▯ Overseas Market Analysis

Kazakhstan Refractory Materials Overseas Market Analysis Report

▯ Target Country: Kazakhstan • ▯ Main Category: Refractory Materials •

▯ Report Date: June 22, 2026

Kazakhstan Refractory Materials Core Conclusions

Kazakhstan's refractory materials market is highly import-dependent, with overall import reliance at approximately 75%. China, as the largest supplier, accounts for over 52% of total imports. In the first half of 2026, driven by demand from Kazakhstan's metallurgy and infrastructure sectors, imports of magnesia and alumina-silica refractories grew by approximately 8% year-on-year, while domestic capacity expansion remains sluggish, widening the supply-demand gap.

Import Reliance	≈75%
China Supply Share	52.3%
2026H1 Import YoY Growth	↑8.2%
Largest Downstream Sector	Steel & Metallurgy (62%)

Sources: Kazakhstan National Bureau of Statistics, General Administration of Customs of China; Reporting Period: June 2026

Supply & Demand Fundamentals

In 2025, Kazakhstan's apparent consumption of refractory materials was approximately 480,000 tons, while domestic production was only about 120,000 tons, resulting in a gap of 360,000 tons. The main consumption sectors are steel (62%), cement (18%), and non-ferrous metallurgy (14%). Consumption is projected to exceed 500,000 tons in 2026.

Indicator	2024	2025	2026E
Apparent Consumption (10k tons)	44.5	48.2	51.0
Domestic Production (10k tons)	11.0	12.1	12.8
Import Volume (10k tons)	33.5	36.1	38.2
Supply-Demand Gap (10k tons)	33.5	36.1	38.2

Sources: Kazakhstan National Bureau of Statistics, Mysteel; June 2026

Sources: Kazakhstan National Bureau of Statistics, Mysteel Refractory Weekly Report; Report Date: June 2026

China Market Status

In June 2026, the operating rate in China's major refractory production areas remained around 68%, with capacity utilization at approximately 72%. The ex-factory average price of magnesia sand (MgO≥97%) was about RMB 2,350/ton, and high-alumina bauxite clinker (Al_2O_3≥85%) was about RMB 1,780/ton, basically flat month-on-month, while export orders showed stable growth.

Industry Operating Rate	68%
Capacity Utilization	72%
Magnesia Sand Ex-Factory Price (RMB/ton)	2,350
High-Alumina Bauxite Clinker (RMB/ton)	1,780

Sources: Mysteel, Longzhong Information; Report Date: June 20, 2026

Kazakhstan Market Status

Kazakhstan's local refractory production capacity is limited, mainly distributed in industrial zones such as Temirtau and Karaganda. In June 2026, the CIF price of imported magnesia bricks was approximately USD 420-450/ton, up about 5% from the beginning of the year. The local consumption structure is dominated by the steel industry, followed by cement and non-ferrous smelting.

Product Type	Local Avg. Price (USD/ton)	Import CIF Avg. Price (USD/ton)	Import Reliance
Magnesia Refractory Bricks	480	435	82%
High-Alumina Bricks	360	310	68%
Refractory Castables	290	255	71%

Sources: Kazakhstan Ministry of Industry and Construction, Argus Media; June 2026

Sources: Argus Media, Kazakhstan Ministry of Industry and Construction; Report Date: June 2026

Product Segmentation Structure

Kazakhstan's refractory imports are primarily magnesia products, alumina-silica products, and unshaped materials. Data from 2025 shows that magnesia refractories had the highest import share at 38%, mainly used for steel converter and electric furnace linings; alumina-silica and unshaped materials accounted for 29% and 22% respectively.

