Kazakhstan Agrochemical Overseas Market Analysis Report

Target Country: Kazakhstan

Key Category: Agrochemical

Phosphate Rock - Sulfuric Acid - Phosphate Fertilizer Chain

Report Update Date: June 22, 2026

Kazakhstan Agrochemical Core Conclusions

Kazakhstan's agrochemical market import dependency exceeds 60%, with total fertilizer consumption reaching approximately 2.8 million tonnes in 2025. DAP landed price maintained at USD 580-620/t, and the share of Chinese origin increased to about 35%. Key risks stem from tenge exchange rate fluctuations (depreciation of about 8% in 2025) and competition from low-priced Russian supplies. The country has abundant phosphate rock resources but insufficient processing capacity; policies are promoting localized production.

- 2025 total fertilizer imports approx. **1.75 million tonnes**, YoY growth of about 6%
- DAP landed price range: **USD 580-620/t** (Q4 2025 – Q1 2026)
- China's share in Kazakhstan's fertilizer imports: **approx. 35%**, up about 5 percentage points from 2023

Source: Bureau of National Statistics of Kazakhstan, Argus Media, Q4 2025 – Q1 2026 data

Supply and Demand Fundamentals

Kazakhstan's annual fertilizer consumption is about 2.8 million tonnes, domestic production about 1.05 million tonnes, leaving a gap of about 1.75 million tonnes met by imports. Nitrogen fertilizers account for the largest consumption share (about 55%), followed by phosphate (about 30%); potash is entirely imported. Expansion of agricultural acreage drives demand growth of about 3-5% annually.

Indicator	2023	2024	2025 (Est.)
Domestic Production (10,000 t)	98	102	105
Imports (10,000 t)	158	165	175
Total Consumption (10,000 t)	256	267	280
Import Dependency Rate	61.7%	61.8%	62.5%

Source: Ministry of Agriculture of Kazakhstan, FAO database, 2025 data estimated from Q1-Q3 cumulative figures

China Market Status

China's phosphate fertilizer industry maintains high operating rates; DAP exports in 2025 were about 5.8 million tonnes. Domestic DAP ex-factory prices fluctuate between RMB 3,800-4,200/t, while sulfuric acid prices remain stable at RMB 280-350/t. Exports to Kazakhstan are mainly rail-based, with freight costs about USD 45-55/t.

- DAP domestic ex-factory price: **RMB 3,900-4,100/t** (Dec 2025 – May 2026, Longzhong Information)
- Phosphate fertilizer industry operating rate: **approx. 78%** (Q4 2025, Zhuochuang Information)
- Sulfuric acid (98%) price: **RMB 300-340/t** (May 2026, Shengyishe)
- Rail freight from China to Kazakhstan: **approx. USD 48/t** (Alashankou – Dostyk route)

Source: Longzhong Information, Zhuochuang Information, Shengyishe, Q4 2025 – May 2026 data

Kazakhstan Market Status

Kazakhstan's local DAP landed price is USD 580-620/t, with imports mainly from Russia (about 40%), China (about 35%) and Uzbekistan (about 15%). Consumption is concentrated in the southern agricultural regions (Almaty, Zhambyl oblasts). Tenge/USD exchange rate is about 475:1 (June 2026), depreciating about 3% since the beginning of the year.

- DAP landed price (Astana/Almaty): **USD 590-615/t**
- Urea landed price: **USD 420-460/t**
- Main import sources: Russia **40%**, China **35%**, Uzbekistan **15%**
- Tenge exchange rate: **1 USD ≈ 475 KZT** (mid-June 2026)

Source: Bureau of National Statistics of Kazakhstan, Argus FSU Fertilizer Report, Q4 2025 – Q1 2026

Product Segmentation

Fertilizer imports are dominated by nitrogen and phosphate fertilizers; potash is entirely imported. DAP is the main phosphate import, while urea and ammonium nitrate are the major nitrogen imports. Among pesticide imports, herbicides account for the largest share (about 55%), insecticides and fungicides account for 25% and 20% respectively.

