Overseas Market Analysis Report

Kazakhstan Grain & Cereal Overseas Market Analysis Report

 Target Country: **Kazakhstan** Main Category: **Grain & Cereal** Report Update Date: June 22, 2026

Kazakhstan Grain & Cereal Core Conclusions

Kazakhstan is a globally significant wheat exporter, with wheat production of approximately 15.8 million tons in the 2024/2025 season and exports accounting for about 38% of production. As its emerging trade partner, China imported approximately 650,000 tons of Kazakh wheat in 2024, representing about 6% of China's total wheat imports. Currently, Kazakh grain export prices are facing downward pressure due to loose global supply-demand conditions and Tenge exchange rate fluctuations, but the continued improvement of Sino-Kazakh logistics corridors provides support for trade growth.

Indicator	Value	YoY
2024 Wheat Production	15.8 million tons	**+4.2%**
2024 Total Grain Exports	~9.2 million tons	Flat
Wheat Exports to China	650,000 tons	**+18%**

Source: Kazakhstan Ministry of Agriculture, General Administration of Customs of China, data as of December 2025 (previous values carried forward as of June 2026, no latest public data)

Supply & Demand Fundamentals

Kazakhstan's grain and cereal sector is dominated by wheat, with total grain production of approximately 26.8 million tons in the 2024/2025 season. Domestic consumption is about 14.5 million tons, exports about 9.2 million tons, and carryover stocks about 3.1 million tons. The main consumption areas are flour processing (65%), feed (22%), and seed/industrial use (13%), with overall supply and demand remaining loose.

Item	Volume (10k tons)	Share
Total Grain Production	2,680	100%
Domestic Consumption	1,450	54%
Total Exports	920	34%
Carryover Stocks	310	12%

Source: Kazakhstan Bureau of National Statistics, FAO Cereal Market Report, December 2025 data (previous values carried forward as of June 2026)

China Market Status

China's total wheat imports in 2024 were approximately 11 million tons, of which approximately 650,000 tons were imported from Kazakhstan, accounting for 5.9%. China's domestic wheat price remained in the range of approximately 2,850–2,950 CNY/ton as of June 2026, with an operating rate of about 72%. Sino-Kazakh grain trade is primarily conducted through border small-scale trade and rail transport, with imported Kazakh wheat mainly used for flour processing in the northwestern region.

Indicator	2024	2025 (Est.)
Total Wheat Imports of China	11 million tons	~10.5 million tons
Wheat Imports from Kazakhstan	650,000 tons	~720,000 tons
Domestic Wheat Average Price	2,920 CNY/ton	~2,880 CNY/ton

Source: General Administration of Customs of China, Shengyishe Wheat Price Monitoring, December 2025 – May 2026 data

Kazakhstan Market Status

Kazakhstan's domestic wheat price was approximately 185–210 USD/ton (FOB Aktau Port) as of June 2026, slightly lower than the beginning of the year. Kazakhstan's grain import dependency is extremely low (only small-scale imports of seeds and specialty grains, <3%). The main export destinations are Uzbekistan (35%), Afghanistan (18%), Tajikistan (12%), China (8%), and Iran (7%).

Export Destination	Share	2024 Export Volume (10k tons)
Uzbekistan	35%	322
Afghanistan	18%	166
China	8%	74

Source: Kazakhstan Bureau of National Statistics, Kazakhstan Ministry of Agriculture Trade Report, Q4 2025 data (previous values carried forward as of June 2026)

Product Segmentation Structure

Kazakhstan's grain and cereal sector is centered on wheat (59% of production), followed by barley (14%), corn (5%), rice (3%), and other cereals. In 2024, the average export price of wheat was approximately 240 USD/ton, barley approximately 195 USD/ton, and corn approximately 210 USD/ton. Demand for high-protein hard wheat has been growing relatively fast.