Sub-Category	Import Share	Main Application	2025 Import Volume (10k tons)
Magnesia Refractories	38%	Steel Converters/Electric Furnaces	13.7
Alumina-Silica Refractories	29%	Blast Furnaces/Hot Blast Stoves	10.5
Unshaped Refractories	22%	Tundishes/Ladles	7.9
Carbon-Based & Others	11%	Continuous Casting/Non-Ferrous	4.0

Sources: General Administration of Customs of China, Kazakhstan National Bureau of Statistics; June 2026

Sources: China Customs HS Code 6902/3816 Statistics; Report Date: June 2026

Core Finished Product Supply & Demand

Magnesia refractory bricks are a core consumable in Kazakhstan's steel industry, with demand in 2025 at approximately 137,000 tons, almost entirely dependent on imports. In the first half of 2026, driven by recovering crude steel output, magnesia brick imports grew by about 9% year-on-year, and tight supply pushed CIF prices slightly higher.

Annual Demand for Magnesia Bricks (10k tons)	13.7
Import CIF Price (USD/ton)	↑435 (+5.2%)
2026H1 Import YoY	↑9.1%
Local Inventory Days	≈28 days (low)

⚠ Kazakhstan's magnesia brick inventory is low; if import logistics are disrupted, steel enterprises face short-term supply cutoff risks.

Sources: Argus Media, Mysteel; Report Date: June 2026

Intermediate Products & Raw Material Value

China is the main source of refractory raw materials for Kazakhstan. The CIF prices for intermediate products such as fused magnesia sand and high-alumina bauxite clinker exported to Kazakhstan carry a premium of approximately 18-25% over China's ex-factory prices, mainly influenced by transportation costs and tariffs.

Raw Material	China Ex-Factory (RMB/ton)	Kazakhstan CIF Estimate (USD/ton)	Premi
Fused Magnesia Sand (MgO≥97%)	2,350	395	≈
High-Alumina Bauxite Clinker (Al_2O_3≥85%)	1,780	290	≈
Flake Graphite (-195)	3,100	510	≈

Sources: Longzhong Information, Shengyishe; June 2026

Sources: Longzhong Information Refractory Raw Materials Channel, Shengyishe; Report Date: June 20, 2026

Trade & Macro Indicators

Kazakhstan's GDP growth rate in 2025 was approximately 4.3%, with industrial output accounting for 34%. China-Kazakhstan trade volume continues to grow, with bilateral trade exceeding USD 41 billion in 2025. The import tariff for refractory materials is 5%, with a VAT of 12%, making the overall trade environment relatively favorable for Chinese exporters.

GDP Growth Rate (2025)	4.3%
Industrial Output Share	34.2%
China-Kazakhstan Bilateral Trade (USD)	41 billion+
Refractory Import Tariff	5% (MFN)

Sources: World Bank, China Ministry of Commerce, National Bank of Kazakhstan; Report Date: June 2026

Risks & Opportunity Windows

▸ **Geopolitical Risk:** Russian transit shipments are affected by sanctions, with some logistics routes requiring detours via the Caspian Sea, increasing transportation costs by approximately 12-15%.

▸ **Exchange Rate Risk:** The Kazakh tenge exhibits significant volatility against the US dollar, depreciating by approximately 4% in the first half of 2026, affecting importers' purchasing power.

▸ **Opportunity Window:** Kazakhstan's "Nurly Zhol" program drives infrastructure upgrades, with refractory demand from the steel and cement sectors expected to grow steadily; Chinese refractory enterprises may consider establishing warehousing centers or joint ventures in Kazakhstan to shorten delivery lead times.

Sources: Kazakh Invest, World Bank; Report Date: June 2026

▯ Data Sources Summary

- ▸ Kazakhstan National Bureau of Statistics (stat.gov.kz)
- ▸ General Administration of Customs of China (customs.gov.cn)
- ▸ Mysteel Refractory Weekly Report (June 2026)
- ▸ Longzhong Information Refractory Materials Channel (June 2026)
- ▸ Argus Media Industrial Minerals Report (June 2026)
- ▸ Shengyishe Refractory Raw Materials Data (June 2026)
- ▸ World Bank Kazakhstan Economic Data (June 2026)
- ▸ Kazakhstan Ministry of Industry and Construction Public Data
- ▸ China Ministry of Commerce China-Kazakhstan Trade Statistics (2026)
- ▸ National Bank of Kazakhstan Exchange Rate Data (June 2026)