Overseas Market Analysis Report

Kazakhstan Tire Overseas Market Analysis Report

 Target Country: Kazakhstan Main Category: Tires Report Date: June 22, 2026

Kazakhstan Tire Core Conclusions

Kazakhstan's tire market has an import dependency of over 92%, with China firmly holding the position as the largest supplier. In the first half of 2026, high natural rubber prices, combined with exchange rate fluctuations of the tenge, have significantly increased pressure on tire import costs. The advancement of localized production and accelerated infrastructure investment constitute key medium-term variables.

- Import dependency: **92.5%** (full-year 2025 data)
- China's supply share: **approximately 58%**, up 3 percentage points from 2024
- Q1 2026 average import price YoY increase: **▲6.8%**
- Core risks: exchange rate volatility of tenge against USD, progress of localized capacity implementation

Source: Kazakhstan Bureau of Statistics, General Administration of Customs of China, updated June 2026

Supply and Demand Fundamentals

Kazakhstan's domestic tire production capacity is limited, with an annual output of about 280,000 tires, far insufficient to meet the domestic annual demand of approximately 3.8 million tires. The supply-demand gap is mainly filled by imports, with the replacement market accounting for over 75%.

Indicator	2024	2025	YoY Change
Domestic Production (10k tires)	26	28	+7.7%
Import Volume (10k tires)	345	352	+2.0%
Total Consumption (10k tires)	368	378	+2.7%
Import Dependency	93.8%	92.5%	-1.3pp

Source: Kazakhstan Bureau of Statistics, EEC Trade Database, June 2026

China Market Status

China's tire industry maintained high operating rates in the first half of 2026, with all-steel tire operating rates at about 72% and semi-steel at about 78%. Export volumes to Kazakhstan have been steadily increasing, with strong price competitiveness.

- All-steel tire (TBR) operating rate: **72.3%** (third week of June 2026)
- Semi-steel tire (PCR) operating rate: **78.1%** (third week of June 2026)
- Tire exports to Kazakhstan (2025): approximately **USD 78.5 million**
- Average export price YoY: **▲4.2%** (raw material cost pass-through)

Source: Longzhong Information, General Administration of Customs of China, June 20, 2026

Kazakhstan Market Status

Retail market prices for tires in Kazakhstan continue to rise driven by import costs, with the average replacement market price up about 7% YoY in Q1 2026. Almaty and Astana are the two core consumption cities.

Major Source Country	2025 Import Share	Main Categories
China	58%	TBR, PCR, OTR
Russia	18%	TBR, Winter Tires
South Korea	8%	PCR, High-Performance Tires
Japan/Turkey	6%/4%	PCR, OTR

Source: Kazakhstan Bureau of Statistics, EEC, June 2026

Product Segmentation

Truck and bus tires (TBR) are the largest imported category in Kazakhstan, accounting for about 48%; passenger car tires (PCR) follow, and engineering machinery tires (OTR) are growing fastest, benefiting from infrastructure investment.

Segment	2025 Import Share	Demand Growth Rate	Trend
Truck & Bus Tires (TBR)	48%	+3.5%	Steady Growth
Passenger Car Tires (PCR)	34%	+2.8%	Gradual Increase
Off-the-Road Tires (OTR)	12%	**+12.6%**	Rapid Growth

Source: Kazakhstan Customs Data, Industry Statistics, June 2026

Core Finished Product Supply and Demand

All-steel radial truck tires (TBR), as the core market category, are seeing a widening supply-demand gap. Import volumes grew by 4.2% YoY in Q1 2026, with Chinese brands dominating due to their cost-effectiveness.

- TBR annual import volume: approximately **1.69 million tires** (2025)
- Domestic TBR production: about **120,000 tires**, meeting only 7% of demand
- Chinese TBR CIF average price: **USD 185-210 per tire** (June 2026)
- Inventory turnover days: **45-55 days** (Almaty major distributors)

Source: Longzhong Information, Almaty Tire Distributor Survey, June 2026

Intermediate Goods and Raw Material Values

High natural rubber prices are the main driver of tire cost increases. In June 2026, the natural rubber quotation in Chinese producing regions is about RMB 14,500/ton, with carbon black and synthetic rubber prices also in a relatively strong range.

Raw Material	China Producing Region Price	Kazakhstan Import CIF Reference Price	YoY Change
Natural Rubber (SCRWF)	RMB 14,500/ton	USD 1,980/ton	+11.5%
SBR (SBR1502)	RMB 12,800/ton	USD 1,750/ton	+6.2%
Carbon Black (N330)	RMB 8,600/ton	USD 1,180/ton	+3.8%

Source: Shengyi She, Longzhong Information, Argus Media, June 20, 2026

Trade and Macro Indicators

Kazakhstan's GDP growth rate in 2025 was about 4.3%, with vehicle ownership surpassing 5.2 million. Within the Eurasian Economic Union framework, tariff preferences for tire imports continue, with Chinese tires enjoying zero tariff treatment.

Indicator	Value	Time
GDP Growth Rate	4.3%	2025
Vehicle Ownership	~5.22 million	End of 2025
USD/KZT Exchange Rate	~462.5	June 2026
Tire Import Tariff (EAEU)	0% (China)	Current

Source: World Bank, National Bank of Kazakhstan, EAEU, June 2026

Risks and Opportunity Windows

The geopolitical environment is relatively stable, but exchange rate volatility of the tenge and the advancement of localized production are core uncertainties. Accelerated infrastructure investment brings structural growth opportunities for engineering machinery tires.

- Exchange Rate Risk The tenge has depreciated about 3.5% against USD in 2026, pushing up import costs
- Localization Substitution The Kazakh government promotes expansion of domestic tire plants, with capacity expected to double by 2027
- Opportunity: **The 'Bright Road' infrastructure plan** drives OTR demand growth of 12%-15%
- Bilateral Cooperation: China-Kazakhstan logistics corridor continues to optimize, with improved customs clearance efficiency at the Khorgos port

Source: Ministry of Industry and Infrastructure Development of Kazakhstan, World Bank, June 2026

Data Source Summary

Kazakhstan Bureau of Statistics — Import and consumption data

General Administration of Customs of China — China's tire export data to Kazakhstan

Longzhong Information — China tire operating rates and price monitoring

Shengyi She — Raw material prices for natural rubber, carbon black, etc.

Argus Media — International rubber and carbon black price benchmarks

World Bank — Kazakhstan macroeconomic indicators

Eurasian Economic Commission — Trade and tariff data

National Bank of Kazakhstan — Exchange rate data

Ministry of Industry and Infrastructure Development of Kazakhstan — Industrial policy

Almaty Tire Distributor Survey — End-market inventory and prices