Overseas Market Analysis Report

Kazakhstan Agricultural Machinery Overseas Market Analysis Report

Target Country: **Kazakhstan** Main Category: **Agricultural Machinery** Report Date: June 22, 2026

Key Conclusions on Kazakhstan Agricultural Machinery

Kazakhstan's agricultural machinery market has an import dependence of about **75%**, with a market size of approximately **USD 1.95 billion** in 2025. China remains the second-largest supplier with a share of about **22%**, second only to Russia. Demand for high-horsepower tractors and combine harvesters is strong, driven by the Kazakh government's agricultural modernization subsidy policies. ⚠ Ruble exchange rate volatility and uncertainties in Russian supply constitute major risks, but also create a substitution window for Chinese enterprises.

Import dependence: approx. 75% (2025)

China supply share: approx. 22%, +2.3 ppts YoY

Market size 2025: approx. USD 1.95 billion ▲ +6.8%

Key risk: Ruble exchange rate volatility & logistics bottlenecks

Source: Bureau of National Statistics of Kazakhstan, April 2026; General Administration of Customs of China, May 2026 trade data.

Supply & Demand Fundamentals

Annual demand for agricultural machinery in Kazakhstan is approximately **38,000–42,000 units** (including tractors, harvesters, and tillage equipment). Domestic production meets only about 25% of demand; the rest depends on imports. Total imports in 2025 were about **USD 1.46 billion**, mainly for grain cultivation (wheat, barley) and livestock feed production.

Indicator	2024	2025	YoY Change
Domestic Demand (10k units)	3.72	3.95	+6.2%
Domestic Production (10k units)	0.92	0.98	+6.5%
Net Imports (10k units)	2.80	2.97	+6.1%
Import Value (USD 100 million)	13.2	14.6	+10.6%

Source: Bureau of National Statistics of Kazakhstan, April 2026; World Bank Kazakhstan Agriculture Report, December 2025.

China Market Status

In 2025, China's total agricultural machinery exports were about **USD 19.8 billion**, of which exports to Kazakhstan were about **USD 320 million**, accounting for 1.6%. The average export price of tractors rose by about 4.5% YoY, mainly due to pass-through of steel costs. China's large and medium tractor capacity utilization held at **78%–82%**, with sufficient export orders.

2025 China agri-machinery export total: approx. USD 19.8 billion ▲ +8.3%

Exports to Kazakhstan: approx. USD 320 million ▲ +14.5%

Avg. export price large & medium tractors: approx. USD 18,500/unit (Q1 2026)

Industry capacity utilization: approx. 80% (May 2026)

Source: General Administration of Customs of China, May 2026 trade data; China Association of Agricultural Machinery Manufacturers (CAAMM), June 2026 industry brief.

Kazakhstan Market Status

Kazakhstan's agricultural machinery fleet totals approximately **420,000 units**, of which over **60%** are more than 10 years old, creating urgent replacement demand. Main import sources are Russia (~38%), China (~22%), Germany (~12%), and Belarus (~9%). In 2025, the government's budget for machinery renewal subsidies was about **USD 180 million**.

Machinery fleet: approx. 420,000 units (end-2025)

Share of aged equipment: over 60% (>10 years)

Top supplier: Russia, approx. 38%

Government renewal subsidy: approx. USD 180 million/year

Source: Ministry of Agriculture of Kazakhstan, March 2026; UN Comtrade database, updated May 2026.

Product Segmentation

Among imported agricultural machinery in Kazakhstan, **tractors** hold the largest share (~42%), followed by **combine harvesters** (~22%) and **seeding & tillage machinery** (~17%). Demand for high-horsepower tractors (≥100 HP) has grown significantly, with 2025 import volume up about 11% YoY.

Sub-category	Import Share	2025 Import Value	YoY Trend
Tractors (incl. large & medium)	42%	USD 613 million	▲ +9.2%
Combine Harvesters	22%	USD 321 million	▲ +7.8%
Seeding & Tillage Machinery	17%	USD 248 million	▲ +5.5%
Crop Protection & Irrigation Equipment	10%	USD 146 million	▲ +12.1%

Source: UN Comtrade, updated May 2026; Bureau of National Statistics of Kazakhstan trade classification data.

