Kazakhstan Livestock Products Overseas Market Analysis Report

Report Updated: June 22, 2026

Target Country: Kazakhstan

Main Category: Livestock Products

Report Type: Overseas Market Analysis

Kazakhstan Livestock Core Conclusion

In the first half of 2026, Kazakhstan's livestock supply and demand are generally stable, with beef production steadily growing to about 600,000 tonnes and mutton export potential gradually being released. China's quarantine policies for meat imports from Kazakhstan continue to relax, and bilateral livestock product trade value increased by about 12% year-on-year. ⚠ **Attention** Regional FMD prevention pressure and tenge exchange rate fluctuations impact export competitiveness. Core judgment: Kazakhstan's livestock products present structural substitution opportunities in the Chinese market, particularly in the mid-to-high-end beef and mutton segments.

2026 Q1 Beef Output ~152,000 tonnes ▲3.1%

Livestock Trade with China YoY +12%

Key Risks FMD/FX/Logistics

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

Supply & Demand Fundamentals

Livestock production accounts for approximately 42% of Kazakhstan's total agricultural output. Full-year 2025 beef output was about 585,000 tonnes, mutton about 220,000 tonnes, and horse meat about 160,000 tonnes. Domestic consumption is dominated by beef and mutton, while exports focus on mutton and live animals. Import dependency is low, mainly small volumes of poultry meat and high-end dairy products.

Indicator	2024	2025	2026 Q1
Beef Output (10k tonnes)	56.8	58.5	15.2
Mutton Output (10k tonnes)	21.2	22.0	5.8
Horse Meat Output (10k tonnes)	15.5	16.1	3.9
Livestock Share of Agriculture	41.5%	42.1%	—

Source: Kazakhstan Bureau of National Statistics, Apr 2026; FAO Statistics Database, Mar 2026

China Market Status

China's domestic beef and mutton market saw moderate prices in H1 2026, with average wholesale beef prices around 78–82 CNY/kg and mutton around 72–76 CNY/kg. Imported beef still accounts for about 25% of consumption, mainly from Brazil, Argentina, and Australia. Although imports from Kazakhstan start from a small base, growth is remarkable, increasing by about 18% year-on-year from January to May 2026.

China Beef Wholesale Avg. 79.5 CNY/kg

Imported Beef Share ~25%

KZ Import Growth Rate YoY +18%

Source: China Ministry of Agriculture and Rural Affairs, Jun 2026; China Customs, Jun 2026; Sublime China Info, Jun 2026

Kazakhstan Market Status

Domestic retail beef and mutton prices in Kazakhstan remained stable. In June 2026, average beef prices were about 2,200–2,500 KZT/kg (approx. 34–39 CNY), and mutton about 1,900–2,200 KZT/kg. Import dependency is extremely low, with main suppliers being Russia and Belarus (poultry and dairy). Domestic consumption is dominated by fresh meat; processed meat products account for less than 15%.

Category	Retail Price (KZT/kg)	Approx. CNY
Beef	2,200-2,500	~34-39
Mutton	1,900-2,200	~30-34
Horse Meat	2,600-2,900	~40-45

Source: Kazakhstan Bureau of National Statistics, Jun 2026; Kazakh Zerno, May 2026

Product Segment Structure

Kazakhstan's livestock export structure is dominated by live animals, frozen beef and mutton, wool, and leather. In 2025 exports to China, frozen mutton accounted for about 38%, live cattle about 22%, horse meat products about 15%, and wool & leather combined about 18%. Exports of high-end organic beef and mutton are growing rapidly, with Q1 2026 year-on-year growth exceeding 25%.

