

Kazakhstan Seed Overseas Market Analysis Report

• Target Country: Kazakhstan • Main Category: Seeds Report Updated: June 22, 2026

Kazakhstan Seed Core Conclusions

Diversified imports in Kazakhstan's seed market accelerated in 2026, with overall import dependence remaining above 55%. Vegetable seeds account for over 70% of imports, and corn seed demand growth reached 12%. China's supply share has steadily increased to about 18%, but faces competition from Russia and Turkey. Tenge exchange rate fluctuations and rising logistics costs are key risks, while local seed industry development policies open new windows for foreign cooperation.

- Seed Import Dependence: 55%-60% (2025 annual data, carried forward to June 2026)
- China Supply Share: **Approx. 18%**, ranked third among source countries
- Vegetable Seed Import Share: **Over 70%** ▲ High Dependence
- Corn Seed Demand Growth: **↑ 12% YoY**

Source: FAO Seed Trade Database (2025 Annual Report); Kazakhstan Ministry of Agriculture 2025 Agricultural Development Statistics; World Bank Agricultural Observation Report (2025 Q4)

Supply and Demand Fundamentals

Kazakhstan's total annual seed demand is around 380,000-420,000 metric tons, with domestic production meeting about 45% of the demand, the remainder relying on imports. Grain seeds (wheat, barley, corn) account for over 75% of total demand, representing the primary consumption area. In 2025, total seed imports were approximately 230,000 tons, exports were around 40,000 tons, resulting in a net import of roughly 190,000 tons, with the supply-demand gap persisting.

Indicator	Value	YoY Change
Annual Total Demand	380-420K tons	+3.2%
Domestic Production	~170K tons	+1.5%
Imports	~230K tons	↑ 6.8%
Exports	~40K tons	-2.1%

Source: Kazakhstan National Bureau of Statistics (2025 Agricultural Yearbook); FAO STAT Database (2025 update); figures carried forward, no latest monthly public data as of June 2026

China Market Status

China's seed industry total output value was approximately CNY 155 billion in 2025, with total exports of about USD 1.26 billion. Seed exports to Kazakhstan reached approximately USD 42 million, up 8.3% year-on-year, with market share continuing to expand in Kazakhstan. Vegetable seeds and hybrid corn seeds are the main export categories, featuring

strong price competitiveness. Domestic seed enterprise operating rates remain high, with capacity utilization at approximately 78%.

- China Seed Industry Output Value (2025): **Approx. CNY 155 billion**
- Seed Exports to Kazakhstan (2025): **Approx. USD 42 million, ↑ 8.3% YoY**
- Main Export Categories: Vegetable seeds (tomato, pepper, cucumber) accounting for 52%
- Domestic Seed Enterprise Capacity Utilization: **Approx. 78%** (2025 average)

Source: China General Administration of Customs (2025 Seed Export Statistics); China Seed Association 2025 Industry Development Report; figures carried forward, detailed monthly export data for June 2026 has not been released

Kazakhstan Market Status

Kazakhstan's annual seed imports amount to approximately USD 270-300 million, with structurally high import dependence. Wheat seed self-sufficiency is about 85%, but high-purity varieties still rely on imports; vegetable seed self-sufficiency is less than 30%. Major import sources are Russia (30%), the EU (20%), China (18%), and Turkey (12%). Affected by the Tenge depreciation, the landed cost of imported seeds has risen by about 7%-9%.

Source Country	Import Share	Main Categories
Russia	30%	Wheat seeds, Barley seeds
EU	20%	Vegetable seeds, Sunflower seeds
China	18%	Vegetable seeds, Corn seeds
Turkey	12%	Vegetable seeds, Melon seeds

Source: Kazakhstan Ministry of Agriculture Foreign Trade Statistics (2025 Annual); FAO Global Seed Trade Report (2025); figures carried forward as of June 2026, no latest monthly public data

Product Segmentation Structure

Kazakhstan's seed market is segmented into five major categories. Grain seeds (wheat, barley, corn) account for 76% of the total market volume, representing the absolute majority. Although vegetable seeds account for only 8%, they have the highest import dependence and significant added value. Sunflower and oilseed seeds account for 11%, with notable demand growth in recent years closely linked to the expansion of the edible oil processing industry.

Segment Category	Market Share	Import Dependence	Demand Trend
Wheat Seeds	48%	15%	Stable
Corn Seeds	16%	45%	↑ Growing
Vegetable Seeds	8%	72%	↑ Strong Growth
Sunflower Seeds	11%	35%	↑ Growing

Source: Kazakhstan Seed Association Industry Statistics (2025 Annual); FAO Category Trade Analysis Report (2025); figures carried forward as of June 2026

Core Finished Products Supply and Demand

The supply and demand of commodity wheat and corn, the core finished products downstream of seeds, directly influence seed demand. In 2025, Kazakhstan's wheat production was about 15.5 million tons, and corn production was about 1.2 million tons, both slightly higher than the previous year. Wheat exports were approximately 8 million tons, positioning Kazakhstan as a major global wheat exporter. Increased domestic flour milling capacity drives demand for high-quality wheat seeds, while growing corn feed demand boosts corn seed imports.

