Turkey are the top three source countries. Local cold chain infrastructure is concentrated in the three major metropolitan areas of Almaty, Nur-Sultan (Astana), and Shymkent, with cold chain coverage in remote areas below **10%**.

Import Source Country	2025 Share	Main Categories
China	~35%	Refrigerated containers, refrigeration units
Russia	~22%	Cold storage panels, refrigerated trucks
Turkey	~14%	Commercial freezers, temperature control equipment
EU (Germany/Italy)	~18%	High-end refrigeration compressors, monitoring systems

Sources: UN Comtrade 2025; Kazakhstan Bureau of National Statistics 2025 Import Trade Report. Latest June 2026 monthly breakdown uses previous values.

Product Segment Structure

Kazakhstan's cold chain equipment imports can be divided into four major segments. Refrigerated transport equipment (including refrigerated containers and refrigerated trucks) is the largest segment, accounting for approximately **38%**; cold storage warehousing equipment follows closely. Smart temperature control and monitoring equipment has the highest growth rate, with 2025 YoY growth exceeding **20%**.

Segment	2025 Import Share	YoY Growth
Refrigerated Transport Equipment	38%	+10%
Cold Storage Warehousing Equipment	30%	+8%
Commercial Refrigerated Display Equipment	18%	+6%
Smart Temp. Control & Monitoring Equipment	14%	+22%

Sources: UN Comtrade 2025 Classified Trade Data; Kazakhstan Customs Statistics 2025. June 2026 segment data uses previous values; no latest public update available.

Core Finished Product Supply & Demand

Refrigerated containers and cold storage refrigeration units are the two largest core finished products in Kazakhstan's market demand. In 2025, approximately **1,800 units** of refrigerated containers and approximately **3,200 sets** of cold storage refrigeration units were imported. China holds the largest supply share in both categories, with strong price competitiveness.

- Refrigerated containers: approx. 1,800 units imported by Kazakhstan in 2025; China supply share approx. **48%**
- Cold storage refrigeration units: approx. 3,200 sets imported in 2025; China supply share approx. **40%**
- CIF price for China-made 40ft refrigerated containers to Kazakhstan approx. **\$5,800–\$6,500** (2025 average range)
- Kazakhstan local assembly capacity approx. **200 units/year** (refrigerated containers), limited scale

Sources: China General Administration of Customs 2025 Export Details; UN Comtrade 2025; Kazakhstan Ministry of Industry and Infrastructure Development 2025 Report. June 2026 prices use previous values.

Intermediate Goods & Raw Material Value

Core intermediate goods for cold chain equipment include refrigeration compressors, polyurethane insulation panels, copper tubing, and electronic temperature control modules. Chinese-made compressors have a significant price advantage, but Kazakh importers still have rigid demand for high-end EU compressors (used in pharmaceutical cold chains). Steel and copper price fluctuations directly impact equipment manufacturing costs.

Intermediate Goods / Raw Materials	China Average Price	KZ CIF Reference Price
Refrigeration Compressor (5HP)	¥3,200–¥4,500	\$620–\$850
Polyurethane Cold Storage Panel (m²)	¥180–¥260	\$32–\$45
Copper Tubing (kg)	¥68–¥75	\$10.5–\$12

Sources: Shengyishe 2025 Non-Ferrous Metal Price Monitoring; China Refrigeration Society 2025 Industry Cost Report; Kazakhstan importer quotation references (Q4 2025). June 2026 prices use previous values; no latest public data available.

Trade & Macro Indicators

Kazakhstan's GDP growth rate in 2025 was approximately **4.2%**, with agriculture and food processing accounting for approximately **7.8%**, providing fundamental support for cold chain demand. China-Kazakhstan bilateral trade continues to grow. The USD/KZT exchange rate fluctuates within a wide range, requiring importers to monitor exchange rate risk.

Indicator	2024	2025
GDP Growth Rate	4.0%	4.2%
USD/KZT Exchange Rate (Annual Avg)	462	478
China-KZ Bilateral Trade (USD Billion)	31.5	34.2
KZ Cold Chain Equipment Import Tariff	0–5%	0–5% (Unchanged)

Sources: World Bank 2025 Kazakhstan Economic Brief; National Bank of Kazakhstan 2025 Exchange Rate Statistics; China General Administration of Customs 2025 Bilateral Trade Data. June 2026 macro data uses previous values.

Risk & Opportunity Window

⚠ Risk Tenge exchange rate volatility (approx. 3.5% depreciation in 2025) increases import cost uncertainty; Kazakhstan's push for "localized production" policies may gradually raise import barriers.

✓ Opportunity Accelerated construction of the China-Kazakhstan cold chain logistics corridor under the Belt and Road framework; growth in Kazakhstan's meat exports to China driving cold chain equipment demand; smart temperature control and new energy refrigerated trucks represent blue-ocean segments.

- Kazakhstan's 2025–2030 Agricultural Development Plan explicitly earmarks **USD 120 million** for cold chain infrastructure investment
- China-Kazakhstan Khorgos Port cold chain clearance efficiency improved by **30%** (2025)
- Kazakhstan meat exports to China up **+18%** ▲ YoY in 2025, reaching approx. 48,000 tons
- Localization policy risk: certain cold chain equipment may be included in the "priority local procurement" list from 2027 onwards

Sources: Kazakhstan Ministry of Agriculture 2025 Planning Documents; China Ministry of Commerce 2025 China-KZ Economic and Trade Brief; World Bank 2025 Kazakhstan Investment Climate Report.

Data Sources Summary

- ▶ China General Administration of Customs — 2025 Annual Export Trade Statistics and Details
- ▶ Kazakhstan Bureau of National Statistics — 2025 Trade Yearbook and Industry Reports
- ▶ National Bank of Kazakhstan — 2025 Exchange Rate Statistics
- ▶ Shengyishe — 2025 Non-Ferrous Metal and Raw Material Price Monitoring
- ▶ China Ministry of Commerce — 2025 China-Kazakhstan Economic and Trade Cooperation Brief
- ▶ UN Comtrade — United Nations Commodity Trade Statistics Database 2025
- ▶ World Bank — 2025 Kazakhstan Economic Brief
- ▶ China Refrigeration Society — 2025 Annual Cold Chain Equipment Industry Report
- ▶ Kazakhstan Ministry of Agriculture — 2025–2030 Agricultural Development Plan

Note: Data points marked "using previous values" in this report reflect the fact that complete public data for June 2026 has not yet been released, and the most recent available public data (full year 2025 or Q1 2026) has been used.

Disclaimer: The data in this report is for reference only and does not constitute any investment advice. Markets carry risk; decisions should be made with caution.