Segment	Share of Exports to China	2026 Q1 YoY
Frozen Mutton	38%	+14%
Live Cattle	22%	+9%
Horse Meat Products	15%	+21%
Wool & Leather	18%	+6%

Source: China Customs, Jun 2026; Kazakhstan Ministry of Agriculture Foreign Trade Report, Apr 2026

Core Finished Product S&D

Frozen beef and mutton are Kazakhstan's core export finished products. In H1 2026, frozen beef exports reached about 38,000 tonnes and frozen mutton about 52,000 tonnes. Domestic frozen meat inventory remained at a moderate level of about 45,000 tonnes. Regarding export prices, frozen beef FOB is about USD 4,200/tonne and mutton about USD 3,800/tonne, slightly up 2-3% from end-2025.

Frozen Beef Export Volume ~38,000 tonnes (H1)

Frozen Beef FOB Price USD 4,200/tonne

Domestic Frozen Inventory ~45,000 tonnes

Source: Argus Media Agriculture Market Report, Jun 2026; Kazakhstan Customs Data, May 2026

Intermediate & Raw Material Value

Feed ingredients constitute the core cost item in livestock production. In June 2026, domestic barley prices in Kazakhstan were about USD 55–60/tonne and wheat bran about USD 40–45/tonne. CIF China prices for imported feed-grade alfalfa hay are about USD 320–350/tonne. Live cattle procurement prices (Kazakhstan origin) are about USD 1.8–2.0/kg live weight, with overall manageable cost transmission pressure.

Intermediate Product	KZ Origin Price	China CIF Reference
Barley (Feed Grade)	55-60 USD/tonne	—
Live Cattle Procurement	1.8-2.0 USD/kg	—
Alfalfa Hay (Imported)	—	320-350 USD/tonne

Source: FAO Price Monitoring, Jun 2026; China Feed Industry Info, Jun 2026; Mysteel Agricultural Products, May 2026

Trade & Macro Indicators

Kazakhstan's GDP growth in 2025 was about 4.6%, and Q1 2026 is estimated to remain around 4.3%. The KZT/CNY exchange rate is about 1 CNY ≈ 63.5 KZT (June 2026), depreciating about 2.8% from the beginning of the year. Bilateral livestock product trade between China and Kazakhstan reached about USD 820 million in 2025 and is expected to exceed USD 900 million in 2026. Kazakhstan provides VAT incentives and logistics subsidies for livestock product export enterprises.

2025 GDP Growth 4.6%

FX (CNY/KZT) 1:63.5 ▲ Depreciation 2.8%

Bilateral Livestock Trade ~USD 820M (2025)

Source: World Bank, Apr 2026; National Bank of Kazakhstan, Jun 2026; China Customs, Jun 2026

Risks & Opportunity Windows

Risks: Animal diseases such as foot-and-mouth disease remain the key bottleneck constraining meat export expansion to China; tenge exchange rate volatility impacts export profits; Central Asian logistics corridor (railway cold chain) capacity faces seasonal tightness. Opportunities: China continues to expand the scope of meat quarantine access for Kazakhstan; certified organic beef and mutton enjoy significant premiums (30-50% higher than conventional products); upgraded cold chain infrastructure at the China-Kazakhstan border provides hardware support for bilateral trade. ⚠ It is recommended to monitor the policy adjustment window for China's imported meat quarantine in H2 2026.

> Opportunity Alert: The expansion of the Khorgos Gateway cold chain logistics center was completed in Q2 2026, with annual handling capacity expected to increase by 40%. Organic beef and mutton exports to China command a 30-50% price premium.

Source: Kazakhstan Ministry of Agriculture, May 2026; World Organisation for Animal Health (WOAH), Jun 2026; China Ministry of Commerce, Apr 2026

Data Sources Summary

- Bureau of National Statistics, Agency for Strategic Planning and Reforms of the Republic of Kazakhstan — Data released Apr–Jun 2026
- General Administration of Customs of the People's Republic of China — Monthly Import/Export Statistics, June 2026
- Food and Agriculture Organization of the United Nations (FAO) Statistics Database — Updated March 2026

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- National Bank of Kazakhstan Exchange Rate Bulletin — June 2026
- China Feed Industry Information Network — June 2026
- Kazakh Zerno Grain & Livestock Information Platform — May 2026