

Kazakhstan Construction Machinery · Overseas Market Analysis Report

Report Date: June 22, 2026Target Country: Kazakhstan

Main Category: Construction MachineryData as of: June 2026

Kazakhstan Construction Machinery Core Conclusions

Kazakhstan's construction machinery market is highly dependent on imports, with an **import dependency rate exceeding 80%**. In 2025, China's construction machinery exports to Kazakhstan reached approximately **\$1.28 Billion USD**, a year-on-year increase of **↑12.3%**. Infrastructure investment (up 18% in 2025) and mining expansion continue to drive demand. Main risks: Tenge exchange rate fluctuations, high logistics costs in Central Asia, and competition from low-priced Russian products.

Key Indicator	2025 Data	YoY
CN Exports to Kazakhstan	\$1.28 Billion	↑12.3%
Kazakhstan Infrastructure Investment Growth	18%	↑
Import Dependency	82%	Stable

Source: General Administration of Customs of China (Jan-May 2026 data & 2025 Annual Report); National Bureau of Statistics of Kazakhstan (2025)

Supply and Demand Fundamentals

In 2025, Kazakhstan's apparent consumption of construction machinery was approximately **\$1.58 Billion USD**, while domestic production was only about \$0.29 Billion USD. Imports accounted for **81.6%** of consumption. Main consumption sectors: Mining (38%), Infrastructure (32%), Oil & Gas (18%), Agricultural Engineering (12%).

Item	Amount (\$100M USD)	Share
Domestic Production	2.9	18.4%
Import Volume	12.9	81.6%
Apparent Consumption	15.8	100%

Source: National Bureau of Statistics of Kazakhstan Industrial Output Report (2025); ITC Trade Map Kazakhstan Import Data (2025)

China Market Status

In May 2026, the comprehensive operating rate of major Chinese construction machinery enterprises was approximately **61.5%**, a slight decrease of 0.8 percentage points from April. Excavator exports reached **8,520 units**, a year-on-year increase of **19.2%**. Lower domestic steel prices reduced manufacturing costs, enhancing export price competitiveness.

Indicator	May 2026	MoM
Overall Operating Rate	61.5%	↓0.8pct
Excavator Export Volume	8,520 Units	↑9.2%
Average HRC Price	3,820 CNY/Ton	↓2.1%

Source: China Construction Machinery Industry Association (Released June 2026); Mysteel Steel Prices (June 22, 2026)

Kazakhstan Market Status

In 2025, Kazakhstan's construction machinery imports reached **\$1.29 Billion USD**, with China accounting for **48%** (approximately \$0.62 Billion USD), making it the largest source country. Next were Russia (19%), Germany (8%), and the USA (6%). Imports in Q1 2026 grew 11% year-on-year, with peak season demand starting early.

Source Country	2025 Import Value (\$100M USD)	Share
China	6.2	48%
Russia	2.45	19%
Germany	1.03	8%

Source: ITC Trade Map; National Bureau of Statistics of Kazakhstan Foreign Trade Data (2025 Annual & 2026 Q1)

Segmented Product Structure

Kazakhstan's construction machinery imports are dominated by **Excavators** (31% share), **Loaders** (22%), and **Bulldozers & Graders** (16%). In 2025, excavator imports reached approximately \$0.4 Billion USD, with Chinese brands (SANY, XCMG, etc.) holding about 55% of this segment.

Category	Import Value (\$100M USD)	Share	China Share
Excavators	4.0	31%	55%
Loaders	2.84	22%	50%
Bulldozers/Graders	2.06	16%	42%

Core Product Supply & Demand

Taking **medium excavators (20-30 tons)** as an example, market demand in Kazakhstan was approximately **3,200 units** in 2025, with Chinese brands delivering about 1,760 units. Demand in Q1 2026 grew 14% year-on-year, while the supply side was affected by logistics cycles, with delivery times extending to 45-60 days.

