Overseas Market Analysis Report

Kazakhstan Paper Making Equipment Overseas Market Analysis Report

Target Country: Kazakhstan | Main Category: Paper Making Equipment

Report Update Date: June 22, 2026

Core Conclusions on Kazakhstan Paper Making Equipment

The Kazakhstan paper making equipment market has an import dependency exceeding **95%**, with no domestic large-scale whole-machine manufacturing capability. Chinese equipment holds about **38%** market share thanks to its cost-performance advantage. In 2026, driven by the "Nurly Zhol" industrialization policy, equipment import demand continues to grow. ⚠ Tenge exchange rate fluctuations and logistics costs are the core risks.

- Estimated total equipment imports in 2026: **USD 135 million** ↑8.2% (YoY)
- Chinese equipment market share: approx. **38%**, second only to European brands (42%)
- Kazakhstan's self-sufficiency rate for paper making equipment: **less than 5%**, with complete machines entirely dependent on imports
- Tenge to USD exchange rate (June 2026): approx. **472 KZT/USD**

Source: Kazakhstan Bureau of National Statistics, General Administration of Customs of China, World Bank, June 2026

Supply and Demand Fundamentals

The annual demand for paper making equipment in Kazakhstan is approximately USD 120-150 million, with virtually zero domestic supply, making it fully dependent on imports to fill the gap. In 2025, paper production was about 140,000 tonnes and consumption approximately 580,000 tonnes. The supply-demand gap drives paper mill expansion and fuels equipment demand.

Indicator	2024	2025	2026E
Paper making equipment imports (100 million USD)	1.15	1.25	1.35
Domestic paper production (10,000 tonnes)	12.5	14.0	15.8
Paper consumption (10,000 tonnes)	55	58	61
Supply-demand gap (10,000 tonnes)	42.5	44.0	45.2

E stands for estimated value, based on Q1 2026 trends

Source: Kazakhstan Bureau of National Statistics, FAO, UN Comtrade, May 2026

China Market Status

In 2025, China's total export value of paper making equipment was approximately **USD 3.87 billion**, with significant growth in exports to Central Asia. In the first half of 2026, capacity utilization remained at **78%-82%**, and export orders for medium and large paper machines increased notably.

- China's paper making equipment export value (2025): **USD 3.87 billion** ↑6.3%
- Share of exports to Kazakhstan: approx. **1.2%** (approx. USD 46.4 million)

- Industry capacity utilization rate (Q1 2026): **80.5%**
- FOB quotation for small and medium paper machines: **USD 180,000-550,000 per set**

Source: General Administration of Customs of China, China Paper Association, SCI99, June 2026

Kazakhstan Market Status

The Kazakhstan paper making equipment market is dominated by complete machine imports. European brands (Germany, Italy) occupy the high-end market, while Chinese equipment holds a clear advantage in the mid-range segment. In 2026, due to the Tenge depreciation, importers' inquiries for Chinese equipment have increased.

Source Country	Market Share	Equipment Type	Price Range
Germany/Italy	42%	High-end complete paper machines	USD 800,000 - 3,000,000
China	38%	Mid-range complete machines & parts	USD 180,000 - 1,200,000
Russia/Turkey	15%	Auxiliary equipment & second-hand	USD 50,000 - 400,000
Others	5%	Parts & consumables	-

Source: Kazakhstan Bureau of National Statistics, ITC Trade Map, May 2026

Product Segment Structure

Paper making equipment imports can be divided into four categories: complete paper machines account for the largest share (approx. 48%), followed by pulping equipment (22%), paper converting equipment (18%), and environmental auxiliary equipment (12%). China has outstanding competitiveness in pulping equipment and small/medium paper machines.

Segment Category	Import Share	China's Share	2026 Trend
Complete paper machines (incl. upgrades)	48%	35%	↑ Growing demand
Pulping equipment	22%	45%	↑ Steady growth
Paper converting equipment	18%	30%	Stable
Environmental & auxiliary equipment	12%	40%	↑ Policy-driven

Source: UN Comtrade, China Customs HS code analysis, June 2026

Core Finished Product Supply & Demand

Kazakhstan's core finished products — cultural paper and packaging paperboard — both face significant supply-demand gaps. In 2025, packaging paperboard imports reached **280,000 tonnes**, and cultural paper imports were approx. **160,000 tonnes**. There is an urgent need to expand production, which drives procurement of paper making equipment.

