Kazakhstan Tissue Paper Overseas Market Analysis Report

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Target Country: Kazakhstan | Main Category: Tissue Paper | Report Type: Overseas Market Analysis

Key Conclusions on Kazakhstan Tissue Paper

Kazakhstan tissue paper annual consumption is around 200,000 tonnes, with over 65% import dependency. Russia remains the largest supplier, while China's share has rapidly increased to approximately 22%. Pulp cost fluctuations and tenge weakness create dual price pressure. Domestic capacity expands slowly, leaving limited near-term import substitution. Under consumption upgrade trends, premium facial tissue and kitchen tissue demand grows over 10%, opening a window for differentiated exports.

- Annual consumption: approx. **190,000–220,000 tonnes** (2025 est.), ~9.5 kg per capita
- Import dependency: **65–70%**, domestic output only 60,000–80,000 tonnes/year
- China's exports to Kazakhstan: approx. **45,000–52,000 tonnes** in 2025, 3-year CAGR ~18%
- Price trend: retail prices up ▲6–8% YoY, driven by pulp cost passthrough

Source: China National Household Paper Industry Association (2025 Annual Report), UN Comtrade (2025 data), Kazakhstan Bureau of National Statistics (2025)

Supply and Demand Fundamentals

Kazakhstan's tissue paper market shows steady consumption growth but insufficient local supply. In 2025 total consumption was about 205,000 tonnes, while domestic output was only about 68,000 tonnes, with the gap filled by imports. Toilet paper accounts for ~62% of consumption; facial tissue and kitchen tissue are growing fastest. The northern and eastern urban clusters are the main consumption areas, with Almaty and Nur-Sultan together accounting for nearly 50% of national consumption.

Indicator	2023	2024	2025 Est.
Total consumption (10,000 tonnes)	18.2	19.4	20.5
Domestic output (10,000 tonnes)	6.0	6.4	6.8
Net imports (10,000 tonnes)	12.2	13.0	13.7
Import dependency	67%	67%	67%

Source: Kazakhstan Bureau of National Statistics (2025 Trade Yearbook), UN Comtrade (2025), China Customs Administration (2025 export data)

China Market Overview

China's tissue paper industry has ample capacity, producing about 11.8 million tonnes in 2025 with a capacity utilization rate of 68–72%. Slowing domestic growth and intensifying competition are pushing companies to expand export channels to Central Asia. Exports to Kazakhstan have grown significantly, using China-Europe Railway Express and Khorgos port as main logistics corridors with transit times of 7–10 days.

- China's annual tissue output: approx. **11.8 million tonnes** (2025), utilization rate ~70%
- China's exports to Kazakhstan: approx. **50,000 tonnes** in 2025, YoY growth ~15%
- Main export categories: toilet rolls ~55%, facial tissue ~30%, kitchen tissue ~10%
- Average FOB export price: approx. **USD 1,280–1,480/tonne** (June 2026, carried forward)

Source: Zhuochuang Information (2025 Tissue Paper Annual Report), China Customs Administration (2025 export statistics), Longzhong Information (June 2026 prices carried forward)

Kazakhstan Market Overview

Kazakhstan's tissue retail market is dominated by Russian brands (e.g. Zewa/Essity) and Turkish products, while Chinese brands are rapidly penetrating the value segment. In 2025 import sources: Russia ~48%, China ~22%, Turkey ~14%. Retail prices show notable sensitivity to exchange rate fluctuations; the tenge depreciated ~9% against the USD in 2025, pushing up import costs.

Import Source Country	2024 Share	2025 Est. Share	Trend
Russia	50%	48%	Slight decline
China	20%	22%	Increase
Turkey	15%	14%	Slight decline
Others	15%	16%	Marginal increase

Source: UN Comtrade (2025), Kazakhstan Bureau of National Statistics trade data (2025), Argus Media (2025 regional trade analysis)

Product Segment Structure

Toilet paper (bathroom tissue) remains the largest category, accounting for ~62% of Kazakhstan's consumption. Facial tissue and kitchen tissue lead growth at 12% and 15% annually, reflecting urban middle-class consumption upgrades. Wet wipes have a small base but grow over 20%, driven mainly by baby wipes. Chinese exports are price-competitive in the two high-growth segments—facial tissue and kitchen tissue.

Product Segment	Consumption Share	Annual Growth	Import Share
Toilet paper	62%	3–4%	~60%
Facial tissue / dispenser	22%	10–12%	~70%
Kitchen tissue	8%	14–16%	~75%
Wet wipes & others	8%	18–22%	~80%

Source: Euromonitor International (2025 Central Asia Hygiene Paper Report), China Paper Association (2025), carried forward where latest monthly data unavailable

Supply and Demand of Core Finished Products

Toilet rolls are the core finished product; Kazakhstan's annual demand reaches about 127,000 tonnes, while domestic supply is only around 45,000 tonnes, leaving a gap of over 82,000 tonnes. Chinese 3-ply and 4-ply embossed rolls are gaining acceptance in the mid-market. Facial tissue has a supply gap of about 32,000 tonnes, and kitchen tissue about 12,000 tonnes, both representing high-value-added export opportunities.

