Kazakhstan Agricultural Film Overseas Market Analysis Report

Target Country: Kazakhstan

Main Category: Agricultural Film

Report Update Date: June 22, 2026

Kazakhstan Agricultural Film Market: Core Conclusions

Kazakhstan's agricultural film market relies heavily on imports, with China accounting for approximately 65% of total import volume. In H1 2026, driven by rising PE feedstock prices, CIF prices rose approximately 8% YoY ⚠ Cost Pressure. Greenhouse agriculture expansion policies in southern Kazakhstan continue to drive demand, with annual agricultural film imports expected to exceed 5.2万吨. The import substitution window is projected to remain open for another 3-5 years.

- China's share of Kazakhstan's ag film imports: approx. 65%
- 2026E Kazakhstan total ag film imports: 5.2万吨
- CIF price YoY increase: approx. 8% ▲
- Local substitution window: estimated 3-5 years

Source: UN Comtrade, General Administration of Customs of China, Zhuochuang Information; report date June 2026

Supply-Demand Fundamentals Analysis

Kazakhstan's annual agricultural film demand is approximately 5万吨, while domestic production capacity is under 0.8万吨, leaving a supply gap exceeding 4.2万吨. Greenhouse vegetable cultivation and mulch film application are the two core consumption segments, together accounting for about 78% of demand. Import dependency has remained above 85% for an extended period.

Indicator	2024	2025	2026E
Domestic Production (万吨)	0.65	0.72	0.78
Import Volume (万吨)	4.10	4.60	5.20
Apparent Consumption (万吨)	4.75	5.32	5.98

Source: Bureau of National Statistics of Kazakhstan, UN Comtrade; report date May 2026 (2026 data are industry forecasts)

Source: Ministry of Agriculture of Kazakhstan Annual Report, published March 2026

China Agricultural Film Market Status

In June 2026, China's agricultural film industry operating rate was approximately 72%, with mainstream LLDPE 7042 offers in East China at 8,350-8,650元/吨. Supported by crude oil prices, feedstock costs remain elevated, with agricultural film ex-factory prices up approximately 6% YoY. Export orders to Central Asia continue to grow steadily.

- LLDPE 7042 East China offer: 8,350-8,650元/吨
- Ag film industry operating rate: approx. 72%
- China annual ag film output (2025): approx. 263万吨
- Export FOB quote to Kazakhstan: 1,450-1,680 USD/ton

Source: Zhuochuang Information, Longzhong Information; report date June 18, 2026

Kazakhstan Agricultural Film Market Status

Kazakhstan's end-user retail prices for agricultural film range from approximately 12,500 to 14,800元/吨, representing a premium of roughly 55-70% over China's ex-factory prices. The premium is primarily driven by logistics costs (land transportation approximately 180-220 USD/ton) and distribution markups. The main consumption areas are Almaty Region and Turkistan Region in the south.

- Kazakhstan retail price: 12,500-14,800元/吨 (CNY equivalent)
- Main import sources: China 65%, Russia 22%, Uzbekistan 8%
- Land logistics cost: approx. 180-220 USD/ton
- Core consumption areas: Almaty Region, Turkistan Region

Source: Bureau of National Statistics of Kazakhstan, Kazakhstan Agricultural Information Network; report date May 2026

Product Segment Structure Analysis

Kazakhstan's agricultural film imports are dominated by greenhouse film (thickness 0.08-0.15mm) and mulch film (thickness 0.008-0.02mm). Demand for functional agricultural films (anti-drip/fog, high thermal retention, UV-resistant) is growing significantly, with their share expected to rise to 28% in 2026.

Product Segment	Import Share	Price Range (USD/ton CIF)	Demand Trend
Greenhouse Film	52%	1,550-1,850	↑ Growth
Mulch Film	26%	1,300-1,520	→ Stable
Functional Ag Film	22%	1,800-2,200	↑↑ Rapid Growth

Source: UN Comtrade, industry survey data; report date April 2026

Source: China Plastics Processing Industry Association, Agricultural Film Committee, Q1 2026

Core Finished Product Supply-Demand Analysis

Greenhouse film represents the largest supply-demand gap category in Kazakhstan, with domestic production meeting only about 12% of demand. Greenhouse film imports are projected to reach 2.7万吨 in 2026, with prices rising due to PE resin cost pass-through. Mulch film inventory is relatively ample, with the market dominated by price competition.

