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Report Highlights:

A larger than average crop this year caused Kazakhstan to introduce export subsidies for shipping wheat to Europe and other Central Asian countries effective through September 1, 2025. Due to surpluses, low prices have impacted farm profitability and resulted in large government financial support for planting this spring. Looking forward, poor winter precipitation and insufficient snowpack pose significant risks to lower yields for the MY 2025/2026 wheat and barley crop. To add to these headwinds, despite positive steps towards calming bilateral agricultural trade tensions, Russia remains shut to almost all Kazakh grain transit.

WHEAT

Production

FAS Astana estimates wheat production in MY 2024/2025 at 16.5 million metric tons (Table 3), a 26 percent increase from the previous marketing year. Wheat yields in MY 2024/25 are estimated at 1.32 tons per hectare, a 43 percent increase from the previous marketing year.

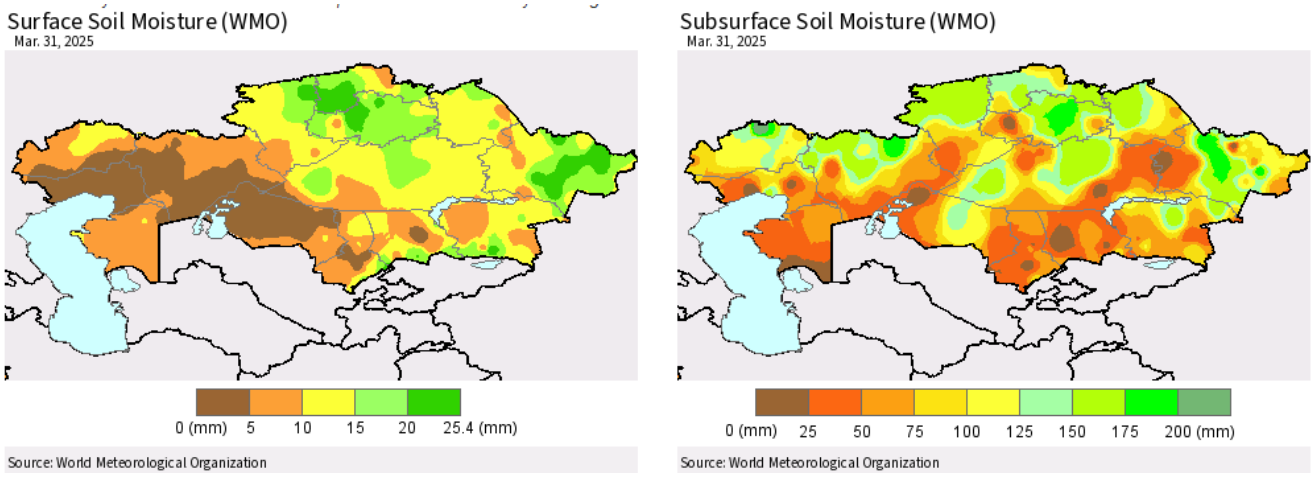
Kazakhstan produced a bumper wheat crop in MY 2024/2025. After heavy rains and flooding in May 2024 delayed planting, Kazakhstan's primary growing regions had near perfect weather, creating the ideal conditions for a large harvest. While rains in early September and cold night temperatures in October reduced overall quality, they only marginally affected quantity. This large harvest with average quality led to falling prices that were complicated by growing transit issues through China and Russia. In response to falling prices and export challenges, the Government of Kazakhstan (GOK) introduced export subsidies on transportation to help Kazakh farmers reach foreign market demand.