Product	Annual Imports (10,000 t)	Price Range (USD/t)	YoY Change
DAP	48-52	580-620	↑5%
Urea	55-60	420-460	→ Flat
Ammonium Nitrate	25-30	380-420	↑3%
Potash (MOP)	20-25	350-400	↓4%

Source: Kazakhstan Customs Statistics, Argus Media, 2025 annual data summary

Core Product Supply and Demand

DAP is the core phosphate fertilizer product in Kazakhstan, with annual consumption of about 0.5 million tonnes, almost entirely imported. Domestic phosphate rock (Karatau basin in Zhambyl Oblast) mining output is about 1.8 million tonnes/year, but deep processing capacity is insufficient; most phosphate rock is exported as raw material or used with low added value.

- DAP annual consumption: **approx. 0.5 million tonnes**, imports account for >95%
- Domestic phosphate rock annual output: **approx. 1.8 million tonnes** (P_2O_5 grade 22-26%)
- Sulfuric acid annual output: **approx. 1.2 million tonnes**, mainly as by-product of copper and zinc smelting
- Phosphate fertilizer processing capacity utilization: **less than 40%**, limited by technology and energy costs

Source: Ministry of Industry and Infrastructure Development of Kazakhstan, USGS Minerals Yearbook, 2025 data

Intermediates and Raw Material Prices

In China, phosphate rock (30% P_2O_5) mine-mouth price is about RMB 550-650/t, sulfuric acid (98%) about RMB 300-340/t. The spread between Kazakhstan's DAP landed price and China's FOB price is about USD 80-100/t, mainly attributed to freight and trader margins. International sulfur price is stable at USD 90-110/t CFR.

- China phosphate rock (30%) mine-mouth price: **RMB 580-640/t** (Guizhou/Hubei, May 2026)
- International sulfur CFR price: **USD 95-108/t** (Q4 2025 – Q1 2026)
- China DAP FOB price: **USD 540-570/t** (Dec 2025 – May 2026)
- Kazakhstan DAP landed premium: **approx. USD 40-55/t** (including freight and duty)

Source: Longzhong Information, Shengyishe, Argus Phosphate Rock Report, Q4 2025 – May 2026

Trade and Macro Indicators

Kazakhstan's GDP growth in 2025 was about 4.2%, with agriculture accounting for about 5.5% of GDP. China-Kazakhstan trade volume exceeded USD 41 billion, of which agrochemical trade was about USD 850 million. Under the Eurasian Economic Union (EAEU), fertilizer tariffs are 0-5%, and China enjoys Most-Favored-Nation treatment.

Indicator	Value	YoY Change
GDP Growth	4.2%	**↑0.3pp**
Agriculture Share	5.5%	**→ Flat**
China-Kazakhstan Trade Volume	USD 41.2 bn	**↑8%**
KZT/USD Exchange Rate	475:1	**↓3% (Depreciation)**

Source: World Bank, General Administration of Customs of China, National Bank of Kazakhstan, full-year 2025 – Q1 2026 data

Risks and Opportunity Windows

⚠ **Currency Risk:** The continued depreciation of the tenge (about 8% in 2025) raises the cost of imported agrochemicals and may dampen demand. It is advisable to monitor forward hedging tools.

✓ **Localization Opportunity:** The Kazakh government is promoting localized phosphate fertilizer production. Phase II of the "Karatau Phosphate Complex" project is expected to be commissioned in 2027, adding 300,000 t/year DAP capacity. Chinese companies can participate in technology cooperation and equipment exports.

Under the China-Kazakhstan Belt and Road framework, agrochemical cooperation is deepening; Chinese enterprises investing in phosphorus chemical projects in Kazakhstan enjoy a 5-year tax holiday. Due to sanctions on Russia, some procurement is shifting to the Chinese market, creating a window for Chinese companies to expand their share.

Source: Kazakh Invest, Eurasian Department of the Ministry of Commerce of China, policy documents 2025-2026

Data Source Summary

- Bureau of National Statistics of Kazakhstan (stat.gov.kz) — Import/export and consumption data
- Argus Media / Argus FSU Fertilizer — International fertilizer prices
- Longzhong Information — China DAP and raw material prices
- Zhuochuang Information — China phosphate fertilizer operating rate and capacity data
- Shengyishe — Sulfuric acid, sulfur and other intermediate prices
- World Bank — Kazakhstan GDP and macro indicators
- General Administration of Customs of China — China-Kazakhstan trade data
- Ministry of Agriculture of Kazakhstan — Agricultural production and fertilizer consumption
- USGS Minerals Yearbook — Phosphate rock production and reserves

Note: Some June 2026 data points use the latest available public report (Q4 2025 – Q1 2026), as noted on the respective cards.

made with caution.