Overseas Market Analysis Report

Kazakhstan Rubber Raw Materials Overseas Market Analysis Report

- Target Country: Kazakhstan
- Main Category: Rubber Raw Materials
- Report Date: June 22, 2026

Core Conclusions on Kazakh Rubber Raw Materials

Kazakhstan has no domestic natural rubber production capacity and the market is **entirely dependent on imports**. In the first half of 2026, natural rubber CIF prices remained in the range of USD 1,850-2,100/tonne, while synthetic rubber prices fluctuated slightly due to Russian supply. China's rubber exports to Kazakhstan increased by approximately 8% year-on-year, with Russia still the largest source of supply. Local tire capacity expansion (KamaTyresKZ project) drives steady demand growth, but the tenge exchange rate volatility and high inland logistics costs constitute core risks.

Natural rubber import dependence	**100%**
NR CIF price range (June 2026)	**1,850-2,100 USD/tonne**
China's rubber exports to Kazakhstan YoY	▲ ~8%
Largest supplier country	Russia

Source: Argus Media International Rubber Market Weekly Report, 3rd week of June 2026; China Customs Import and Export Data, May 2026

Supply-demand Fundamentals

Kazakhstan's annual rubber consumption is approximately **65,000-75,000 tonnes**, with natural rubber accounting for about 55% and synthetic rubber about 45%. The country has no natural rubber cultivation conditions, and synthetic rubber production is limited to a small amount of recycled/reprocessed capacity. Consumption growth is mainly driven by tire manufacturing and industrial rubber product demand, with an average annual growth rate of about 4-6%.

Indicator	2024	2025	2026 (Est.)
Total consumption (10,000 tonnes)	6.2	6.8	7.2
Imports (10,000 tonnes)	6.1	6.7	7.1
Domestic production (10,000 tonnes)	0.1	0.1	0.1
Tire manufacturing share	48%	50%	52%

Source: Kazakhstan National Bureau of Statistics Trade Data, April 2026; Longzhong Info Central Asia Rubber Market Annual Report, December 2025

China Market Status

In June 2026, China's natural rubber (SCRWF) spot price was approximately **RMB 15,200-16,300/tonne**, down slightly by 2.3% from May. Synthetic rubber SBR1502 price was about **RMB 13,100-13,900/tonne**.

Domestic tire enterprise operating rates remained at 72-76%, with capacity utilization at a moderate level. China's rubber exports to Kazakhstan maintained a growth trend.

SCRWF spot price (Shanghai)	**15,200-16,300 RMB/tonne**
SBR1502 spot price	**13,100-13,900 RMB/tonne**
Tire enterprise operating rate	**72%-76%**
Rubber exports to Kazakhstan YoY	**▲ 8.2%**

Source: 100ppi.com Rubber Channel, June 20, 2026; Longzhong Info Rubber Weekly Report, 3rd week of June 2026; China Customs, May 2026

Kazakhstan Market Status

Kazakhstan's natural rubber imports are **100% dependent on external supply**, with Russia accounting for about 48%, China about 22%, and Southeast Asia (mainly Thailand and Vietnam) via re-export trade about 25%. Local NR CIF prices are at a premium of about **12-18%** over Chinese port prices, mainly due to inland transportation costs. In synthetic rubber, Russian SBR and BR dominate.

Russian import share	**~48%**
Chinese import share	**~22%**
Southeast Asia re-export share	**~25%**
NR CIF premium (vs Chinese port)	**+12%-18%**

Source: Kazakhstan National Bureau of Statistics, April 2026; Argus Media CIS Rubber Market Report, June 2026

Product Segmentation

Kazakhstan's imported rubber raw materials are mainly divided into natural rubber (NR) and synthetic rubber (SR). Natural rubber is primarily standard rubber (TSR) and ribbed smoked sheets; synthetic rubber, SBR and BR together account for over **70%**, mainly used in tire manufacturing.

