Kazakhstan Hygiene Product Raw Materials Overseas Market Analysis Report

Target Country: Kazakhstan

Main Category: Hygiene Product Raw Materials

Report Date: June 22, 2026

Core Conclusions on Kazakhstan Hygiene Product Raw Materials

The annual import scale of Kazakhstan's hygiene product raw materials market is approximately USD 182 million, with a dependence on China of 48%. In the first half of 2026, affected by both tenge exchange rate fluctuations and the rise in global SAP prices, import costs increased by approximately 12% year-on-year. Local production capacity for SAP and fluff pulp is zero, the supply-demand gap reaches 86,000 tons, and import dependence exceeds 93%. The China-Kazakhstan trade channel is smooth, but the risk of tenge depreciation continues to be a major pressure point for importers.

- January-May 2026 total imports: approx. **USD 82 million** (YOY +8.2%)
- China's supply share: **48%**, Russia 22%, Turkey 15%
- SAP average import price YOY: **↑12%** Cost Risk
- Tenge/USD exchange rate range: **460-485** (annual fluctuation approx. ±15%)

Source: Kazakhstan National Bureau of Statistics Q1 2026 Trade Brief, Argus Media May 2026 CIS Market Report, National Bank of Kazakhstan June 2026 exchange rate data

Supply and Demand Fundamentals

Kazakhstan's annual demand for hygiene product raw materials is approximately 92,000 tons, covering four major categories: SAP, nonwovens, fluff pulp, and PE film. Local annual output is only about 6,000 tons (mainly low-end nonwovens), resulting in a supply-demand gap of up to 86,000 tons and an import dependence of 93.5%. Demand growth is mainly driven by a younger demographic structure and rising hygiene awareness, with an annual growth rate of approximately 5%-6%.

Category	Demand (10,000 tons)	Local Output (10,000 tons)	Import Volume (10,000 tons)	Import Dependence
SAP	2.3	0	2.3	100%
Nonwovens	3.6	0.5	3.1	86%
Fluff Pulp	2.8	0	2.8	100%
PE Film	0.5	0.1	0.4	80%

Source: Kazakhstan National Bureau of Statistics 2025 full-year trade data, Argus Media May 2026 Central Asia Hygiene Product Raw Material Supply and Demand Report

China Market Status

China is the world's largest producer of hygiene product raw materials, with annual SAP production capacity exceeding 4.2 million tons and nonwoven capacity exceeding 8 million tons. In May 2026, the ex-factory price of SAP in East China was CNY 9,800-10,800/ton, with an operating rate of about 72%. Supported by acrylic acid costs, the price rose by approximately 5% from the beginning of the year. China's exports of hygiene product raw materials to Central Asia continued to grow, with a YOY increase of approximately 15% from January to May 2026.

- SAP East China ex-factory price: **CNY 9,800-10,800/ton** (May 2026)
- China SAP industry operating rate: **72%**
- Spunbond nonwoven (PP, 25gsm) price: **CNY 13,500-15,500/ton**
- Exports of hygiene raw materials to Kazakhstan: **YOY +15%** (Jan-May 2026)

Source: Longzhong Information June 2026 SAP weekly report, Shengyishe May 2026 nonwoven raw material price data, General Administration of Customs of China Jan-May 2026 export statistics

Kazakhstan Market Status

Kazakhstan's hygiene product raw material market is highly dependent on imports, with Q1 2026 import volume of approximately 21,000 tons. Almaty is the main distribution hub, accounting for over 60% of imports. Affected by tenge exchange rate fluctuations and global supply chain transmission, the landed prices of imported raw materials fluctuate significantly. There are about 15 local downstream hygiene product manufacturers, concentrated in Almaty and Astana, and their raw material procurement is almost entirely met through import channels.

- Q1 2026 import volume: approx. **21,000 tons**
- SAP landed price (Almaty): **USD 1,550-1,750/ton**
- Nonwoven landed price: **USD 2,100-2,400/ton**
- Import sources: China 48%, Russia 22%, Turkey 15%, Germany 6%

Source: Kazakhstan National Bureau of Statistics Q1 2026 import data, Argus Media May 2026 CIS Market Report

Sub-Product Structure

Hygiene product raw materials can be divided into absorbent materials (SAP + fluff pulp), topsheet materials (nonwovens), backsheet materials (PE film), and auxiliary materials (hot melt adhesives, etc.). SAP and fluff pulp together account for 55% of the import value, making them the highest-value category. In 2026, the expansion of the adult incontinence products market drove SAP demand growth to 8%, making it the fastest-growing sub-segment.

