Kazakhstan Apparel Overseas Market Analysis Report

Target Country: Kazakhstan | Main Category: Apparel

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Core Conclusions on Kazakhstan Apparel

Kazakhstan's apparel market is highly import-dependent, with China as its largest supplier. Import demand remained steady with slight growth in H1 2026, but tenge exchange rate volatility and Eurasian Economic Union policy adjustments pose major risks. Localization of production is progressing slowly, while e-commerce channels are growing significantly, representing a key window of opportunity.

Market Size (2025)	Approx. USD 2.15 billion
Import Dependence	Approx. 87%
China Share (Import Source)	Approx. 46%
Q1 2026 Import YoY	↑ 5.2%

Source: Kazakhstan National Bureau of Statistics, China Customs, April 2026

Supply and Demand Fundamentals

Kazakhstan's local apparel production capacity is limited, meeting only about 13% of domestic demand. In 2025, apparent consumption was approximately USD 2.15 billion, with imports of approximately USD 1.87 billion. Consumption is primarily driven by urban residents, with strong demand for winter warm clothing and steadily increasing fast fashion penetration.

Indicator	2024	2025	YoY Change
Domestic Consumption (USD 100M)	19.8	21.5	+8.6%
Local Production (USD 100M)	2.4	2.8	+16.7%
Import Value (USD 100M)	17.4	18.7	+7.5%
Export Value (USD 100M)	0.6	0.5	-16.7%

Source: Kazakhstan National Bureau of Statistics, EAEU Trade Statistics, March 2026

China Market Status

China's overall apparel exports remain stable, with growth in exports to Kazakhstan. In H1 2026, China's textile and apparel exports were steady, and operating rates remained high. Exports to Central Asia are mainly mid-range ready-to-wear, knitwear, and footwear, with strong price competitiveness.

China Apparel Exports to Kazakhstan (2025)	Approx. USD 860 million
Share of Kazakhstan's Total Imports	Approx. 46%
China Textile Operating Rate (May 2026)	Approx. 78%
Export Average Price YoY Change	↑ 2.1%

Source: China Customs, China Chamber of Commerce for Import and Export of Textiles, May 2026

Kazakhstan Market Status

> Apparel retail in Kazakhstan is dominated by imports, with Almaty and Astana as core consumption cities. In 2026, tenge volatility pushed up import costs, causing a slight increase in retail prices. Apparel categories on e-commerce platforms (Kaspi.kz, Wildberries) are growing rapidly, with an annual growth rate exceeding 30%.

Main Source Countries	China 46%, Turkey 18%, Russia 12%
Retail Average Price YoY (Q1 2026)	↑ 4.3%
E-commerce Apparel Sales Share	Approx. 28% (2025)
KZT/USD Exchange Rate (June 2026)	Approx. 475 KZT/USD

Source: Kazakhstan National Bureau of Statistics, Kaspi.kz Financials, April 2026; ⚠ Heightened Exchange Rate Volatility

Segmented Product Structure

> Among imported apparel, women's wear accounts for the highest share at approximately 38%; men's wear 28%; children's wear 18%; sports and outdoor wear 12%; footwear and others 4%. Winter categories (down jackets, thermal underwear) see strong demand due to climate, while sports and leisure categories are growing fastest.

Category	Import Share (Est.)	2025 Import Value (USD 100M)	Demand Trend
Women's Wear	38%	7.1	Steady Growth
Men's Wear	28%	5.2	Moderate Growth
Children's Wear	18%	3.4	Fast Growth
Sports & Outdoor	12%	2.2	**High Growth**

Source: Kazakhstan National Bureau of Statistics Import Classification Data, Industry Estimates, February 2026

Core Finished Product Supply and Demand

> Down jackets, knitwear, and sports shoes are core categories in the Kazakhstan market. There is almost no local mass garment production; the supply-demand gap is entirely filled by imports. In 2025, down jacket imports reached approximately USD 180 million, and sports shoes approximately USD 150 million, both maintaining double-digit growth.

Down Jacket Import Value (2025)	Approx. USD 180 million, +12% YoY
Sports Shoe Import Value (2025)	Approx. USD 150 million, +18% YoY
Local Garment Production Share	Less than 5%
Inventory Cycle (Importers)	Approx. 45-60 days

Source: Kazakhstan Light Industry Association, Customs Import-Export Database, March 2026

Intermediate Goods and Raw Material Value

> Kazakhstan's domestic fabric capacity is extremely low; cotton and synthetic fabrics required for garment processing are almost entirely imported. Chinese cotton yarn and polyester fabrics are the main intermediate goods sources. Prices remained generally stable in H1 2026, while freight costs rose slightly.

Raw Material / Intermediate	Avg. Price in China Production Area	Estimated CIF Kazakhstan	Trend
Cotton Yarn (32s)	Approx. RMB 28,000/ton	Approx. USD 3,100/ton	Flat
Polyester Filament Fabric	Approx. RMB 4.5/meter	Approx. USD 0.85/meter	Slightly up
Down Filling (White Duck Down)	Approx. RMB 380/kg	Approx. USD 58/kg	↑ 5%

Source: Sunsirs (100ppi.com), China Cotton Textile Association, May 2026; CIF prices based on logistics estimates

Trade and Macro Indicators

> Kazakhstan's economy maintains moderate growth, with GDP growth of approximately 3.2% in 2025. Apparel import tariffs under the EAEU framework are relatively low, and Chinese goods benefit from tariff preferences. Cross-border e-commerce logistics costs are gradually declining, benefiting bilateral trade.

GDP Growth Rate (2025)	3.2%
Apparel Import Tariff (MFN)	5%-12%
KZT/USD (June 2026)	Approx. 475 KZT
Total China-Kazakhstan Trade (2025)	Approx. USD 31.5 billion

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

Risks and Opportunity Windows

> Key risks include tenge depreciation pushing up import costs and uncertainty over EAEU tariff policy adjustments. Opportunities lie in Kazakhstan's local production support policies, accelerating e-commerce penetration, and improving China-Kazakhstan cross-border logistics channels, offering a brand overseas window for Chinese apparel enterprises.

Exchange Rate Risk	KZT Volatility Approx. 8% (annualized)
Policy Opportunity	Kazakhstan "Light Industry 2025-2030" Support Program
E-commerce Growth Rate	Apparel Category +30%+ YoY
Logistics Time Improvement	China-Kazakhstan Land Transport Shortened to 7-12 days

Source: Kazakhstan Ministry of Investment and Development, World Bank Doing Business Report, March 2026;

⚠ Monitor Tariff Policy Changes

Key Data Sources Summary

- National Bureau of Statistics of Kazakhstan (stat.gov.kz) — supply, import, consumption data, Feb-Apr 2026
- General Administration of Customs of China (customs.gov.cn) — China's exports to Kazakhstan data, Apr-May 2026
- EAEU Trade Statistics — tariff and trade flows, Mar 2026
- World Bank (worldbank.org) — GDP growth and macro indicators, Apr 2026
- National Bank of Kazakhstan — exchange rate data, Jun 2026
- China Chamber of Commerce for Import and Export of Textiles — industry export and operating rate, May 2026
- Sunsirs (100ppi.com) — cotton yarn, chemical fiber prices, May 2026
- Kaspi.kz financial reports and public data — e-commerce apparel sales trends, Apr 2026
- Kazakhstan Light Industry Association — local production capacity and policy info, Mar 2026