Category	2024 Production (10k tons)	Avg. Export Price (USD/ton)
Wheat	1,580	240
Barley	380	195
Corn	135	210
Rice	78	340

Source: Kazakhstan Bureau of National Statistics, Argus Media Grain Quotations, December 2025 data

Core Finished Product Supply & Demand

Flour is the core processed product of Kazakhstan's grain and cereal sector. Flour production in 2024 was approximately 3.8 million tons, with exports of approximately 1.8 million tons, mainly sold to Afghanistan and neighboring Central Asian countries. Kazakhstan's flour processing capacity utilization rate is approximately 68%, and high-end specialty flour capacity is insufficient, requiring small-scale imports. Flour export prices are approximately 350–380 USD/ton.

Indicator	2024	Trend
Flour Production	3.8 million tons	Flat
Flour Export Volume	1.8 million tons	**+5%**
Processing Capacity Utilization	68%	—

Source: Kazakhstan Grain Processing Association, FAO Processed Products Report, December 2025 data

Intermediate Goods & Raw Material Values

Kazakhstan's grain production costs are significantly affected by fertilizer and seed prices. As of June 2026, urea prices in Chinese production regions were approximately 1,950 CNY/ton, and diammonium phosphate approximately 3,650 CNY/ton. Kazakhstan's imported fertilizer CIF prices (from Russia) were approximately 280–320 USD/ton. Approximately 60% of high-quality seeds rely on imports, and logistics costs account for about 12%–18% of the grain CIF price.

Input	China Domestic Price	Kazakhstan CIF/Indicative Price
Urea	1,950 CNY/ton	~290 USD/ton
Diammonium Phosphate	3,650 CNY/ton	~480 USD/ton
Wheat Seed (High Quality)	—	~520 USD/ton

Source: Shengyishe Fertilizer Price Monitoring, Kazakhstan Ministry of Agriculture Input Report, December 2025 – May 2026 data

Trade & Macro Indicators

In 2024, the total bilateral trade volume between China and Kazakhstan was approximately 41 billion USD, of which agricultural trade was approximately 1.8 billion USD. Kazakhstan's GDP growth rate in 2025 was approximately 4.2%, and agriculture accounted for about 5.1% of GDP. The Tenge to RMB exchange rate is approximately 1 CNY ≈ 64 KZT. Kazakhstan implements a zero-tariff policy on grain exports, and the dedicated grain channel at the China-Kazakhstan Horgos border port has an annual customs clearance capacity of 2 million tons.

Indicator	Value	Period
Total Sino-Kazakh Bilateral Trade	41 billion USD	2024
Kazakhstan GDP Growth Rate	4.2%	2025
KZT/CNY Exchange Rate	~64:1	June 2026

Source: General Administration of Customs of China, World Bank, National Bank of Kazakhstan, 2025 – June 2026 data

Risks & Opportunity Windows

⚠ Risk Kazakhstan's grain production is highly dependent on climatic conditions; drought in the northern region in 2025 caused an approximately 8% reduction in some production areas; Tenge exchange rate fluctuations increase trade settlement uncertainty. ✓ Opportunity The Sino-Kazakh grain corridor continues to upgrade, with Horgos Port adding 300,000 tons of storage capacity in 2026; the Kazakh government encourages high-value-added flour exports to China, with the policy dividend window extending until 2027.

Key Note: Monitor Kazakhstan's new-season wheat harvest data in July 2026; production forecasts will directly impact export quotations to China.

Source: Kazakhstan Ministry of Agriculture Climate Bulletin, China Ministry of Commerce Sino-Kazakh Cooperation Brief, 2025 – June 2026

Data Source Summary

- Kazakhstan Bureau of National Statistics — Grain production, export volume, price data (2024–2025)
- Kazakhstan Ministry of Agriculture — Grain production estimates, export policies, climate bulletins (December 2025)
- General Administration of Customs of China — Sino-Kazakh grain trade import and export data (2024–2025)
- Food and Agriculture Organization of the United Nations (FAO) — Cereal Market Report, supply-demand balance sheet (Q4 2025)
- World Bank — Kazakhstan GDP growth rate, agricultural share data (2025)
- Argus Media — Kazakhstan wheat FOB export quotations (December 2025)
- Shengyishe — China wheat price, fertilizer price monitoring (2025 – May 2026)
- National Bank of Kazakhstan — Tenge exchange rate data (June 2026)
- China Ministry of Commerce — Total Sino-Kazakh bilateral trade volume and cooperation briefs (2024–2026)