Indicator	2025	Q1 2026
Medium Excavator Demand (Units)	3,200	910 (Q1)
Chinese Brand Deliveries (Units)	1,760	502
Avg. Delivery Cycle (Days)	40	52

Source: China Construction Machinery Industry Association Export Monitoring (2025); Kazakhstan Dealer Survey Data (Q1 2026)

Intermediate Goods & Raw Material Value

The downward trend in core raw material prices for construction machinery is favorable for exports. In June 2026, Chinese HRC was **3,820 CNY/Ton** (down 8% YoY), while diesel engines and hydraulic components remained stable. The comprehensive freight cost to Kazakhstan is approximately **\$380-450 USD per unit** (medium-sized equipment), up about 6% from 2025.

Item	Price (Jun 2026)	YoY
HRC (China Ex-works)	3,820 CNY/Ton	↓8%
Diesel Engine Assembly	42k-58k CNY/Unit	Stable
CN-KZ Land Freight (40ft)	\$5,800-\$6,500	↑6%

Source: Mysteel (June 22, 2026); China Federation of Logistics & Purchasing China-Europe Railway Express Freight Rates (May 2026)

Trade & Macro Indicators

Kazakhstan's GDP growth rate was **4.6%** in 2025, with construction sector added value up **↑11.2%**. Bilateral trade between China and Kazakhstan reached **\$43.8 Billion USD** (China Customs data),

and China's FDI stock in Kazakhstan exceeded \$18 Billion USD. The Tenge to RMB exchange rate in June 2026 was approximately **1 CNY ≈ 65.2 KZT**.

Indicator	Data	Time
Kazakhstan GDP Growth	4.6%	2025
Construction Value Added Growth	11.2%	2025
CN-KZ Bilateral Trade	\$43.8 Billion	2025
Exchange Rate CNY/KZT	≈65.2	June 2026

Source: World Bank Kazakhstan Economic Brief (April 2026); General Administration of Customs of China (2025); National Bank of Kazakhstan Exchange Rate (June 2026)

Risks & Opportunity Window

△ Risk: Tenge exchange rate volatility (depreciated ~7% in 2025), Central Asian land transport congestion, impact from lower-priced Russian competitors.

Opportunity Kazakhstan's "Nurly Zhol" infrastructure plan added **\$4.5 Billion USD** in 2026; deepening China-Kazakhstan production capacity cooperation, localized assembly can enjoy tax incentives; strong demand for machinery renewal in mining concession projects.

△ Attention: In Q2 2026, Kazakhstan plans to adjust import machinery tariff classifications, which may affect customs clearance costs for some categories. It is recommended to closely follow the latest announcements from the Kazakhstan Ministry of Finance.

Source: Kazakhstan Prime Minister's Office News (March 2026); Commercial Office of the Chinese Embassy in Kazakhstan (May 2026)

Data Source Summary (Selected Key Sources)

- General Administration of Customs of China — Import and export statistics for 2025 and Jan-May 2026
- National Bureau of Statistics of Kazakhstan — Industrial output and foreign trade data (2025 Annual)
- ITC Trade Map — Kazakhstan construction machinery import breakdown (2025)
- China Construction Machinery Industry Association — Operating rate and export monitoring (June 2026)
- Mysteel (Shanghai Ganglian) — Steel price data (June 22, 2026)
- World Bank — Kazakhstan Economic Brief (April 2026)
- National Bank of Kazakhstan — Exchange rate data (June 2026)
- Commercial Office of the Chinese Embassy in Kazakhstan — Market dynamics (May 2026)
- China Federation of Logistics & Purchasing — China-Europe Railway Express freight rates (May 2026)
- Kazakhstan Prime Minister's Office — Infrastructure investment announcement (March 2026)

Disclaimer: The data in this report is for reference only and does not constitute any investment advice. Markets are risky, decisions should be made with caution. Some monthly data uses prior values or is extrapolated based on published quarterly data, please refer to the official

releases of the respective source institutions for accuracy.