Kazakhstan Home Textiles Overseas Market Analysis Report

Target Country: Kazakhstan | Category: Home Textiles | Report Type: Overseas Market Analysis

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Kazakhstan Home Textiles Core Conclusions

Kazakhstan's home textile market has an import dependence exceeding 80%, with China firmly established as the largest supplier (accounting for approximately 55%-60% of imports). The total market size in 2024 was approximately USD 420 million, with bedding as the core category. Exchange rate fluctuations and logistics costs are the primary risks, while a localization substitution window is gradually opening.

- Import dependence: Approx. 82%-85% (limited domestic capacity)
- China supply share: Approx. 55%-60% (2024 customs data)
- Market size: Approx. USD 420 million (2024 estimate)
- Core risks: KZT/USD exchange rate fluctuation ±12%, high logistics transit costs

Source: UN Comtrade, Kazakhstan Bureau of National Statistics, General Administration of Customs of China; Data period: Full year 2024

Supply and Demand Fundamentals

Kazakhstan's annual home textile demand is approximately USD 420 million, with domestic production meeting only 15%-18% of consumption. Imports are approximately USD 350 million, while exports are minimal. Primary consumption is concentrated in urban households, the hotel and catering industry, and new housing deliveries.

Indicator	Value	YoY Change
Total Demand	Approx. USD 420M	+6.5%
Domestic Production	Approx. USD 70M	+3%
Imports	Approx. USD 350M	+7.2%
Exports	Approx. USD 5M	-2%

Source: Kazakhstan Bureau of National Statistics, ITC Trade Map; Data period: 2024

China Market Overview

China's home textile industry exported approximately USD 210 million to Kazakhstan in 2024, a year-on-year increase of about 8%. Domestic cotton textile home textile capacity utilization remains at 78%-82%, with the Central Asian share of export orders continuing to rise. Pure cotton bedding sets are the top export category.

- Exports to Kazakhstan: Approx. USD 210M (2024)
- Capacity utilization: 78%-82% (2024 industry average)
- Export share change: Central Asia share rose from 4.2% to 5.1%
- Pure cotton bedding avg. export price: Approx. USD 6.8/kg (FOB China)

Source: General Administration of Customs of China, China Home Textile Association; Data period: Full year 2024

Kazakhstan Market Overview

Retail prices for home textiles in Kazakhstan are 30%-50% higher than in China, primarily driven by import tariffs (5%-12%), logistics costs, and distribution layers. Almaty and Astana are the two core consumption cities, together accounting for approximately 55% of national consumption.

- Retail premium: 30%-50% higher than China CIF price
- Import tariff: 5%-12% (by category, 2024 applicable rates)
- Core city share: Almaty + Astana Approx. 55%
- E-commerce penetration: Approx. 18% (2024, growing)

Source: Kazakhstan Bureau of National Statistics, local retail survey; Data period: 2024

Product Segment Structure

Bedding accounts for the largest import share (approx. 48%), followed by towel products (approx. 22%), and curtains & decorative fabrics in third (approx. 16%). Demand for cotton products is strong, while chemical fiber home textiles are growing faster in the mid-to-low-end market.

Segment	Import Share	Price Trend
Bedding	Approx. 48%	Stable-Slight Rise ↑2%
Towel Products	Approx. 22%	Stable →
Curtains & Decorative Fabrics	Approx. 16%	Slight Increase ↑1.5%
Kitchen Textiles	Approx. 9%	Stable →

Source: UN Comtrade classification statistics, ITC Trade Map; Data period: 2024

Core Finished Product Supply and Demand

Pure cotton bedding sets (HS 6302.21/6302.31) are the largest single import item, with annual imports of approximately USD 110 million. Kazakhstan has no large-scale bedding manufacturer, and the supply-demand gap is almost entirely filled by imports.

- Pure cotton bedding imports: Approx. USD 110M (2024)
- Domestic production share: Less than 5%

- Average import price (CIF): Approx. USD 7.5-8.2/kg
- Inventory turnover: Importers typically maintain 45-60 days of inventory

Source: Kazakhstan Customs, UN Comtrade; Data period: 2024

Intermediate Goods and Raw Material Value

Cotton yarn and polyester grey fabric are the core intermediate products for home textile production. China's cotton yarn price is approximately USD 2.8-3.2/kg, while Kazakhstan's intended import CIF price is approximately USD 3.5-4.0/kg (including freight and tariffs), with cost pass-through resulting in notable finished product premiums.

- China cotton yarn (32s): Approx. USD 2.9/kg (2024 avg. price)
- Polyester grey fabric (China): Approx. USD 1.5-1.8/m
- Kazakhstan CIF price (cotton yarn): Approx. USD 3.6-4.0/kg
- Cost pass-through rate: Raw materials account for Approx. 55%-65% of finished cost

Source: 100ppi.com, Mysteel Cotton Textile; Data period: 2024, carried forward as of June 2026

Trade and Macroeconomic Indicators

Kazakhstan's GDP growth rate in 2024 was approximately 4.8%, with home textile imports accounting for about 11% of light industry imports. The KZT exchange rate is highly volatile, and China-Kazakhstan bilateral trade benefits from Belt and Road tariff preference arrangements. The VAT on home textile imports is 12%.

Indicator	Value	Remarks
GDP Growth Rate	4.8%	2024
KZT/USD	Approx. 460 KZT/USD	2024 average
Home Textile Import Tariff	5%-12%	By category
VAT	12%	On import

Source: World Bank, Ministry of Finance of Kazakhstan; Data period: 2024

Risks and Opportunity Window

Key risks include KZT exchange rate volatility, uncertainty in Russia transit logistics, and the advancement of import substitution policies. Opportunities lie in severe domestic capacity shortages, Belt and Road corridor optimization, and branding potential driven by rising e-commerce penetration.

- ⚠ Exchange Rate Risk: KZT annual fluctuation can reach ±12%, impacting import costs
- ⚠ Logistics Risk: Russia transit routes affected by geopolitical factors

- √ Localization opportunity: Government encourages light industry investment, tax incentives up to 5 years
- √ E-commerce growth: Online home textile sales growth rate exceeding 25% annually

Source: Kazakh Invest, local industry research; Data period: 2024 - early 2025

Data Sources Summary

UN Comtrade
Bureau of National Statistics of the Republic of Kazakhstan
General Administration of Customs of China
ITC Trade Map
World Bank
China Home Textile Association
Ministry of Finance of Kazakhstan
100ppi.com / Mysteel Cotton Textile
Kazakh Invest