

Kazakhstan Agricultural Machinery Overseas Market Analysis Report

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Kazakhstan Agricultural Machinery Core Conclusions

Kazakhstan's agricultural machinery market is over 85% import-dependent, with imports totaling approximately US\$850 million in 2024. Russia remains the largest supplier, but China's share continues to climb to about 18%. The Kazakh government's "Agricultural Machinery Renewal Plan" is increasing subsidies, with strong procurement demand in 2025-2026. Core risks lie in tenge exchange rate fluctuations and adjustments to Eurasian Economic Union tariff policies.

2024 Total Agricultural Machinery Imports: **~US\$850M** ↑12% YoY

China's Agricultural Machinery Exports to KZ: **~US\$230M** ↑18% YoY

⚠ Tenge depreciated ~7% against USD in Q1 2026, raising import costs; hedging strategies need attention.

Source: Bureau of National Statistics of Kazakhstan, General Administration of Customs of China, 2024 annual data, carried forward to June 2026

Supply & Demand Fundamentals

Apparent consumption in Kazakhstan's agricultural machinery market is approximately US\$950 million annually, with local production covering only about 15%, and the remainder dependent on imports. Local assembly output in 2024 was about US\$130 million, primarily concentrated in low-end tillage machinery. The supply-demand gap is concentrated in tractors and combine harvesters.

Indicator	2023	2024	YoY
Domestic Output (USD 100M)	1.15	1.30	+13%
Imports (USD 100M)	7.58	8.50	+12%
Apparent Consumption (USD 100M)	8.73	9.80	+12.3%
Import Dependence	86.8%	86.7%	Flat

Source: Bureau of National Statistics of Kazakhstan, Eurasian Economic Commission, released Jan 2025, carried forward to June 2026

Current Chinese Market Status

The total output value of China's agricultural machinery industry in 2024 was about RMB 4200 billion, with total exports of approximately US\$11.8 billion. Exports to Kazakhstan mainly consist of medium-sized tractors,

combine harvesters, and seeding machinery, amounting to approximately US\$230 million in 2024, accounting for about 2% of China's total agricultural machinery exports.

2024 Total Exports: ~US\$11.8B ↑15.5% YoY

Share of Exports to KZ: ~2.0% (Largest market in Central Asia)

Industry Operating Rate (H1 2025): ~72% → Stable

Source: China Association of Agricultural Machinery Manufacturers, General Administration of Customs of China, 2025 data; operating rate carried forward from prior value, no latest public data

Current Kazakhstan Market Status

Kazakhstan's agricultural machinery market is import-oriented, with imports totaling about US\$850 million in 2024. Russia accounts for ~38%, China 18%, Germany 13%, and Belarus 10%. Tractors are the largest category, accounting for ~42% of import value. Local retail prices carry a premium of ~18%-25% over CIF prices.

Source Country	2024 Imports (USD 100M)	Share
Russia	3.23	38%
China	1.53	18%
Germany	1.10	13%
Belarus	0.85	10%

Source: Bureau of National Statistics of Kazakhstan, Eurasian Economic Commission Trade Database, published Q1 2025

Segmented Product Structure

Among Kazakhstan's agricultural machinery import categories in 2024, tractors hold the largest share (~42%), followed by combine harvesters (~24%), tillage and seeding machinery (~18%), and plant protection and other machinery (~16%). China has prominent advantages in the tillage machinery and small-to-medium tractor segments.

Segment Category	2024 Imports (USD 100M)	China Share	Demand Trend
Tractors (Wheeled/Crawler)	3.57	~15%	↑ Strong
Combine Harvesters	2.04	~10%	↑ Growing
Tillage & Seeding Machinery	1.53	~28%	↑ Fast
Plant Protection/Irrigation & Others	1.36	~20%	→ Stable

Source: Eurasian Economic Commission, Bureau of National Statistics of Kazakhstan classified trade data, 2025

Core End-Product Supply & Demand

Tractors are the largest consumption category in Kazakhstan's agricultural machinery sector, with annual demand of approximately 12,000-15,000 units (including new purchases and renewal). Local assembly capacity is about

2,500 units/year, with the gap dependent on imports. Annual demand for combine harvesters is about 3,000-4,000 units, almost entirely imported. The supply-demand gap is driving continued price increases.

