Report Update Date: June 22, 2026

Kazakhstan Pesticide Overseas Market Analysis Report

Target Country: Kazakhstan | Main Category: Pesticides | Data as of: Q1-Q2 2026

Kazakhstan Pesticide Market Key Takeaways

Kazakhstan's pesticide market is heavily import-dependent (import dependency ~85%), with China firmly holding the top supplier position. In 2025, total imports reached approximately US$292 million, with herbicides accounting for 58%. Amid falling global technical-grade prices and tenge volatility, end-user prices show a stable-to-slightly-declining trend. Key risks lie in exchange-rate uncertainty and the pace of localization policy implementation.

Key Indicator	Value	Trend
Import Dependency	~85%	↑ High
Total Imports 2025	US$292M	▼ YoY -3.2%
China's Supply Share	~36%	▲ Steady growth
USD/KZT Exchange Rate	~485 KZT/USD	⚠ Increased volatility

Source: National Bureau of Statistics of Kazakhstan, General Administration of Customs of China, Q1 2026 data; Exchange rate: National Bank of Kazakhstan, May 2026

Supply and Demand Fundamentals

Kazakhstan's annual pesticide demand is about 42,000 tonnes (commercial product). Domestic production capacity is severely insufficient, meeting only ~15% of demand. In 2025, imports were approximately 35,800 tonnes, mainly for grains (wheat 65%), cotton and oil crops. The supply gap is filled by imports from China, Russia and the EU.

Item	2024	2025	YoY
Domestic Demand (10,000 t)	4.08	4.22	+3.4%
Domestic Production (10,000 t)	0.61	0.64	+4.9%
Imports (10,000 t)	3.47	3.58	+3.2%
Import Dependency	85.0%	84.8%	~Flat

Source: Ministry of Agriculture of Kazakhstan, UN Comtrade, 2025 data; Domestic production based on FAO estimates

China Market Status

China's pesticide technical-grade market had an average capacity utilization rate of about 68% in Q1 2026, while glyphosate technical prices remained at low levels. In 2025, China's pesticide exports to Kazakhstan reached approx. US$105 million, up 6.8% YoY, with major products being glyphosate, lambda-cyhalothrin and tebuconazole formulations.

China Indicator	Value	Change
Glyphosate Technical Avg. Price	RMB 24,500/t	▼ YoY -11%
Industry Capacity Utilization	~68%	QoQ +3pct
Exports to Kazakhstan (2025)	US$105M	▲ +6.8%
Share of National Pesticide Exports	~1.2%	Slight increase

Source: Longzhong Info pesticide monthly report May 2026, China Customs 2025 export statistics; Capacity utilization: Sublime China Info Q1 2026

Kazakhstan Market Status

End-user pesticide prices in Kazakhstan are influenced by both import costs and exchange rates. In Q1 2026, the retail price of a glyphosate formulation (41% IPA salt) was approx. 8,500–9,200 KZT/litre, down 4% YoY. Import sources are China (36%), Russia (28%) and the EU (18%). Southern agricultural regions account for the highest consumption.

Local Market Indicator	Value	Remarks
Glyphosate Retail Price	8,500–9,200 KZT/L	Q1 2026 Avg.
Top 3 Import Sources	China 36%, Russia 28%, EU 18%	2025 import value share
Southern Consumption Share	~42%	Main grain/cotton area
Import Tariff	0-5% (EAEU uniform rate)	Most pesticides zero-rated

Source: National Bureau of Statistics of Kazakhstan 2025 trade data, local distributor quotes (March 2026 sampling); EAEU tariff database

Product Mix Breakdown

Kazakhstan's pesticide imports are dominated by herbicides, which accounted for 58% of total imports in 2025, followed by insecticides (24%) and fungicides (16%). Glyphosate is the largest single product with annual imports of about 11,000 tonnes. Among insecticides, pyrethroids hold the highest share, while triazoles dominate fungicides.

Sub-category	Import Share	2025 Import Volume	Price Trend
Herbicides (Glyphosate, etc.)	58%	~20,800 t	▼ Slight decline
Insecticides (Pyrethroids, etc.)	24%	~8,600 t	→ Stable
Fungicides (Triazoles, etc.)	16%	~5,700 t	▲ +2%
Others (Growth regulators, etc.)	2%	~700 t	Stable

Source: UN Comtrade HS3808 classification data, Kazakhstan Customs 2025 report; Price trend: China Crop Protection Industry Association Q1 2026 brief

Core Finished Product Supply & Demand

Glyphosate formulations are the most critical finished pesticide product in Kazakhstan, with annual demand of about 13,000 tonnes (commercial product), almost entirely met by imports. In 2025, China's glyphosate exports to Kazakhstan were ~6,200 tonnes, accounting for 56% of Kazakhstan's glyphosate imports. End-user inventory cycles average 45–60 days.

