Overseas Market Analysis Report

Kazakhstan Agricultural Products Overseas Market Analysis Report

Target Country: **Kazakhstan** | Sector: **Agricultural Products** | Report Date: June 22, 2026

Kazakhstan Agricultural Products — Executive Summary

Kazakhstan's agricultural products market is characterized by ample supply. Total grain output for the 2025/26 season is estimated to remain above 22 million tons. China is a key export market, with sunflower oil, beef, and wheat shipments growing steadily. Lower fertilizer costs benefit agricultural production, but KZT exchange rate volatility and downward pressure on global grain prices pose key risks.

- Total grain output est. 2025/26: 22.5 million tons (YoY +3.2%)
- Agri-product exports to China (2025): approx. USD 1.86 billion, ↑15%
- Sunflower oil exports (2025): approx. 550,000 tons, China share over 40%
- Diammonium phosphate (DAP) China FOB: approx. USD 520–560/ton (May 2026)

Source: Kazakhstan Ministry of Agriculture, China GACC, Argus Media, Dec 2025–May 2026

Supply & Demand Fundamentals

Kazakhstan's agricultural supply and demand are generally balanced. Grain production exceeds domestic consumption and is clearly export-oriented. Wheat is the core crop, with 2025 output of approximately 16.8 million tons and exports of about 7.5 million tons. Oilseed (sunflower seed) output is rising steadily. Meat self-sufficiency is improving, but high-end beef still relies partly on imported breeding stock for genetic improvement.

Product	Output (10k tons)	Exports (10k tons)	Self-sufficiency
Wheat	1,680	750	130%+
Sunflower Seeds	115	42	105%
Beef	58	6.5	98%
Cotton	33	28	110%

Source: KazStat, FAO, 2025 annual data

China Market Status

China's domestic wheat prices remained stable in H1 2026, with Zhengzhou spot averaging around CNY 2,680/ton. Sunflower oil import demand is robust; China imported approximately 1.8 million tons in 2025, with Kazakhstan's share rising to about 22%. China's DAP operating rate held around 75%, and fertilizer export policy remains steady.

- China wheat spot avg. (Zhengzhou): CNY 2,680/ton (May 2026, flat MoM)
- China sunflower oil imports (2025): approx. 1.8 million tons, Kazakhstan share 22%
- China DAP operating rate: approx. 75% (Q1 2026, carryover)
- China beef imports from Kazakhstan (2025): approx. 38,000 tons, ↑28%

Source: Shengyishe, China GACC, Zhuochuang Info, May–Jun 2026

Kazakhstan Market Status

Domestic agricultural product prices in Kazakhstan have edged up moderately, driven by export demand. Wheat farm-gate prices are approximately USD 85–95/ton. Import dependency is relatively low; key imports include tropical fruits, some processed foods, and breeding livestock. China is Kazakhstan's largest agricultural export destination, accounting for about 35% of total agricultural exports.

- Kazakh wheat farm-gate price: USD 85–95/ton (May 2026, northern regions)
- Total agricultural exports (2025): approx. USD 5.3 billion, China share 35%
- Top destinations: China, Uzbekistan, Russia, Afghanistan, Iran
- Agriculture as % of GDP: approx. 4.8% (2025, World Bank)

Source: KazStat, World Bank, 2025–May 2026

Product Segmentation Structure

Kazakhstan's agricultural exports are dominated by grains and oilseeds, with meat exports growing fastest in recent years. The breakdown below reflects key structural changes in exports to China in 2025:

Segment	Exports to China (10k tons)	YoY Change	Price Trend
Wheat	62	+8%	Stable
Sunflower Oil	24	+18%	Slightly up
Beef (frozen)	3.8	+28%	Rising
Cotton	12	+5%	Slightly down

Source: China GACC, Kazakhstan Ministry of Agriculture, 2025 full-year data

Core Finished Products — Flour & Sunflower Oil

Flour is Kazakhstan's core processed product. Flour output in 2025 was approximately 4.2 million tons, of which about 1.8 million tons were exported, mainly to Afghanistan and neighboring Central Asian countries. The sunflower oil processing industry is expanding rapidly; refined oil output in 2025 was about 380,000 tons, with over 55% of finished oil exports going to China. Capacity utilization held around 78%.