- Wheat Production (2025): **Approx. 15.5 million tons**, +2.1% YoY
- Corn Production (2025): **Approx. 1.2 million tons**, +4.8% YoY
- Wheat Exports (2025): **Approx. 8 million tons**
- Flour Milling Capacity Utilization: **Approx. 68%**, strong demand for high-quality wheat seeds

Source: Kazakhstan National Bureau of Statistics (2025 Agricultural Output Bulletin); World Bank Kazakhstan Agricultural Monitoring Report (2025 Q4); figures carried forward as of June 2026

Intermediates and Raw Materials Value

Key intermediate inputs for seed production include parent seeds/breeder materials, seed coatings, phosphate fertilizers, and nitrogen fertilizers. In Chinese production regions, the price of phosphate fertilizer (DAP) is around USD 580-620/ton FOB, with a landed price in Kazakhstan of approximately USD 650-690/ton. Import costs for parent seeds account for 30%-40% of total seed production costs. Fertilizer prices slightly retreated in the first half of 2026, which is beneficial for controlling seed production costs.

Input	China Production Price	KZ Landed Price
Diammonium Phosphate (DAP)	USD 580-620/ton	USD 650-690/ton
Urea	USD 340-370/ton	USD 400-430/ton
Vegetable Parent Seed (Tomato)	USD 120-180/kg	USD 150-220/kg

Source: Longzhong Information (June 2026 Phosphate/Urea Weekly Price Report); BusinessShe Chemical Channel (June 2026); parent seed prices from industry trader quotes, figures carried forward

Trade and Macro Indicators

Kazakhstan's GDP growth rate was approximately 4.6% in 2025, with agriculture accounting for about 5.2% of GDP. The KZT/USD exchange rate was around 468 Tenge/USD in June 2026, depreciating by about 3.5% from the beginning of the year. China-Kazakhstan agricultural trade benefits from zero-tariff or preferential tax rate policies, with a seed import VAT of 12%. In 2025, the Kazakh government launched the "Agricultural Import Substitution Plan," providing subsidies for localized seed production.

Indicator	Value	Notes
GDP Growth Rate	4.6%	Full Year 2025
Agriculture Share of GDP	5.2%	2025
KZT/USD Exchange Rate	468	June 2026 ▲ Depreciation Pressure
Seed Import VAT	12%	Reductions/exemptions available for some categories

Source: National Bank of Kazakhstan (June 2026 Exchange Rate Data); World Bank (2025 GDP Data); Kazakhstan Ministry of Finance Tariff Policy Announcement (2025)

Risks and Opportunity Windows

Key risks include: continued Tenge depreciation increasing import costs, disruption of Russian supply due to geopolitical factors, and logistics transit uncertainties. Opportunity windows lie in: the Kazakh "Agricultural Import Substitution Plan" encouraging localized foreign investment cooperation, the expanding cost-performance advantage of Chinese seeds in Central Asia, and improved China-Kazakhstan rail intermodal efficiency reducing logistics costs. Vegetable seeds and corn seeds are priority entry categories.

- Exchange Rate Risk:** 3%-5% annual Tenge depreciation increases importer costs ▲ Monitor
- Policy Opportunity:** Kazakhstan offers 30% investment subsidies for localized seed production
- Supply Chain Risk:** Russian transit logistics affected by geopolitical factors, highlighting the advantage of direct China-Kazakhstan transport
- Cooperation Window:** Seed trade enjoys tariff preferences under the China-Kazakhstan agricultural cooperation framework

Source: Kazakhstan Investment Authority (2025 Investment Policy Guide); PRC Ministry of Commerce China-Kazakhstan Economic and Trade Cooperation Report (2025 Annual); Eurasian Economic Union Tariff Policy Documents (2025 Revision)

Data Sources Summary

- FAO (Food and Agriculture Organization) Seed Trade Database — 2025 Annual Report
- Kazakhstan Ministry of Agriculture — 2025 Foreign Trade Statistics and Agricultural Development Report
- China Seed Association — 2025 Industry Development Report
- Longzhong Information — June 2026 Phosphate/Urea Weekly Price Report
- National Bank of Kazakhstan — June 2026 Exchange Rate Data
- PRC Ministry of Commerce — China-Kazakhstan Economic and Trade Cooperation Report (2025 Annual)
- Kazakhstan National Bureau of Statistics — 2025 Agricultural Yearbook and Output Bulletin
- China General Administration of Customs — 2025 Seed Export Statistical Annual Report
- World Bank — Kazakhstan Agricultural Monitoring Report (2025 Q4) and GDP Data
- BusinessShe — June 2026 Chemical Channel Price Data
- Kazakhstan Investment Authority — 2025 Investment Policy Guide
- Eurasian Economic Union — Tariff Policy Documents (2025 Revision)

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