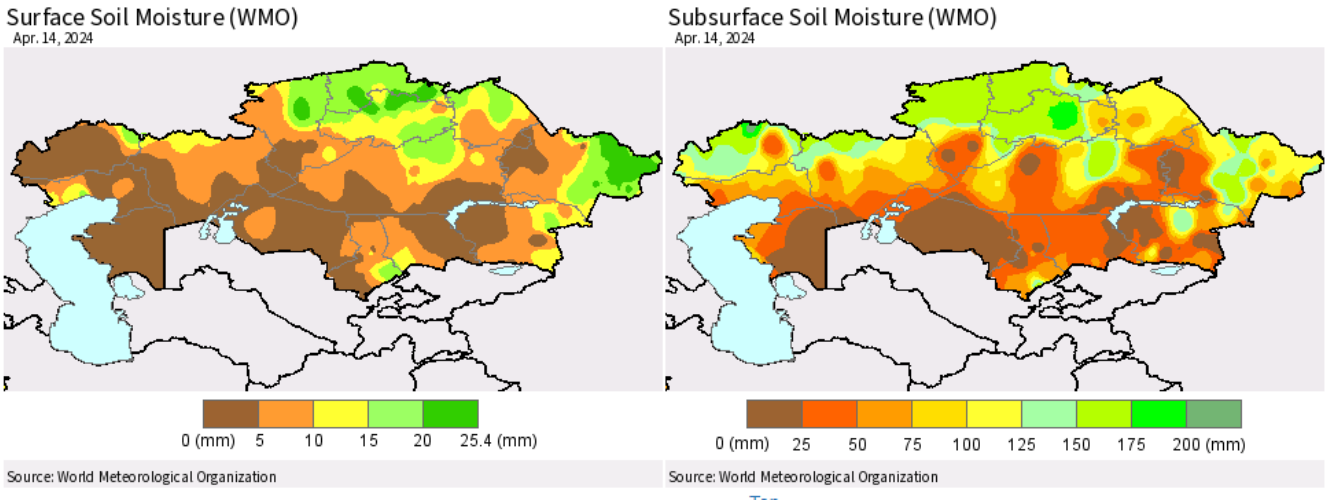
For marketing year 2025/2026, local analysts note that fall moisture reserves were within historic trends, but winter precipitations levels were observed as poor. Last year's larger than average crop has lowered farm gate prices for wheat and are causing some farmers to change planting intentions away from wheat. Lower precipitation and prices are the major factors behind lower MY 2025/2026 wheat production estimates.

Weather Remains the Greatest Risk to MY 2025/2026 Production

According to USDA Crop Explorer data, surface soil moisture and subsurface soil moisture in the three northern grain producing regions of Akmola, Kostanay, and North Kazakhstan are reported as smaller in April 2025 than in April 2024 (Figure 3).

Figure 3. Surface soil moisture and subsurface soil moisture in April 2024 and 2025





Source: USDA-FAS Crop Explorer

Local experts note that winter of 2024-2025 turned out to be one of the warmest in recent years. However, the nature and dynamics of air temperatures from October to January are similar to last year's trends. October in most of the major grain-growing regions was 0.5-1 degrees Celsius (hereinafter – C) warmer than normal. In November, this trend continued and was warmer by 0.5-2 degrees C. December deviated from the norm even more and was 3-5 degrees C higher. January turned out to be abnormally warm, the temperature of the month exceeded the norm by 4-7 degrees C. This winter mostly closely resembles similar weather patterns in 2019-2020, 2006-2007, 1998-1999 and 1982-1983. This has been one of the warmest winters in Kazakhstan on record.

Due to warmer weather, snow melt occurred abnormally early, staring in some places in February, creating conditions that may lead to major flooding, particularly on the Ishim River. Despite the risk of flooding, fieldwork is likely to begin earlier than usual given warmer temperatures. Meteorologists note that late May is expected to be cool with significant precipitation. This could increase the need for weed control measures, especially for wintering weeds, before the sowing season begins.

Although the coming year is not anticipated to be as dry as 2010 or 2012, drought conditions may occur in late June, particularly in early to mid-July. July is forecasted to have above-average temperatures, followed by average weather in August and colder conditions in September. With the lower-than-average winter precipitation and higher temperatures, there could be yield loss in areas where there is insufficient soil moisture for the crop to rely upon during normal high summer temperatures.

The Geography of Kazakhstan Production

There are three main wheat and barley producing areas in Kazakhstan – Kostanay, North-Kazakhstan and Akmola. Together they account for around 80 percent of the wheat and 60 percent of the barley production in Kazakhstan and belong to the Western Siberian Great Plains. The East-Kazakhstan region is the historical and current capital of sunflower production.

