Kazakhstan Coffee · Overseas Market Analysis Report

Target Country: Kazakhstan　Main Category: Coffee

Report Updated: June 22, 2026

Kazakhstan Coffee Core Conclusions

In H1 2026, Kazakhstan's coffee consumption remains heavily import-dependent, with an import penetration rate of 98%. Affected by Brazilian drought and tight shipping capacity in Southeast Asia, overall CIF prices rose approximately 9% year-on-year. Moderate tenge depreciation pushed up end-retail costs. Instant coffee remains dominant, but specialty coffee demand is growing significantly.

+9%
Comprehensive CIF price increase

98%
Import dependency

18.5k tonnes
Estimated H1 imports

□ Source: Bureau of National Statistics of Kazakhstan, Jun 2026

Supply-Demand Fundamentals

Kazakhstan has no commercial coffee cultivation; supply relies entirely on imports. Total domestic consumption in 2026 is projected to reach 38,000 tonnes, with instant coffee accounting for 72%. Driven by rising incomes and coffee culture adoption, consumption growth is expected to accelerate to 8.5%.

Indicator	2025	2026 (Est.)
Total Consumption (10k t)	3.5	3.8
Net Imports (10k t)	3.5	3.8
Consumption Growth (%)	5.0	8.5 ↑

□ Source: UN Comtrade, Jun 2026

China Market Situation

China's domestic coffee demand is strong, driving growth in both imports and processing capacity. In May 2026, green bean imports rose 18% year-on-year, and the average price of Yunnan specialty green beans increased by 15%. Chinese-brand instant and drip-bag coffee exports to Kazakhstan continue expanding, with notable supply chain synergies.

+18%
China green bean import YoY

32 CNY/kg
Yunnan green bean avg.

+22%
Instant coffee export to KZ

 Source: General Administration of Customs of China, Jun 2026

Kazakhstan Market Situation

The average retail price of local instant coffee is about 2,500 tenge/kg (approx. 5.5 USD). The number of specialty coffee shops in Almaty and Nur-Sultan grew 35% annually. Thanks to the Eurasian Economic Union's zero-tariff policy, the share of European brands re-exported via Russia rebounded to 15%.

2,500 tenge
Instant retail avg. price

500+
Specialty coffee shops

15%
Russia re-export share

 Source: Bureau of National Statistics of Kazakhstan, Jun 2026

Product Segment Structure

Instant coffee (2101.11) ranks first in import value, while unroasted coffee beans (0901.11) are growing rapidly. Younger consumer groups are driving rapid penetration of RTD and capsule categories, with the import structure trending toward premiumization.

Segment	H1 Import Vol. (t)	YoY%
Instant Coffee	11,700	+6%
Unroasted Beans	4,500	+19%
Roasted Coffee	1,800	+11%

 Source: Bureau of National Statistics of Kazakhstan, Jun 2026

Core Finished Product Supply & Demand

Instant coffee powder is the core finished product. Global Robusta bean shortages have driven raw material costs sharply higher, squeezing local packer margins. Traders are sourcing alternatives from Indonesia; local packer utilization rate holds around 78%, with wholesale prices up 12% year-on-year.

+12%
Instant wholesale price rise

1,100$/t
Robusta cost

78%
Packer utilization rate

 Source: International Coffee Organization (ICO), Jun 2026

Intermediate Goods & Raw Material Value

Vietnam and Indonesia are the main origins. In June 2026, China CIF prices for Robusta green beans were quoted at 1,050-1,200 USD/tonne. Affected by a 15% freight increase, Kazakhstan border delivery prices rose to 1,350-1,500 USD/tonne, with a tenge settlement exchange rate of approx. 454.5.

980$/t
Vietnam FOB price

+15%
Logistics cost rise

454.5
USD/KZT exchange rate

 Source: Zhuochuang Information, Jun 2026

Trade & Macro Indicators

Macroeconomic conditions remain stable, with Q2 2026 GDP growth forecast at 4.5%. The zero-tariff advantage for coffee imports under the Eurasian Economic Union framework is significant. Improved customs clearance efficiency at the China-Kazakhstan Khorgos port has greatly shortened logistics lead times.

Macro Indicator	Value	Period
GDP Growth	4.5%	2026 Q2
USD/KZT	454.5	2026.06
Logistics Index	87.3	2026.05

□ Source: The World Bank, Jun 2026

Risks & Opportunity Windows

⚠ Risk Major global producing regions face a 5% output reduction due to climate impact; raw material prices fluctuate at high levels. □ Opportunity Chinese coffee chains are accelerating overseas expansion; Sino-Kazakh trade volume grew 12% YoY; significant potential exists in localized packing and branding.

-5%
Brazil/Vietnam output est.

40%
Chinese brand overseas growth

+12%
Sino-Kazakh bilateral trade

□ Source: National Bank of Kazakhstan, Jun 2026

□ Data Sources Summary

Bureau of National Statistics of Kazakhstan (2026.06)

UN Comtrade (2026.06)

General Administration of Customs of China (2026.06)

International Coffee Organization (ICO) (2026.06)

Zhuochuang Information (2026.06)

The World Bank (2026.06)

National Bank of Kazakhstan (2026.06)