Kazakhstan Glass Raw Materials and Products Overseas Market Analysis Report

Target Country: Kazakhstan

Main Category: Glass Raw Materials and Products

Report Update: June 22, 2026

Kazakhstan Glass Raw Materials and Products Key Conclusions

Kazakhstan's glass market exhibits a pronounced feature of "limited domestic production capacity and high import dependency." China, as the largest supplier, holds a dominant position in key raw materials such as flat glass, glass containers, and soda ash. Sustained construction sector growth drives upward demand, but the complete reliance on imported soda ash constitutes a critical supply chain vulnerability. Coupled with exchange rate volatility risks, the process of local substitution remains slow.

Import Dependency (Flat Glass) **Approx. 68%-75%** High Dependency

China's Share in Kazakhstan Glass Imports **Approx. 52%-58%** Top Source Country

Soda Ash Self-Sufficiency Rate **≈0%** ⚠ Fully Import Dependent

2025 Kazakhstan Construction Sector Growth **+7.2%** ▲

Source: Kazakhstan Bureau of National Statistics, General Administration of Customs of China, World Bank, 2025 data carried forward to June 2026

Supply and Demand Fundamentals

Kazakhstan's annual glass market consumption is approximately 220-280 kilotons (flat glass equivalent), with domestic production meeting only about 30% of demand. The construction sector accounts for over 60% of consumption, while automotive and household appliances together make up about 20%. Import volume has grown at an average annual rate of 8%-10% over the past three years, with China, Russia, and Iran as the main source countries, among which China's share continues to expand.

Indicator	2024	2025	Trend
Apparent Consumption (kilotons)	24.5	27.1	▲10.6%
Domestic Production (kilotons)	7.8	8.2	▲5.1%
Net Imports (kilotons)	16.7	18.9	▲13.2%
Import Dependency	68.2%	69.7%	▲1.5pp

Source: Kazakhstan Bureau of National Statistics trade data, Argus Media market report, December 2025

China Market Status

China's glass industry maintained a capacity utilization rate of 82%-85% in 2025. Flat glass prices experienced low-level fluctuations due to downward pressure from the real estate sector. Soda ash prices declined in the second half of 2025, providing cost relief for glass production. China's glass exports to Kazakhstan maintained a growth trend, with Xinjiang ports serving as the main outbound channel.

Flat Glass Avg. Price (5mm, East China) **1,680-1,750 CNY/ton** → Low-level Fluctuation

Soda Ash Price (Light Ash, North China) **2,100-2,280 CNY/ton** ▼ YoY -8%

China Flat Glass Capacity Utilization **83.5%**

Glass Export Value to Kazakhstan (2025) **Approx. 185 million USD** ▲ YoY +11%

Source: SCI99, 100ppi.com, General Administration of Customs of China, December 2025 data carried forward to June 2026

Kazakhstan Market Status

Local glass processing enterprises in Kazakhstan are relatively small in scale, mainly concentrated around Almaty and Astana. The end-user price of flat glass is 40%-60% higher than in China, primarily due to the combined impact of transportation costs and import tariffs. Architectural glass accounts for the largest share of the consumption structure, while automotive glass demand is growing alongside the expansion of the local assembly industry.

Indicator	Value	Remarks
Flat Glass End-user Price	2,800-3,200 CNY/ton	Almaty market
Import Dependency	69.7%	2025 data
Top Source Country	China (54%)	By import value
Construction Consumption Share	62%	Largest consumption sector

Source: Kazakhstan Bureau of National Statistics, Kazakhstan Chamber of Commerce industry report, 2025 data

Segmented Product Structure

Imported glass products into Kazakhstan can be broken down into three core categories: flat glass, glass containers, and glass fiber. Flat glass has the largest import volume, mainly used for building curtain walls and doors/windows. Demand for glass containers is growing due to food and beverage packaging upgrades. Glass fiber benefits from demand for infrastructure composite materials.

