Kazakhstan Nonwoven Fabric Overseas Market Analysis Report

Target Country: Kazakhstan | Main Category: Nonwoven Fabric | Report Update Date: June 22, 2026

Kazakhstan Nonwoven Fabric Key Conclusions

Kazakhstan's nonwoven fabric market is highly dependent on imports, with an import dependency rate of approximately 87% in 2025. China remains the largest supplier, accounting for 58% of total imports. In H1 2026, import costs rose by approximately 6% year-on-year due to continued Tenge depreciation and global polypropylene price volatility. Local capacity expansion remains slow, making the supply-demand gap difficult to close in the short term, providing a stable market window for Chinese export enterprises.

- Annual consumption: approx. **58,000 tons** (2025, prior year estimate)
- Import dependency: **87%**, local output only about 7,500 tons
- China supply share: **58%**, the largest source country
- Q1 2026 average import price YoY increase: approx. 6.2%

Source: Bureau of National Statistics of Kazakhstan Annual Trade Report (2025); GACC HS Chapter 56 Export Statistics (April 2026)

Supply and Demand Fundamentals

Kazakhstan's nonwoven fabric market is characterized by "low output, high imports." In 2025, apparent consumption was approximately 58,000 tons, while local production fell short of 8,000 tons. The supply-demand gap was primarily filled by sources from China, Russia, and Turkey. Key consumption sectors include medical & hygiene (35%), construction & geotextiles (25%), and agricultural cover (15%).

Indicator	2023	2024	2025
Domestic Output (10k tons)	0.62	0.70	0.75
Import Volume (10k tons)	4.55	4.90	5.05
Apparent Consumption (10k tons)	5.17	5.60	5.80

Source: Bureau of National Statistics of Kazakhstan; UN Comtrade Database (2025 data uses prior year estimate, no latest annual public data available)

China Market Situation

In H1 2026, China's nonwoven fabric industry operating rate remained around 68%, with ample capacity. The ex-factory average price of spunbond nonwoven fabric (PP) was approximately 12,800 RMB/ton, a slight decrease of 2.3% from the same period in 2025. Exports to Central Asia maintained growth momentum; from January to May 2026, China's nonwoven fabric export volume to Kazakhstan grew by approximately 8% year-on-year.

- Industry operating rate: approx. **68%** (May 2026, SCI99)
- Spunbond nonwoven ex-factory avg. price: **12,800 RMB/ton** (June 2026)
- Exports to Kazakhstan (Jan-May): approx. **21,500 tons**, +8% YoY
- Capacity utilization: approx. **71%**, overcapacity pressure persists

Source: SCI99 Nonwoven Weekly Price Monitor (2nd week of June 2026); GACC Export Statistics (May 2026)

Kazakhstan Market Situation

The CIF import price of nonwoven fabric in Kazakhstan (CIF Almaty) in June 2026 was approximately USD 1,950–2,150 per ton, significantly impacted by Tenge depreciation and freight cost fluctuations. Among import source countries, China accounts for 58%, Russia 18%, Turkey 10%, and Uzbekistan 6%. The medical and hygiene sector holds the largest consumption share.

Import Source Country	Share	Average CIF Price (USD/ton)
China	58%	1,950-2,100
Russia	18%	2,050-2,250
Turkey	10%	2,100-2,350
Uzbekistan	6%	1,800-2,000

Source: Bureau of National Statistics of Kazakhstan Import Trade Data (2025); Argus Media Central Asia Market Assessment (June 2026)

Product Segment Structure

Kazakhstan's nonwoven fabric imports are dominated by spunbond (SS/SSS), accounting for approximately 48% of total imports. Meltblown nonwoven fabric holds a stable share of about 15% due to medical demand. Spunlace nonwoven fabric is growing rapidly in the wipes and medical dressing sectors, accounting for approximately 18%. Needle-punched nonwoven fabric is mainly used in geotextile and filtration applications.

Product Segment	Import Share	Main Application	Price Range (USD/ton)
Spunbond Nonwoven	48%	Hygiene, Packaging	1,800-2,200
Spunlace Nonwoven	18%	Wipes, Medical	2,200-2,800
Meltblown Nonwoven	15%	Masks, Filtration	2,500-3,200
Needle-punched Nonwoven	12%	Geotextile, Carpet Backing	1,600-2,000

Source: CNITA Export Structure Analysis (2025); Kazakhstan Customs HS Code Breakdown Statistics (2025, prior year estimate)

Core Downstream Product Supply & Demand

Kazakhstan relies almost entirely on imports for medical disposable surgical gowns and mask-grade nonwoven fabric. In 2025, imports of medical nonwoven products amounted to approximately USD 42 million, up 11% year-on-year. There is only one small local processing enterprise conducting basic slitting and rewinding, with capacity far insufficient to meet demand. Demand for construction geotextiles is steadily growing, driven by infrastructure investment.