Core Product Supply & Demand

High-horsepower tractors (≥100 HP) are the category with the largest supply gap. In 2025, Kazakhstan imported about **14,500 units** of this category, with China supplying about **3,200 units** (22% share). Kazakhstan can only assemble a small number of small tractors locally; large-horsepower products rely almost entirely on imports.

Demand for high-horsepower tractors: approx. 15,000 units/year

Local supply capacity: fewer than 800 units (mostly small)

Chinese supply: approx. 3,200 units (2025)

Supply gap: approx. 12,000 units, gap rate >80%

Source: General Administration of Customs of China, May 2026; Bureau of National Statistics of Kazakhstan, April 2026.

Intermediate Inputs & Raw Material Values

In agricultural machinery manufacturing costs, **steel** accounts for about 35%–45%, **engines and transmission systems** for about 25%–30%. In June 2026, the price of hot-rolled coil in China was about **RMB 3,850/mt**, slightly down from the start of the year. In the landed cost of Chinese agricultural machinery imported by Kazakhstan, logistics costs represent about **8%–12%**.

Intermediate / Raw Material	China Ex-works Price	Ref. Landed Cost in Kazakhstan
Hot-rolled coil (Q235)	RMB 3,850/mt	approx. USD 520/mt (incl. logistics)
Diesel engine (100 HP class)	approx. RMB 28,000/unit	approx. USD 4,200/unit (landed)
Hydraulic system assembly	approx. RMB 15,000/set	approx. USD 2,300/set (landed)

Source: Longzhong Information, June 2026 steel price data; SMM, May 2026; industry survey estimates.

Trade & Macro Indicators

Kazakhstan's GDP growth in 2025 was about **4.3%**, with agriculture accounting for about **5.1%** of GDP. Bilateral trade between China and Kazakhstan was about **USD 41 billion**. The KZT/USD exchange rate remained in the **460–475** range. The Kazakh government offers preferential policies such as a **5-year corporate income tax exemption** for foreign-invested agricultural machinery enterprises.

GDP growth (2025): 4.3%

Agriculture share of GDP: 5.1%

China-Kazakhstan bilateral trade: approx. USD 41 billion

Exchange rate (USD/KZT): approx. 468 (June 2026)

Source: World Bank, updated April 2026; National Bank of Kazakhstan, June 2026 exchange rate data.

Risks & Opportunity Window

⚠ Risks: Russian supply uncertainty has increased due to sanctions; KZT exchange rate fluctuations may affect importers' ability to pay; Central Asian logistics corridors (railway capacity) experience occasional tightness. ✓ Opportunities: The Kazakh government's **2026–2028 agricultural machinery renewal plan** has an increased budget of about **USD 220 million/year**; Chinese machinery offers clear cost-performance advantages, with ample room for localized assembly cooperation; capacity on the China-Europe Railway Express southern route via Kazakhstan continues to improve.

Geopolitical risk: Russian supply uncertainty

Exchange rate risk: KZT fluctuation ±8% p.a.

Policy opportunity: 2026–2028 machinery renewal plan, annual budget USD 220 million

Cooperation window: Localized assembly + technical service exports

Source: Kazakhstan Ministry of Agriculture planning document, February 2026; MOFCOM Country Investment Guide (Kazakhstan), April 2026.

Data Sources Summary

- Bureau of National Statistics of Kazakhstan – April 2026 release
- General Administration of Customs of China – May 2026 trade data
- UN Comtrade international trade statistics database – updated May
- World Bank Kazakhstan country data – updated April 2026

2026

China Association of Agricultural Machinery Manufacturers (CAAMM) Industry Brief – June 2026

Longzhong Information steel price data – June 2026

Ministry of Agriculture of Kazakhstan – released February-March 2026

National Bank of Kazakhstan exchange rate data – June 2026

SMM (Shanghai Metals Market) industrial raw material prices – May 2026

MOFCOM Country Investment Guide (Kazakhstan) – updated April 2026