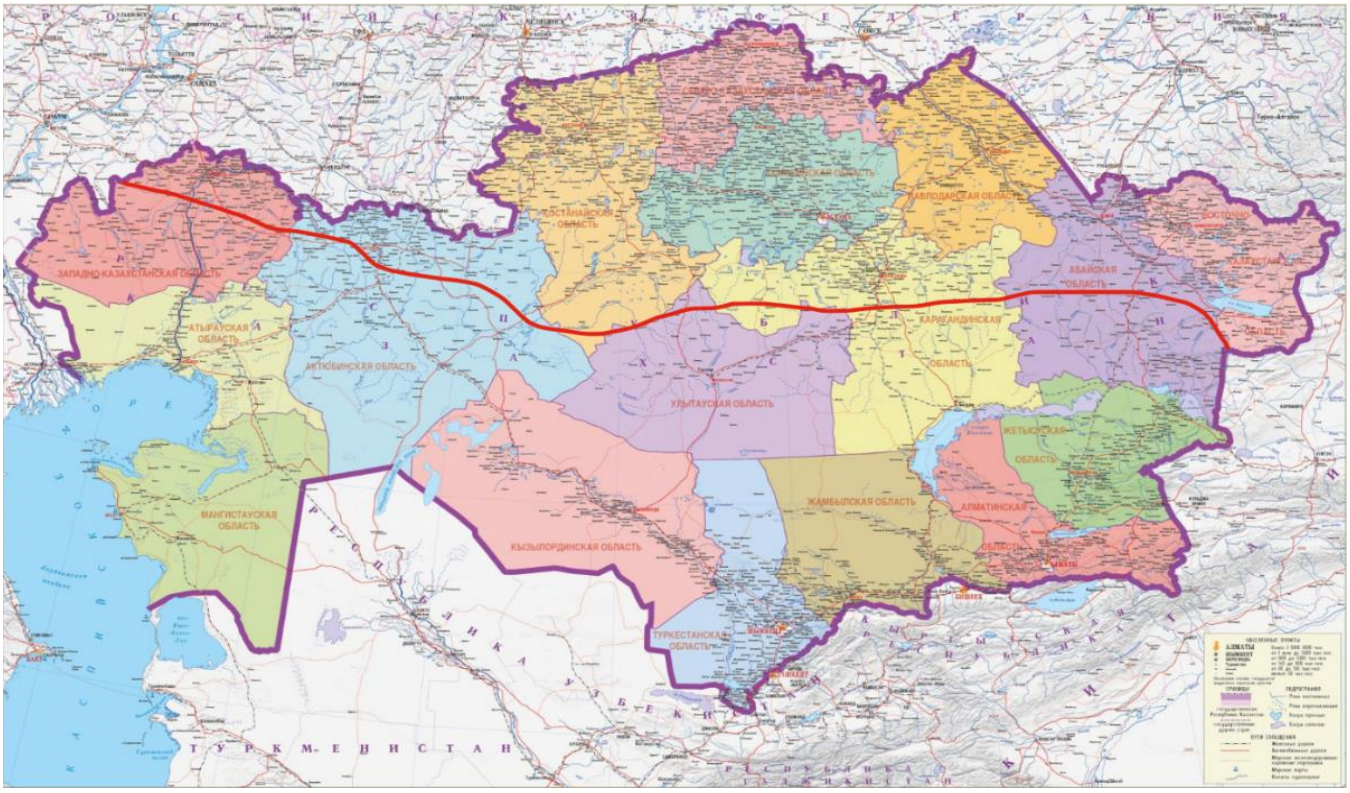
Planting in the northern regions of Kazakhstan (mainly Kostanay, Akmola, and North Kazakhstan) for spring crops typically starts from mid-May to early June. The vegetation period for spring crops is very short, only 88-90 days due to local climatic conditions. Therefore, farmers prefer local and foreign

wheat and barley varieties (from Russia, France, Italy, and Germany) with short and medium vegetation periods. European wheat varieties are particularly favored by local farmers because they are shorter, at 90 cm, compared to the 120 cm height of local varieties. Historically, spring crop yields in Kazakhstan have been much lower than winter crop yields.

The grain belt of Kazakhstan is generally recognized as the region above the red line in Figure 2. Above the red line is grain and oilseed spring production, below are areas suitable for winter crops.

Figure 1. Map of Kazakhstan with Regions

Figure 2. Map Kazakhstan Spring (above the red line) and Winter Grains (below the red line)



A Large Crop Leads to More Government Support

The volume of preferential lending for planting in 2025 was set at 700 billion tenge ($1.4 billion), a record amount compared to the 140 billion tenge ($274 million) last year. To date, over 1,800 agricultural producers have already received financing, totaling 206 billion tenge ($403 million).

Farmers are being financed through various channels, including the Agrarian Credit Corporation, second-tier banks, microfinance organizations, regional investment centers, credit unions, and social entrepreneurship corporations. Preferential loans are provided at a net annual rate of five percent without requiring farmers to apply for subsidies. Farmers applying for loans are eligible for guarantees covering up to 85 percent of the loan amount. Additionally, 200 billion tenge ($392 million) has been allocated this year for preferential financial leasing, enabling the purchase of 6,000 units of domestically produced agricultural machinery. As of today, 3,200 farmers have submitted applications to purchase 5,000 units of machinery, valued at 130 billion tenge ($254 million). The budget allocations to cover export subsidies are reported at 40 billion tenge ($78 million).