Glyphosate S/D Indicator	2024	2025
KZ Demand (10,000 t)	1.25	1.31
Total Imports (10,000 t)	1.18	1.24
China's Supply (10,000 t)	0.58	0.62
CIF Avg Price (USD/t)	3,850	3,520

⚠ Note: Q1 2026 glyphosate CIF price further dropped to about USD 3,280/t, a four-year low.

Source: China Customs export data, Argus Media Pesticide Price Index March 2026; Kazakhstan demand based on Ministry of Agriculture plant protection statistics

Intermediates & Raw Material Value

Pesticide technical costs are significantly influenced by upstream raw materials such as glycine and yellow phosphorus from China. In Q1 2026, glycine average price fell to RMB 9,200/tonne (YoY -15%), while yellow phosphorus was about RMB 23,500/tonne. Downward raw material costs have passed through to CIF prices; China's glyphosate technical FOB quotation is around USD 2,800/tonne.

Raw Material / Intermediate	China Producer Price	KZ Indicative CIF
Glycine	RMB 9,200/t	— (intermediate, not directly imported)
Yellow Phosphorus	RMB 23,500/t	—
Glyphosate Technical FOB	USD 2,800/t	USD 3,280/t (CIF Almaty)
Lambda-cyhalothrin	RMB 185,000/t	~USD 21,500/t (CIF)

Source: 100ppi.com May 2026 chemical raw material quotes, Longzhong Info Q1 2026 pesticide technical export prices; Kazakhstan CIF reference from local importer quotes

Trade & Macro Indicators

Kazakhstan's GDP growth in 2025 was about 4.3%, with agriculture accounting for ~5.1% of GDP. Pesticide imports represented ~12% of agricultural input imports. Under the EAEU framework, pesticides enjoy preferential import tariffs, and bilateral trade between China and Kazakhstan continues to grow. The USD/KZT exchange rate fluctuation is a key variable affecting import costs.

Macro Indicator	Value	Source/Date
GDP Growth	4.3% (2025)	World Bank, April 2026
Agriculture % of GDP	5.1%	National Bureau of Statistics of KZ, 2025 report
USD/KZT Exchange Rate	≈485	National Bank of KZ, May 2026
Pesticide Imports (2025)	US$292M	UN Comtrade
China-KZ Bilateral Trade	~US$41B (2025)	China Customs

Source: World Bank, National Bank of Kazakhstan, China Customs, data as of Q1 2026 public updates

Risks & Opportunity Windows

Exchange rate volatility of the tenge is the biggest short-term risk, which could significantly increase import costs. ⚠ Geopolitical Risk The Russia-Ukraine situation indirectly affects Central Asian logistics routes. On the opportunity side, the Kazakh government is promoting local pesticide production (published the "Agrochemical Industry Development Outline" in 2025), creating opportunities for Chinese companies to explore joint-venture manufacturing and formulation technology transfer.

Key Risks:

- Tenge depreciation pressure (Q1 2026 depreciated 3.2%)
- Competition from low-priced Russian pesticides
- Stricter EAEU regulations (new MRL standards in 2026)

Opportunity Windows:

- "Agrochemical Industry Development Outline" encourages local formulation processing
- Tax incentives in the China-Kazakhstan Horgos border cooperation zone
- Bio-pesticide demand growth rate reaches 12% p.a.

Source: Ministry of Agriculture of Kazakhstan 2025 policy document, Commercial Office of Chinese Embassy in Kazakhstan Q1 2026 briefing; Exchange rate: National Bank of KZ

Data Sources

- National Bureau of Statistics of the Republic of Kazakhstan (stat.gov.kz) — 2025 trade and agricultural data
- General Administration of Customs of China — 2025 pesticide export statistics and China-Kazakhstan trade data
- UN Comtrade — HS3808 pesticide import classification data
- World Bank — Kazakhstan GDP and economic growth data
- Longzhong Information (oilchem.net) — China pesticide technical prices and capacity utilization (Q1 2026)
- 100ppi.com — Chemical raw material price monitoring (May 2026)
- Argus Media — Pesticide price index (March 2026)
- National Bank of Kazakhstan — Exchange rate data (May 2026)
- Ministry of Agriculture of Kazakhstan — Plant protection statistics and policy documents
- China Crop Protection Industry Association — Q1 2026 industry brief