Overseas Market Analysis Report

Kazakhstan Vehicle Overseas Market Analysis Report

Target Country: **Kazakhstan** Main Category: **Vehicle** Report Updated: June 22, 2026

Kazakhstan Vehicle Market – Key Conclusions

In H1 2026, the Kazakhstan vehicle market continued its growth trajectory, with full-year sales expected to reach 360,000–380,000 units. Chinese brand market share climbed to approximately 28%, establishing structural advantages in the passenger car and NEV segments. KZT exchange rate fluctuations and EAEC tariff coordination are creating short-term price pressure, but deepening China-Kazakhstan bilateral cooperation underpins long-term growth.

Estimated 2026 Market Size **360K–380K units**

Chinese Brand Share ▲ **Approx. 28%**

Import Dependence Approx. 58%

NEV Penetration Rate ▲ **12.5%**

⚠ KZT has depreciated approx. 6.2% against USD YTD, driving up import vehicle cost pressure

Source: Kazakhstan Automobile Industry Association (KAIA) May 2026 Report; China General Administration of Customs, Jan–May 2026 Statistics

Supply and Demand Fundamentals

Kazakhstan's vehicle market shows a dual-track pattern of "rapid local assembly growth + sustained import supplementation". In 2025, local production was approximately 192,000 units and imports approximately 168,000 units, yielding total supply of about 360,000 units, essentially meeting domestic consumption demand. In H1 2026, local capacity utilization improved to approximately 78%.

Indicator	2024	2025	H1 2026 (Est.)
Local Production (10K units)	17.5	19.2	10.8
Vehicle Imports (10K units)	15.2	16.8	9.1
Total Market Supply (10K units)	32.7	36.0	19.9
Domestic Sales (10K units)	31.5	34.8	19.2

Source: Kazakhstan Bureau of National Statistics (KazStat), April 2026 Data; KAIA Quarterly Report Q1 2026

China Market Status

China's vehicle exports to Kazakhstan continue to post robust growth. From January to May 2026, China exported approximately 62,000 vehicles to Kazakhstan, up about 18% YoY, with NEV models accounting for approximately 22%. China's domestic vehicle production capacity is ample, export price competitiveness is outstanding, and the average FOB export price remains in an attractive range.

Jan–May 2026 Exports to Kazakhstan **Approx. 62K units**

YoY Growth Rate ▲ +18%

NEV Model Share 22%

China Passenger Car Avg. FOB Price Approx. USD 13,500–15,500/unit

Source: China General Administration of Customs, Monthly Export Statistics May 2026; China Association of Automobile Manufacturers, June 2026 Data

Kazakhstan Market Status

Local vehicle retail prices in Kazakhstan were impacted by KZT depreciation and import cost pass-through, with the average terminal price of mainstream passenger cars rising approximately 4.5% in H1 2026. Import dependence is about 58%, with China as the largest source country, accounting for approximately 41%. The consumption structure is predominantly passenger cars, with SUV and crossover demand growing fastest.

Source Country	Import Share	Main Category	Price Trend
China	41%	Passenger Cars, NEV	▲ Moderate Increase
Russia	22%	Commercial Vehicles, SUV	▲ Increase
Japan	15%	Used Cars, High-End	Stable
South Korea	10%	Passenger Cars	Stable

Source: KAIA Import Statistics April 2026; National Bank of Kazakhstan Exchange Rate Data June 2026

Product Segment Structure

Among Kazakhstan's vehicle import categories, passenger cars account for the largest share at about 68%, commercial vehicles about 20%, and NEV models about 12%, with the NEV segment leading in growth rate. SUV/crossover models represent over 55% of passenger car imports, reflecting a consumer preference shift toward multi-purpose vehicles. Within NEVs, battery electric vehicles (BEV) account for about 65%.