- Medical nonwoven product imports: approx. **USD 42 million** (2025)
- Local processing capacity: only about **1,200 tons/year**, focused on slitting & rewinding
- Construction geotextile demand growth rate: **7-9%** annually
- Hygiene product (diaper) nonwoven fabric: import volume approx. **8,000 tons/year**

Source: Kazakhstan Ministry of Health Medical Device Import Statistics (2025); Kazakhstan Construction Industry Association (Q4 2025 Report)

Intermediate Goods and Raw Material Value

Polypropylene (PP raffia grade) is the core raw material for nonwoven fabric. In June 2026, the average price of PP raffia in East China was approximately 7,650 RMB/ton, while the CIF price of imported PP in Kazakhstan was about USD 980–1,050 per ton. Raw material cost accounts for 60-65% of the ex-factory price of spunbond nonwoven fabric. ES fiber and viscose staple fiber prices remain relatively stable.

Raw Material Type	China Avg. Price	Kazakhstan CIF Reference Price
PP Raffia Grade	7,650 RMB/ton	980-1,050 USD/ton
ES Composite Fiber	13,200 RMB/ton	1,650-1,800 USD/ton
Viscose Staple Fiber	12,100 RMB/ton	1,500-1,650 USD/ton

Source: Longzhong Information PP Daily Price Report (June 19, 2026); SCI99 Chemical Fiber Raw Material Weekly Report (2nd week of June 2026)

Trade and Macroeconomic Indicators

Kazakhstan's GDP growth rate in 2025 was approximately 4.3%, with sustained growth in construction and medical sector investment. The Tenge-to-USD exchange rate was approximately 485:1 in June 2026, depreciating about 4% from the beginning of the year. Under the EAEU framework, nonwoven fabric import tariffs range from 5-8%, while China benefits from GSP tariff treatment. The share of local-currency settlement in China-Kazakhstan trade has increased to approximately 18%.

- GDP growth rate: **4.3%** (2025, World Bank)
- Exchange rate: **1 USD ≈ 485 Tenge** (June 2026)
- Nonwoven fabric import tariff: **5-8%** (EAEU unified tariff)
- China-Kazakhstan trade volume (2025): approx. **USD 41 billion**, +6.5% YoY

Source: World Bank Kazakhstan Country Report (2025); National Bank of Kazakhstan Exchange Rate Data (June 20, 2026); Eurasian Economic Commission Tariff Schedule

Risks and Opportunity Windows

Major risks include continued Tenge depreciation driving up import costs, competition from low-priced Russian supplies, and geopolitical uncertainties. Opportunity windows lie in Kazakhstan's "2050 Strategy" promoting healthcare infrastructure upgrades, the enormous domestic nonwoven fabric capacity gap, and continued trade facilitation under the China-Kazakhstan Belt and Road framework. ⚠ Monitor Tenge exchange rate volatility

- Risk: Tenge cumulative depreciation approx. 4% in 2026, importers' purchasing willingness fluctuates
- Risk: Russian low-cost spunbond exports to Kazakhstan up approx. 12% YoY
- **Opportunity:** Kazakhstan healthcare infrastructure investment plan approx. USD 800 million (2025-2028)
- **Opportunity:** China-Kazakhstan Khorgos Cross-border Cooperation Zone simplifies customs clearance

Source: Kazakhstan 2050 Strategy Planning Documents; MOFCOM China-Kazakhstan Economic & Trade Cooperation Brief (Q1 2026); National Bank of Kazakhstan Financial Stability Report

Data Sources Summary

Bureau of National Statistics of Kazakhstan (KazStat) — Annual Trade & Industrial Output Report

General Administration of Customs of China (GACC) — HS Chapter 56 Nonwoven Fabric Monthly Export Statistics (May 2026)

SCI99 — Nonwoven Fabric & Chemical Fiber Raw Material Weekly Price Monitor (June 2026)

Longzhong Information — Polypropylene (PP) Daily & Monthly Price Report (June 2026)

World Bank — Kazakhstan Country Economic Report (2025 Annual)

UN Comtrade — Global Nonwoven Fabric Trade Flow Data (2025)

China Nonwovens & Industrial Textiles Association (CNITA) — Annual Industry Output & Export Structure Report

Argus Media — Central Asia Nonwoven Fabric CIF Price Assessment (June 2026)

National Bank of Kazakhstan — Exchange Rate & Financial Stability Data (June 2026)

Eurasian Economic Commission (EEC) — EAEU Unified Tariff Schedule