- Flour output (2025): 4.2 million tons, exports 1.8 million tons
- Sunflower oil output (2025): 380,000 tons (refined), capacity utilization 78%
- Flour avg. export price: approx. USD 310/ton FOB (Q1 2026)
- Sunflower oil CIF China: approx. USD 980–1,050/ton (May 2026)

Source: KazStat, UN Comtrade, 2025–May 2026

Intermediate Goods & Raw Material Value

Fertilizers and feed are two core intermediate inputs for Kazakhstan's agriculture. China's phosphate fertilizer export prices are stable; Kazakhstan's landed import price for DAP is approximately USD 580–620/ton. Feed soybean meal is mainly imported from China and Russia; Kazakhstan's average import price in Q1 2026 was about USD 420/ton. For seeds, wheat seed self-sufficiency is high, but vegetable seed import dependency is approximately 65%.

Intermediate Good	China ex-works price	KZ landed import price	Trend
DAP	CNY 3,650/ton	USD 580–620/ton	Stable to soft
Urea	CNY 1,950/ton	USD 310–340/ton	Low range
Soybean meal (feed)	CNY 3,200/ton	USD 420/ton	Minor fluctuations

Source: Longzhong Info, Shengyishe, Argus Media, May–Jun 2026

Trade & Macro Indicators

China-Kazakhstan bilateral trade continues to grow, with total trade reaching USD 43.8 billion in 2025. Kazakhstan's GDP growth is approximately 4.2%, with significant growth in agricultural investment. The KZT/USD exchange rate fluctuates in the 460–480 range, affecting export competitiveness. Kazakhstan offers a zero-VAT preferential policy for agricultural product exports, encouraging deep-processed product shipments.

- China-Kazakhstan total trade (2025): USD 43.8 billion, ↑6.8%
- Kazakhstan GDP growth (2025): approx. 4.2% (World Bank)
- KZT/USD exchange rate: 468 KZT/USD (Jun 2026)
- Kazakh agri-export VAT: 0% preferential rate (deep-processed products)

Source: China GACC, World Bank, National Bank of Kazakhstan, 2025–Jun 2026

Risks & Opportunity Windows

Key risks: KZT exchange rate volatility may erode export margins; a global grain price downcycle could reduce Kazakhstan's wheat export revenue; Central Asian water resource disputes may affect cotton-growing regions. Opportunities: deepening China-Kazakhstan Belt and Road agricultural cooperation, expanding eligibility for Kazakh meat exports to China, and rising investment interest in sunflower oil deep-processing.

- FX Risk: KZT depreciated ~6% in 2025; H2 2026 trajectory warrants monitoring
- Policy Opportunity: China-Kazakhstan agricultural cooperation plan 2025–2030 rolling out, focusing on oilseed processing and meat
- Water Risk: Ongoing Syr Darya basin water allocation disputes affect southern cotton cultivation
- Localization Opportunity: Kazakhstan encourages foreign investment in agri-processing, with tax incentives up to 10 years

Source: Kazakhstan Ministry of Agriculture, World Bank, CAREC reports, 2025–2026

Data Sources

① KazStat (Kazakhstan Bureau of National Statistics) — Production, trade, and agricultural economic data, 2025 annual report

② China GACC (General Administration of Customs) — China-Kazakhstan bilateral trade and agricultural import/export data, 2025–May 2026

③ World Bank — GDP growth, agricultural share, macro indicators, 2025

④ Argus Media — International fertilizer prices (DAP, Urea) FOB/CFR quotes, May–Jun 2026

⑤ Shengyishe / Zhuochuang Info — China domestic wheat, fertilizer, soybean meal spot prices, May–Jun 2026

⑥ Longzhong Info — China phosphate fertilizer operating rates and ex-works prices, Q1–Q2 2026

⑦ FAO / UN Comtrade — Global agricultural trade flows, flour and oils trade data, 2025

⑧ Kazakhstan Ministry of Agriculture — Production estimates, export policies, and China cooperation plans, 2025–2026