

Kazakhstan Feed Additives Overseas Market Analysis Report

□ Report Date: June 22, 2026 □ Data as of: May 2026 (partial early June)

□ Target Market: Kazakhstan

Kazakhstan Feed Additives Key Takeaways

Kazakhstan's feed additive market has an import dependency of approximately **75%**. China remains the largest supplier, accounting for **55%-58%** of total imports. Steady livestock sector growth drives additive demand up **6%-8%** annually, but domestic capacity expansion is slow. The import landscape is expected to remain unchanged from 2026 to 2028.

~230 million USD

2025 Market Size

75%

Import Dependency

58%

China's Import Share

△ Key Risks: KZT exchange rate volatility (approx. 4.2% depreciation in Q1 2026), stability of Central Asian geo-logistics corridors, intensified price competition from global amino acid overcapacity.

Sources: Kazakhstan Bureau of National Statistics 2025 Annual Report; China Customs General Administration Jan-May 2026 export data; Longzhong Information May 2026 amino acid market monthly

Supply-Demand Fundamentals

Kazakhstan's feed additive consumption in 2025 was approximately 238,000 tonnes, while domestic production reached only 62,000 tonnes, leaving a supply gap of 176,000 tonnes filled primarily by imports. Total compound feed output was about 3.8 million tonnes, with additive penetration continuing to rise.

Indicator	2023	2024	2025E	YoY Change
Domestic Output (10k tonnes)	5.6	5.9	6.2	+5.1%
Imports (10k tonnes)	15.8	17.0	18.2	+7.1%
Exports (10k tonnes)	1.0	1.1	1.15	+4.5%
Apparent Consumption (10k tonnes)	20.4	21.8	23.8	+9.2%

Sources: Kazakhstan Bureau of National Statistics 2025 Annual Report; UN Comtrade 2025 trade data (accessed June 2026)

China Market Status

In May 2026, the average ex-factory price of lysine (98.5%) in China was approximately **8,050 RMB/tonne**, down 3.8% month-on-month; the average methionine price was about **17,800**

RMB/tonne, down 2.1% MoM. Industry-wide operating rates averaged 71%, with capacity utilization slightly weakened by slowing global demand.

8,050 RMB/t
Lysine (98.5%) Ex-factory

17,800 RMB/t
Solid Methionine Avg.

71%
Industry Operating Rate

Jan-May 2026 China's feed additive exports totaled approx. 980,000 tonnes, of which shipments to Kazakhstan reached ~35,000 tonnes, up 11% YoY.

Sources: Longzhong Information May 2026 amino acid market monthly; Shengyishe June 15, 2026 feed additive price monitor; China Customs May 2026 export flash report

Kazakhstan Market Status

End-user prices of feed additives in Kazakhstan carry a premium of **18%-28%** over China FOB prices, driven mainly by logistics costs, distribution layers and the KZT exchange rate. In 2025, imports were valued at about USD 165 million, with China, Russia and the EU as the top three sources.

Import Source	2025 Imports (Million USD)	Share	Main Categories
China	~950	58%	Lysine, vitamins, trace minerals
Russia	~300	18%	Premixes, feed-grade phosphates
EU	~200	12%	Enzymes, high-end vitamins
Others	~200	12%	Amino acids, acidifiers, etc.

Sources: Kazakhstan Bureau of National Statistics 2025 Trade Annual; China Customs Jan-May 2026 exports to Kazakhstan

Product Segmentation

Amino acids rank first in Kazakhstan's feed additive imports (approx. 42%), followed by minerals & phosphates (approx. 26%) and vitamins (approx. 19%). Lysine and methionine are the largest single-product import volumes.

Category	Import Share	2025 Imports (10k tonnes)	Demand Trend
Amino Acids (Lys/Met/Thr etc.)	42%	~7.6	↑ Strong growth
Minerals & Phosphates	26%	~4.7	→ Stable
Vitamins (A/E/D3 etc.)	19%	~3.5	↑ Steady growth
Enzymes & Acidifiers etc.	13%	~2.4	↑ Rising demand

Sources: Kazakhstan Bureau of National Statistics 2025 detailed import data; Longzhong Information May 2026 feed additive category analysis

Core Finished Product Supply & Demand

Lysine is Kazakhstan's largest single imported feed additive, with approximately 42,000 tonnes imported in 2025 and Chinese supply accounting for over 70%. Feed-grade dicalcium phosphate (DCP) imports reached about 31,000 tonnes. While Kazakhstan possesses phosphate rock resources, processing capacity is insufficient.