Segment	2025 Imports (10K units)	YoY Change	Avg. Price Range (USD 10K)
Passenger Cars (ICE)	10.2	▲ +9%	1.2–2.2
Commercial Vehicles	3.1	+5%	2.5–5.5
NEV Passenger Cars	2.5	▲ +42%	1.8–3.8
Used Vehicles	0.9	▼ -11%	0.5–1.5

Source: China General Administration of Customs, Full-Year 2025 Export Statistics; KAIA Segment Report March 2026

Core Product Supply and Demand

Kazakhstan's local assembly capacity is approximately 250,000 units/year, with actual 2025 production of 192,000 units, representing capacity utilization of about 77%. Major assembled brands include JAC, Kia, and Hyundai. New local capacity additions in 2026 are limited, and the supply-demand gap still needs to be filled by imports. NEV local assembly lines remain in the planning stage.

Local Assembly Capacity Approx. 250K units/year

2025 Actual Production 192K units

Capacity Utilization **Approx. 77%**

Supply-Demand Gap (Relying on Imports) **Approx. 168K units**

Source: KAIA Annual Report 2025; SaryarkaAvtoProm Operational Data Q1 2026

Intermediate Goods and Raw Material Value

Key intermediate goods involved in vehicle exports include auto parts, KD kits, and raw materials. China's auto parts exports to Kazakhstan reached approximately USD 380 million from January to May 2026, up about 14% YoY. KD kit exports are the core pillar of local assembly, with costs representing approximately 55%–65% of the vehicle value. Steel price fluctuations have a significant impact on manufacturing costs.

Intermediate Goods / Raw Materials	China Reference Price	Kazakhstan CIF Cost (Est.)
Automotive Cold-Rolled Steel (CNY/ton)	4,800–5,200	Incl. freight approx. +8%–12%
KD Passenger Car Kit (USD/set)	7,500–9,000	CIF approx. 8,800–10,500
Power Battery Pack (USD/kWh)	Approx. 85–95	CIF approx. 100–115

Source: Mysteel Steel Prices June 2026; Longzhong Info Battery Materials Weekly June 2026; China Customs Auto Parts Export Statistics

Trade and Macro Indicators

Kazakhstan's macroeconomic performance remains steady, with 2026 GDP growth expected at approximately 4.2%. China-Kazakhstan bilateral trade volume continues to climb, with vehicle and parts trade benefiting from tariff preferences under the EAEC framework. KZT exchange rate volatility is a core variable affecting import costs; the National Bank of Kazakhstan maintains its base rate to stabilize exchange rate expectations.

2026 GDP Growth (Est.) **4.2%**

KZT/USD Exchange Rate (June 2026) Approx. 485 KZT/USD

China-Kazakhstan Bilateral Trade (2025) **Approx. USD 41 billion**

EAEC Vehicle Import Tariff 15%–25% (by engine displacement)

Source: World Bank Kazakhstan Economic Outlook April 2026; National Bank of Kazakhstan Exchange Rate Data June 2026; China Ministry of Commerce Trade Statistics

Risks and Opportunity Windows

Key risks include continued KZT depreciation pushing up import costs, uncertainty in EAEC tariff policy adjustments, and intensifying geopolitical competition in Central Asia. Opportunity windows center on the rapid growth of China's NEV vehicle exports, Kazakhstan's localization policies supporting KD assembly, and logistics cost optimization driven by enhanced connectivity under the China-Kazakhstan Belt and Road framework.

⚠ Exchange Rate Risk ▼ KZT depreciated 6.2% YTD

✓ NEV Opportunity ▲ NEV export growth +42%

✓ Localization Policy KD assembly enjoys tariff relief

China-Kazakhstan Logistics Corridor Khorgos port clearance efficiency improving

⚠ Monitor H2 2026 EAEC Customs Union tariff review, which may affect vehicle import cost structure

Source: KAIA Policy Brief May 2026; Economic and Commercial Office of the Chinese Embassy in Kazakhstan, June 2026 Information

Data Sources Summary

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