Annual Tractor Demand: **12k-15k Units** Local capacity covers only ~18%

Annual Combine Harvester Imports: **~3,200 Units** ↑18% YoY

⚠ Drought in southern Kazakhstan in 2026 may trigger a surge in irrigation equipment demand, straining short-term supply.

Source: Ministry of Agriculture of Kazakhstan, Eurasian Economic Commission, 2025 data; 2026 drought warning from Kazakh mainstream media

Intermediate Goods & Raw Material Values

Core raw material steel accounts for ~35%-45% of agricultural machinery costs. Chinese HRC quotes were about RMB 3,850/ton in June 2026 (FOB Tianjin). Imported steel CIF prices in Kazakhstan range from US\$520-560/ton. Key components like diesel engines and hydraulic parts are also highly import-dependent, with significant cost transmission effects.

China HRC (FOB Tianjin): **~RMB 3,850/ton** → Narrow fluctuation

Kazakhstan Imported Steel CIF: **US\$520-560/ton**

Diesel Engine (Chinese-made, 80HP): **~US\$4,500/unit** Export quote stable

Source: Mysteel steel prices (June 2026), SunSirs; engine prices carried forward from prior value, no latest public data

Trade & Macro Indicators

Kazakhstan's GDP growth rate in 2025 is expected to be about 3.8%, with agriculture accounting for about 4.6% of GDP. The USD/KZT exchange rate in June 2026 is about 1 USD = 495 KZT (depreciating ~7% from the start of the year). Most categories of agricultural machinery imports enjoy zero or low tariff preferences under the Eurasian Economic Union framework.

Indicator	Value	Notes
GDP Growth Rate (2025)	3.8%	World Bank Data
Agriculture as % of GDP	4.6%	KZ Bureau of National Statistics
USD/KZT Rate (2026.6)	~495	Annual depreciation ~7%
Agri-Machinery Import Tariffs	0-5%	EAEU Framework Preferences

Source: World Bank, National Bank of Kazakhstan, Eurasian Economic Commission, June 2026

Risks & Opportunity Window

Geopolitically, the ongoing Russia-Ukraine conflict continues to affect the stability of Russian agricultural machinery supply, creating a window for China to expand its market share. Regarding exchange rate risk, tenge

depreciation pushes up import costs, but the cost-performance advantage of Chinese products partially offsets this pressure. Kazakhstan's "Agricultural Machinery Renewal Subsidy Program" budget increased to approximately US\$320 million for 2025-2027, creating significant opportunities for localized assembly cooperation.

KZ Agri-Machinery Subsidy Budget (2025-2027): **~US\$320M** ↑ Significant growth

China Agri-Machinery Cost Advantage: **25-35% lower than EU products**

⚠ Risk of Russian supply volatility persists; Chinese brands need to accelerate localized service network development.

Source: Ministry of Agriculture of Kazakhstan policy announcements, industry assessments, 2025-2026

Data Sources Summary

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| <ul style="list-style-type: none">• Bureau of National Statistics of Kazakhstan• General Administration of Customs of China — Trade Statistics• Eurasian Economic Commission (EEC) Trade Database• World Bank — Kazakhstan Macroeconomic Data• National Bank of Kazakhstan — Exchange Rate Data | <ul style="list-style-type: none">• China Association of Agricultural Machinery Manufacturers (CAAMM)• Mysteel (Shanghai Ganglian) — Steel Price Data• SunSirs — Commodity Raw Material Prices• Ministry of Agriculture of Kazakhstan — Agricultural Machinery Renewal Plan Policy Documents• Food and Agriculture Organization of the United Nations (FAO) — Agricultural Mechanization Statistics |
|---|---|

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