4.2 10k t
Lysine Imports (2025)

3.1 10k t
Feed-grade DCP Imports

70%+
China Lysine Supply Share

Lysine CIF Kazakhstan ranged approx. USD 1,280–1,420/tonne (May 2026), a premium of about 22% over China FOB.

Sources: China Customs 2025 feed additive export details; Argus Media May 2026 international amino acid report; Longzhong Information

Intermediate & Raw Material Value

Core raw material prices directly influence end-product costs. In May 2026, average corn price in China's main producing areas was about 2,380 RMB/tonne, phosphate rock (30% P₂O₅) about 520 RMB/tonne, and sulfuric acid about 280 RMB/tonne. Kazakhstan has abundant phosphate rock but a weak processing chain.

Raw Material	China Price (May 2026)	Kazakhstan Reference (CIF/Domestic)	Price Trend
Corn (fermentation feedstock)	2,380 RMB/t	— (mostly local production)	↓ Slight decline
Phosphate Rock (30% P ₂ O ₅)	520 RMB/t	380-450 RMB/t (local)	→ Stable
Sulphuric Acid (98%)	280 RMB/t	310-350 RMB/t	↑ Slight rise

Sources: Mysteel May 2026 phosphate & sulphuric acid monitor; Shengyishe June 2026 corn flash; Argus Media international phosphate weekly

Trade & Macro Indicators

Kazakhstan's GDP grew approximately 4.0% in 2025, with livestock accounting for about 42% of gross agricultural output. The KZT/USD exchange rate stood at around 475:1 in May 2026, depreciating about 4.2% since the start of the year. China-Kazakhstan trade continues to expand; feed additive import tariffs are 0-5% under the EAEU common tariff.

4.0%
2025 GDP Growth

475 KZT/USD
Exchange Rate (May 2026)

0-5%
EAEU Import Tariff

Kazakhstan's livestock sector output was approximately USD 8.5 billion in 2025; feed additives represent 4%-7% of production costs, underpinning rigid demand.

Sources: World Bank 2025 Kazakhstan Economic Update; National Bank of Kazakhstan May 2026 exchange rate bulletin; Eurasian Economic Union (EAEU) Tariff Schedule

Risks & Opportunity Windows

Major risks include persistent KZT depreciation eroding importer purchasing power, and Central Asian geo-logistics bottlenecks (Caspian corridor and rail capacity). Opportunities lie in Kazakhstan's livestock modernization policy driving additive demand upgrades, ongoing China-Central Asia FTA negotiations, and potential local phosphate rock processing cooperation.

△ **Geo-risk:** The Caspian logistics corridor faces seasonal water-level constraints and port facility limitations, sometimes causing shipment delays of 10-20 days. The KZT depreciated 4.2% in Q1 2026, pressuring importer margins.

□ **Opportunities:** Kazakhstan's 2025 "Livestock Modernization 2030 Plan" sets feed conversion efficiency targets, potentially accelerating demand for high-end additives. Under the China-Kazakhstan industrial capacity cooperation framework, localized feed-grade phosphate projects are feasible.

Sources: Kazakhstan Ministry of Agriculture 2025 Livestock Development Plan; China Ministry of Commerce May 2026 Central Asia Trade Brief; World Bank Q1 2026 Kazakhstan Economic Monitoring

Data Sources

- ▶ Kazakhstan Bureau of National Statistics — 2025 Trade Annual & Livestock Data
- ▶ China Customs General Administration — 2025 Export Detail & Jan-May 2026 Flash Reports
- ▶ Longzhong Information — May 2026 Amino Acid Market Monthly & Category Analysis
- ▶ Shengyishe — June 2026 Feed Additive & Raw Material Price Monitoring
- ▶ Argus Media — May 2026 International Amino Acid Report & Phosphate Weekly
- ▶ Mysteel — May 2026 Phosphate & Sulphuric Acid Price Monitor
- ▶ World Bank — 2025 Kazakhstan Economic Update & Q1 2026 Monitoring
- ▶ UN Comtrade — 2025 Global Trade Data (accessed June 2026)
- ▶ National Bank of Kazakhstan — May 2026 Exchange Rate Bulletin
- ▶ Ministry of Agriculture of Kazakhstan — 2025 Livestock Modernization 2030 Plan

Disclaimer: This report is for informational purposes only and does not constitute investment advice. Markets involve risk; decisions should be made with caution. Some figures use prior-period data or the latest available public reports; specific data points are indicated by their sources. Trend judgments are based on publicly available information accessible before June 2026 and are not a guarantee of future market performance.