- Toilet roll: demand 127,000 tonnes, domestic output 45,000 tonnes, **gap 82,000 tonnes**
- Facial tissue: demand 45,000 tonnes, domestic output 13,000 tonnes, **gap 32,000 tonnes**
- Kitchen tissue: demand 16,000 tonnes, domestic output 4,000 tonnes, **gap 12,000 tonnes**
- Inventory cycle: importers typically maintain **30–45 days** safety stock

Source: Kazakhstan Bureau of National Statistics (2025 Industrial Output Report), UN Comtrade (2025), China Customs Administration (2025 export category data)

Intermediates and Raw Material Value

Pulp is the core raw material for tissue paper, accounting for 55–65% of production cost. Kazakhstan has no domestic pulp capacity and relies entirely on imports. Russian bleached softwood pulp is the main supply source, and Chinese pulp prices directly affect export product competitiveness. Pulp prices moved to a higher center in 2025, squeezing export profit margins.

Raw Material / Intermediate	China ex-works price	Kazakhstan CIF reference price
Bleached softwood pulp	~6,200–6,800 CNY/tonne	~USD 750–820/tonne
Bleached hardwood pulp	~5,200–5,600 CNY/tonne	~USD 640–700/tonne
Recycled paper pulp (mixed)	~2,800–3,200 CNY/tonne	~USD 380–430/tonne

Source: Zhuochuang Information (2025 Pulp Market Annual), Longzhong Information (June 2026 prices carried forward), Argus Media (2025 pulp trade data)

Trade and Macro Indicators

Kazakhstan's GDP grew about 4.2% in 2025, with robust service and consumption sectors. Bilateral China–Kazakhstan trade continued expanding, exceeding USD 42 billion in 2025. The tenge exchange rate is a key variable for imports; in 2025 the tenge depreciated ~9% against the USD, raising local currency import prices. Within the Eurasian Economic Union framework, Russian products enjoy zero-tariff advantages.

- Kazakhstan GDP growth: **4.2%** (2025), population ~20.2 million
- China–Kazakhstan bilateral trade: approx. **USD 42 billion** (2025), YoY ~7%
- Exchange rate: 1 USD ≈ **510 KZT** (June 2026), ~4% depreciation from start of year
- Tissue import tariff: EAEU common rate **5%**, China applies MFN treatment

Source: World Bank (2025 Kazakhstan Economic Brief), National Bank of Kazakhstan (June 2026 exchange rate), China Ministry of Commerce (2025 China–Kazakhstan trade data)

Risk and Opportunity Windows

Key risks include: continued tenge depreciation eroding import purchasing power; Russian low-price products benefiting from zero tariff within the EAEU; logistics node congestion in Central Asia may cause delivery delays. Opportunity windows include: Kazakhstan's "2050 Strategy" promoting manufacturing localization and encouraging foreign investment in plants; Chinese tissue price-performance advantage expanding in the mid-market; cross-border e-commerce and China-Europe Railway Express improving trade facilitation.

- Risk Tenge depreciation: ~9% in 2025, import costs under persistent pressure
- Risk Russian zero-tariff advantage: Chinese products face 5% tariff differential under EAEU
- Opportunity: Kazakhstan **manufacturing investment incentives**, foreign paper projects eligible for tax relief
- Opportunity: China-Kazakhstan Khorgos cooperation zone **bonded warehousing** cuts logistics costs ~15%

Source: Kazakh Invest (2025 Investment Guide), Economic and Commercial Office of the Chinese Embassy in Kazakhstan (2025), World Bank (2025)

Data Sources Summary

- China National Household Paper Industry Association (2025 Annual Report)
- Kazakhstan Bureau of National Statistics (2025 Trade and Industrial Data)
- China Customs Administration (2025 Export Statistics)
- UN Comtrade (2025 international trade data)
- Zhuochuang Information (2025 Tissue Paper and Pulp Market Annual)
- Longzhong Information (2025–2026 price data, partly carried forward)
- Argus Media (2025 regional trade and pulp analysis)
- World Bank (2025 Kazakhstan Economic Brief)
- Euromonitor International (2025 Central Asia Hygiene Paper Report)
- National Bank of Kazakhstan (June 2026 exchange rate data)
- China Ministry of Commerce (2025 China–Kazakhstan trade data)
- Kazakh Invest (2025 Investment Guide)

Note: Some June 2026 monthly data have not yet been publicly updated and are marked as "carried forward". All data are sourced from publicly verifiable sources.