Segment	Annual imports (10,000 tonnes)	Share	Main application
Natural rubber (NR)	3.6-4.0	~55%	Tires, conveyor belts
Styrene-butadiene rubber (SBR)	1.5-1.8	~24%	Tire tread
Butadiene rubber (BR)	0.9-1.2	~16%	Tires, seals
Butyl/nitrile rubber	0.3-0.5	~5%	Inner liners, oil-resistant parts

Source: Kazakhstan National Bureau of Statistics Customs Classification Data, April 2026; Zhuochuang Info Synthetic Rubber Annual Report, December 2025

Core Finished Product Supply-Demand

Tires are the **largest end-use segment** for rubber consumption in Kazakhstan, accounting for about 52%. KamaTyresKZ has an annual capacity of about 3 million tires, with actual output of about 2.2 million, resulting in a supply-demand gap of about 800,000 tires that needs to be filled by imports. In 2026, tire imports are estimated at about **1.2 million units**, mainly from Russia and China.

KamaTyresKZ annual capacity	~3 million units
Actual annual output	~2.2 million units
Tire supply-demand gap	~800,000 units
Tire imports (2026 est.)	~1.2 million units

Source: KamaTyresKZ Annual Operations Report, 2025; Kazakhstan Automobile Industry Association Data, Q1 2026

Intermediates and Raw Material Value

There is a significant price gap between natural rubber raw material prices in Chinese production areas and CIF prices in Kazakhstan, mainly due to **inland logistics and customs clearance costs**. The price gap for synthetic rubber is relatively smaller, as Russian supply benefits from geographical proximity. As an intermediate product, natural rubber latex imports by Kazakhstan are limited but command higher unit prices.

Product	China production area price	Kazakhstan CIF price	Price gap
Natural rubber SCRWF	~2,100 USD/tonne	~2,420 USD/tonne	+15%
SBR1502	~1,850 USD/tonne	~2,050 USD/tonne	+11%
Natural rubber latex (concentrated)	~1,600 USD/tonne	~1,950 USD/tonne	+22%

Source: 100ppi.com Rubber Price Data, June 2026; Argus Media CIS CIF Price Assessment, June 2026

Trade and Macro Indicators

Kazakhstan's GDP growth in 2026 is estimated at **4.2%-4.8%**, with manufacturing share steadily increasing. The tenge exchange rate against the USD fluctuated in the range of **460-475 KZT/USD**, depreciating by about 6% compared to 2025. China-Kazakhstan bilateral trade volume continues to grow, with rubber and products included in the priority cooperation category list.

GDP growth (Q1 2026)	4.5%
Tenge exchange rate (June 2026)	~468 KZT/USD
Manufacturing share of GDP	13.8%
China-Kazakhstan rubber trade value (2025)	~32 million USD

Source: World Bank Kazakhstan Economic Brief, June 2026; National Bank of Kazakhstan Exchange Rate Data, June 2026; China Customs, May 2026

Risks and Opportunity Windows

⚠ Main Risks : Continued tenge depreciation drives up import costs; Russian supply faces uncertainty due to geopolitical influences; inland transport relies on railways, and logistics bottlenecks may delay deliveries. Opportunity Windows : Deepening China-Kazakhstan "Belt and Road" cooperation expands tariff preferences for rubber products; local tire capacity expansion creates incremental demand; direct supply from China shortens the supply chain, potentially replacing some re-export trade share.

Exchange rate risk	Tenge depreciates ~6% annually
Logistics risk	**Railway capacity bottleneck**
Cooperation opportunity	China-Kazakhstan tariff preferences expand
Demand increment	**Tire capacity expansion +15%**

Source: World Bank Kazakhstan Risk Assessment, Q1 2026; China Ministry of Commerce China-Kazakhstan Economic and Trade Cooperation Brief, May 2026

Data Sources Summary

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2. China Customs — Import and Export Trade Statistics, May 2026
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