- Domestic packaging paperboard production: **85,000 tonnes**, demand approx. 360,000 tonnes, leaving a huge gap
- Paper projects under construction/planning: **3** (2026-2028), with total investment approx. USD 280 million
- Cultural paper import dependency: **approx. 73%**, mainly from Russia and China

Source: Ministry of Industry and Infrastructure Development of Kazakhstan, FAO, Q1 2026

Intermediate Goods and Raw Material Value

Core raw materials for paper making equipment manufacturing include steel, castings, bearings, and electronic control systems. The price of medium plate in China's producing areas is approx. **RMB 3,850/tonne**. For imports into Kazakhstan, the CIF price includes a logistics premium of approx. **12%-18%**, with a significant cost pass-through effect.

Raw Material / Intermediate	China Producing Area Price	CIF Premium in Kazakhstan
Medium plate (Q235B)	RMB 3,850/tonne	+15%
Cast iron parts	RMB 6,200/tonne	+18%
Industrial bearings (imported)	RMB 480/set	+12%
PLC electronic control module	RMB 8,500/set	+10%

Source: Longzhong Information, 100ppi.com, Mysteel, June 2026 (some figures carried forward)

Trade and Macro Indicators

Kazakhstan's 2025 GDP growth rate was **4.3%**, with the manufacturing share rising to **14.2%**. Sino-Kazakh trade volume exceeded **USD 41 billion**. Under the Belt and Road framework, preferential import tariffs for equipment continue. Tenge exchange rate fluctuations are the main uncertainty factor.

- Kazakhstan GDP (2025): approx. **USD 238 billion**, growth rate 4.3%
- Bilateral trade volume between China and Kazakhstan (2025): **USD 41.2 billion** ↑5.8%
- Tenge to USD exchange rate: **472 KZT/USD** (June 2026)
- Import tariff on paper making equipment: **0%-5%** (under MFN treatment framework)

Source: World Bank, Ministry of Commerce of China, National Bank of Kazakhstan, June 2026

Risks and Opportunity Windows

⚠ Risks: Tenge exchange rate fluctuations (annualized volatility approx. 8%-12%), capacity bottlenecks in Central Asian logistics corridors, and price competition from European brands. ✓ Opportunities: Kazakhstan's "Nurly Zhol" industrialization subsidies, the window for expanding domestic paper production capacity, the enhanced cost-performance advantage of Chinese equipment during currency depreciation periods, and support from the China-Kazakhstan production capacity cooperation fund.

- Geopolitics: the Russia-Ukraine situation indirectly affects Central Asian logistics, but Kazakhstan maintains a neutral policy
- Policy dividend: Kazakhstan grants **2-5 years of tax relief** for newly built paper mills
- Localization replacement: Currently no domestic equipment manufacturing capability; the import substitution window will last at least **8-10 years**
- Bilateral cooperation: The China-Kazakhstan production capacity cooperation list includes paper projects, with smooth financing channels

Source: Kazakh Invest, Commercial Office of the Chinese Embassy in Kazakhstan, EIU, June 2026

Data Source Summary

- Kazakhstan Bureau of National Statistics (stat.gov.kz) — supply & demand, production, import data
- UN Comtrade / ITC Trade Map — international trade segment data
- National Bank of Kazakhstan — exchange rate data
- SCI99 — China's paper industry capacity data
- Ministry of Industry and Infrastructure Development of Kazakhstan — industrial policies and project information
- General Administration of Customs of China — China's paper making equipment exports and trade data with Kazakhstan
- World Bank — GDP, macroeconomic indicators
- Longzhong Information / Mysteel — steel and raw material prices
- China Paper Association — industry statistics and export information
- FAO — paper consumption and production data

Note: Some high-frequency data for June 2026 are carried forward, as noted in the corresponding cards. All data comes from publicly verifiable sources, with the cut-off date being the report update date.