Segment Category	Import Share	Annual Demand Growth	Main Application
Flat Glass	55%	+9%	Building curtain walls, doors/windows
Glass Containers & Bottles	25%	+7%	Food & beverage packaging
Glass Fiber & Products	14%	+12%	Composite materials, pipelines
Others (Specialty Glass, etc.)	6%	+5%	Automotive, household appliances

Source: China Customs HS code category statistics, Kazakhstan Customs import category report, 2025

Core Finished Product Supply & Demand

Flat glass is the finished product category with the largest supply-demand gap in Kazakhstan, with an annual shortfall of approximately 150-180 kilotons. The country's only float glass production line has limited capacity and unstable yield rates. In the glass container sector, Kazakhstan has three medium-sized bottle plants, but high-end cosmetic bottles and pharmaceutical glass are almost entirely imported, highlighting significant structural supply-demand issues.

Annual Flat Glass Gap **150-180 kilotons** ⚠ Gap Continues to Widen

Float Glass Domestic Capacity **Approx. 60 kt/year** Only 1 Production Line

High-end Pharmaceutical Glass Self-Sufficiency **<5%** ⚠ Almost Fully Imported

Source: Kazakhstan Ministry of Industry and Infrastructure Development industry report, Argus Media, December 2025

Intermediate Goods & Raw Material Value

Soda ash is the core raw material for glass production. Kazakhstan has no soda ash capacity and is 100% dependent on imports. The CIF price (Almaty) of Chinese-supplied soda ash carries a premium of approximately 30%-40% over the ex-factory price in China. Local silica sand resources are abundant, but high-purity processing capacity is insufficient. High-quality silica sand still needs to be imported from China, resulting in significant cost transmission pressure.

Raw Material / Intermediate	China Origin Price	Kazakhstan CIF/Indicative Price	Premium Range
Soda Ash (Light Ash)	2,100-2,280 CNY/ton	2,850-3,100 CNY/ton	+32%-38%
High-purity Silica Sand	480-620 CNY/ton	720-880 CNY/ton	+40%-50%
Glass Cullet (Recycled)	280-350 CNY/ton	Mainly local recycling	—

Source: Longzhong Info soda ash weekly report, 100ppi.com silica sand quotes, December 2025 data carried forward to June 2026

Trade and Macro Indicators

Kazakhstan's macroeconomy is progressing steadily with a GDP growth rate of 4.8% in 2025, driven by core investments in construction and infrastructure. Tenge-CNY exchange rate fluctuations significantly impact import costs. Sino-Kazakh trade benefits from preferential tariff arrangements under the Eurasian Economic Union framework, providing institutional convenience for glass trade.

Kazakhstan 2025 GDP Growth Rate **4.8%** World Bank Data

Construction Share of GDP **6.3%**

2025 Total Glass Imports **Approx. 320 million USD**

Tenge/CNY (Annual Average) **Approx. 62.5** → Fluctuation Range ±8%

Source: World Bank, National Bank of Kazakhstan, General Administration of Customs of China, full-year 2025 data

Risks and Opportunity Windows

Tenge exchange rate volatility is the primary risk for importers, with the Tenge-CNY amplitude reaching 15% in 2025. In terms of opportunities, the Kazakh government is promoting "localized production" policies, offering tax incentives for glass production line investments. Deepening Sino-Kazakh "Belt and Road" cooperation and infrastructure upgrades at Xinjiang ports will reduce logistics costs. If local soda ash production projects materialize, they will reshape the cost structure.

⚠ FX Risk **Tenge Annualized Volatility Approx. 12%-15%**

Localization Policy Opportunity **New glass production lines enjoy 5-year tax exemption** Investment Window Period

Logistics Upgrade Benefit **Sino-Kazakh railway capacity increase of approx. 20%** ▲ 2025-2026

Source: Kazakh Invest, Kazakhstan Ministry of Finance policy documents, Ministry of Commerce of China Department of Eurasian Affairs, 2025-2026

Key Data Source Summary

- Kazakhstan Bureau of National Statistics (Official trade and industry data, 2025)
- General Administration of Customs of China (HS code category export statistics, 2025)
- World Bank (Kazakhstan GDP and construction sector data, 2025)
- Argus Media (Central Asia glass and soda ash market report, December 2025)
- SCI99 & 100ppi.com (China flat glass, soda ash, silica sand prices, December 2025)
- Longzhong Info (Soda ash weekly quotes and market analysis, December 2025)
- National Bank of Kazakhstan (Exchange rate data, full-year 2025)
- Kazakhstan Ministry of Industry and Infrastructure Development (Glass industry capacity report, 2025)