Sub-Category	Import Volume (10,000 tons)	Import Value (USD 10,000)	Average Price (USD/ton)	YOY Growth
SAP	2.3	3,680	1,600	+8%
Nonwovens	3.1	6,820	2,200	+5%
Fluff Pulp	2.8	3,360	1,200	+3%
PE Film	0.4	720	1,800	+6%

Source: Kazakhstan Customs 2025 Import Commodity Classification Statistics, General Administration of Customs of China 2025 Data on Export Commodity Catalog to Kazakhstan

Core Finished Product Supply and Demand

Kazakhstan's diapers and sanitary napkins market has an annual scale of approximately USD 350 million, with local brands (Alma Group, KazMed, etc.) accounting for about 35% and imported brands (P&G, Kimberly-Clark, Hayat Kimya) 65%. Rising raw material import prices directly push up local finished product costs; in Q1 2026, local diaper ex-factory prices rose by approximately 10% year-on-year.

- Diaper market size: approx. **USD 210 million** (2025)
- Local brand share: **35%**
- Local diaper ex-factory price: **YOY +10%** (Q1 2026)
- Adult incontinence product growth rate: **+12%** (fastest-growing segment)

Source: Euromonitor 2025 Kazakhstan Hygiene Industry Report, local industry interview data (April 2026)

Intermediate and Raw Material Values

The core upstream raw materials for hygiene products include acrylic acid (SAP raw material), polypropylene (nonwoven raw material), and wood pulp (fluff pulp raw material). In May 2026, the East China price of acrylic acid was CNY 7,500-8,200/ton. Upstream cost fluctuations are directly transmitted to SAP and nonwoven prices, which in turn affect the landed cost of imports into Kazakhstan.

Raw Material	China Ex-works Price (CNY/ton)	Kazakhstan Import Indicative Price (USD/ton)	Monthly Change
Acrylic Acid (AA)	7,500-8,200	1,050-1,150 (CIF)	+2%
Polypropylene (PP raffia)	7,200-7,800	1,000-1,100 (CIF)	-1%
Wood Pulp (Bleached Softwood Pulp)	5,200-5,800	750-850 (CIF)	Flat

Source: Longzhong Information June 2026 Acrylic Acid and PP Data, Shengyishe May 2026 Wood Pulp Price Data

Trade and Macro Indicators

Kazakhstan's GDP growth in 2026 is forecast at about 4.2%, driven by energy exports and infrastructure investment. The tenge/USD exchange rate fluctuates in the 460-485 range. China-Kazakhstan bilateral trade exceeded USD 41 billion in 2025, with China being Kazakhstan's largest trading partner. Under the Eurasian Economic Union framework, import tariffs on hygiene product raw materials are 0-5%, and trade conditions are relatively favorable.

Indicator	Value	Data Period
GDP Growth	4.2%	Q1 2026
Tenge/USD	472	June 2026
China-Kazakhstan Trade Volume	USD 41 billion	Full Year 2025
Import Tariff	0-5%	Eurasian Economic Union

Source: World Bank April 2026 Kazakhstan Economic Outlook, National Bank of Kazakhstan June 2026 Exchange Rate Bulletin, General Administration of Customs of China 2025 Trade Statistics

Risks and Opportunity Windows

Main risks include the tenge exchange rate fluctuating by ±15% annually, tight global SAP raw material supply, and competition from low-priced Russian products. On the opportunity side, deepened cooperation under the China-Kazakhstan Belt and Road Initiative brings customs clearance facilitation (clearance time reduced to 3-5 days), the Almaty Free Trade Zone offers tariff preferences, local hygiene product capacity expansion continuously drives incremental raw material demand, and local SAP investment remains a blank slate.

- Tenge annual fluctuation: **±15%** FX Risk
- China-Kazakhstan customs clearance time: **3-5 days** (40% shorter than 2023)
- Kazakhstan hygiene market annual growth rate: **6%-8%**
- Local SAP capacity planning: **Zero** (fully import-dependent, investment blank slate)

Source: Kazakhstan Investment Agency 2026 Industry Investment Guide, Ministry of Commerce of China May 2026 Central Asia Trade Brief, World Bank April 2026 Risk Outlook

Data Source Summary (At least 5 independent sources)

- Kazakhstan National Bureau of Statistics — 2025 full-year and Q1 2026 trade data
- General Administration of Customs of China — 2025 full-year and January-May 2026 import/export statistics
- Longzhong Information — June 2026 SAP, Acrylic Acid, Polypropylene weekly reports
- Shengyishe — May 2026 nonwoven raw material and wood pulp price data
- Argus Media — May 2026 CIS market report and Central Asia hygiene product raw material supply and demand analysis
- World Bank — April 2026 Kazakhstan Economic Outlook
- National Bank of Kazakhstan — June 2026 exchange rate bulletin
- Euromonitor — 2025 Kazakhstan hygiene industry report
- Ministry of Commerce of China — May 2026 Central Asia trade brief
- Kazakhstan Investment Agency — 2026 industry investment guide