- Greenhouse film import volume (2026E): 2.7万吨
- Kazakhstan domestic greenhouse film capacity: approx. 0.32万吨/year
- Greenhouse film CIF average price YoY increase: approx. 7.5%
- Mulch film import inventory turnover days: 45-55 days (normal level)

Source: UN Comtrade, Kazakhstan Customs data; report date May 2026

Intermediate and Raw Material Value Analysis

Core raw material LLDPE accounts for approximately 62% of agricultural film production costs. In June 2026, China East China LLDPE 7042 prices were 8,350-8,650元/吨, with Kazakhstan import indicative CIF Almaty prices around 1,180-1,250 USD/ton. The feedstock cost transmission cycle is approximately 4-6 weeks.

Raw Material / Intermediate	China Price	Kazakhstan CIF Indicative Price	Cost Share
LLDPE 7042	8,350-8,650元/吨	1,180-1,250 USD/ton CIF	62%
LDPE 2426H	9,100-9,450元/吨	1,300-1,380 USD/ton CIF	18%
EVA Resin	12,200-13,500元/吨	1,720-1,900 USD/ton CIF	12%

Source: Zhuochuang Information, Longzhong Information; report date June 19, 2026

Source: SunSirs PE Price Monitoring, third week of June 2026

Trade and Macroeconomic Indicators

Kazakhstan's GDP growth rate in 2025 was 4.8%, with agriculture accounting for approximately 5.2% of GDP. The KZT/CNY exchange rate stands at approximately 66.5:1, representing a depreciation of about 3.5% compared to the same period in 2025. Sino-Kazakh agricultural product trade benefits from a zero-tariff policy, with the import tariff on agricultural film at 0%.

Indicator	Value	YoY Change
GDP Growth (2025)	4.8%	+0.3pct
Agriculture GDP Share	5.2%	→ Unchanged
KZT/CNY Exchange Rate	66.5	Depreciated 3.5%
Ag Film Import Tariff	0%	Zero Tariff

Source: World Bank, National Bank of Kazakhstan, General Administration of Customs of China; report date June 2026

Source: Committee on Statistics of Kazakhstan, Q1 2026 data

Risks and Opportunity Windows

Key risks include ⚠ KZT exchange rate volatility (annualized volatility approx. 12%), rising international PE feedstock prices, and occasional congestion along Central Asian logistics corridors. Opportunities lie in Kazakhstan's "Agriculture Modernization 2030" policy, which explicitly supports greenhouse agriculture expansion, and the China-Kazakhstan Khorgos border cooperation zone, which provides trade facilitation dividends.

- Risk: KZT annualized volatility approx. 12%, impacting import costs
- Risk: International PE prices supported by crude oil, persistent upward pressure
- Opportunity: Kazakhstan greenhouse area planned annual increase of 15% (2025-2030)
- Opportunity: Sino-Kazakh border cooperation zone customs clearance efficiency improved by 25%

Source: Ministry of Agriculture of Kazakhstan "Agriculture Modernization 2030" planning document; World Bank Kazakhstan Economic Brief, April 2026

Data Sources Summary

- Zhuochuang Information — LLDPE/PE feedstock price monitoring, June 2026
- Longzhong Information — Plastic raw material market weekly, June 2026
- General Administration of Customs of China — Agricultural film and plastic products export statistics, May 2026
- UN Comtrade — Kazakhstan agricultural film import data, Q1 2026
- Bureau of National Statistics of Kazakhstan — Agriculture and trade data, May 2026
- World Bank — Kazakhstan Economic Brief, April 2026
- Ministry of Agriculture of Kazakhstan — "Agriculture Modernization 2030" planning document

- SunSirs — PE price monitoring, third week of June 2026
- China Plastics Processing Industry Association, Agricultural Film Committee — Industry report, Q1 2026
- National Bank of Kazakhstan — Exchange rate data, June 2026

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