Locust Control is Underway

In 2025, locust infestations are expected to affect 2.1 million hectares in Kazakhstan, which is 1 million hectares less than the previous year. A budget of 7.1 billion tenge has been allocated for protective measures against locusts, according to the Ministry of Agriculture of the Republic of Kazakhstan. These funds will support the surveying of 38 million hectares of land, with the involvement of 4,342 personnel – double the number deployed last year. Additionally, 443 units of spraying equipment will be utilized for pest control treatments. To ensure effective pest control, an action plan and roadmap have been developed. Preparatory work has already commenced in the Turkestan and Zhambyl regions. Specialists from the Akmola, Pavlodar, North Kazakhstan, Kostanay, Karaganda, and Abay regions will be dispatched to the Turkestan region to conduct monitoring studies on Moroccan locust larvae, one of the most problematic pests in Kazakhstan.

The Census of Agriculture is Planned for 2025

On August 1, 2025, the National Agricultural Census will start in Kazakhstan. This was reported by the press service of the Agency for Strategic Planning and Reforms. According to the Deputy Head of the Bureau of National Statistics, the census will cover 20,000 agricultural enterprises, 300,000 peasant and farm households, as well as more than 1.9 million private households throughout the country. The main sections of the census will include information on land resources and their use, livestock farming, fish farming, machinery and equipment, production facilities, sales of agricultural products, availability of infrastructure, labor resources, farming conditions, use of digital technologies, etc. According to the work plan, an online survey will start on August 1 on the website sanaq.gov.kz, which will last until August 31, 2025. From September 20 to October 20, 2025, the census stage will be conducted through personal interviews for persons who did not complete the online survey.

According to USDA Crop Explorer data, surface soil moisture and subsurface soil moisture in the three northern grain producing regions is reported smaller in April 2025 than in April 2024 in Kostanay and Akmola regions (Figure 3).

Consumption and Stocks

FAS Astana estimates wheat consumption for MY 2024/2025 at 5.1 million metric tons (Table 3), in line with historic consumption rates. No major new wheat milling facilities have been built over the last year, nor have there been significant changes in population that would result in consumption changes.

According to legislation, the creation and circulation of grain warehouse receipts must be reported by licensed elevators. There are 232 licensed elevators in Kazakhstan which handle grain warehouse

receipts. As of April 4, 2025, grain silos were loaded at 33 percent capacity and there was free storage capacity of 8.7 million metric tons. Please, see Table 3 below.

Table 1. Grain Storages Load by Regions

	Storage capacity, thousand tons	Currently storing, thousand tons	Percent of load	Free storage capacity, thousand tons
Kazakhstan TOTAL	13,261,000	4,492,676	33%	8,768,323
Karaganda region	132,500	57,659	43%	74,840
East-Kazakhstan region	313,700	71,073	22%	242,626
North-Kazakhstan region	3,361,800	1,330,425	39%	2,031,374
Almaty region	62,600	3,429	5%	59,170
Kostanay region	3,031,900	1,005,853	33%	2,026,046
Akmola region	4,541,100	1,744,612	38%	2,819,487
Aktobe region	385,800	83,093	21%	302,706
Pavlodar region	277,300	73,088	26%	204,211
West-Kazakhstan region	634,800	59,257	9%	575,542
Abay region	199,500	25,048	12%	174,451
Astana city	243,000	31,656	13%	211,343
Almaty city	-	-	-	-
Atyrau region	-	-	-	-
Jambyl region	-	-	-	-
Kyzylorda region	40,000	-	0%	40,000
Mangystau region	-	-	-	-
Zhetysu region	14,000	7,477	53%	6,522
Ulytau region	-	-	0%	-
Turkestan region	-	-	0%	-
Shymkent city	-	-	0%	-

Source: Grain Receipts Digital Platform Qoldau

Trade

Based on the increase in wheat production and restoring exports to traditional markets, FAS Astana estimates Kazakhstan's wheat and wheat flour exports for MY 2024/2025 to be 10 million metric tons (MMT), a 27 percent increase from the previous year (see Table 3). Wheat exports since the beginning of MY 2024/2025 (September 2024 to January 2024) are reported at 4.2 million metric tons, or a 24 percent increase from the same period during the last marketing year.

From September 2024 to January 2025, wheat and wheat flour exports have grown substantially to traditional markets like Uzbekistan, Afghanistan, Tajikistan, and the Kyrgyz Republic. Low prices have allowed Kazakhstan to enter new or reclaim lost markets like Latvia, Azerbaijan and Georgia, taking market share from Russia. Increased exports more than offset decreases to China and Italy. Falling exports to China are attributable to Beijing temporarily suspending import permits for Kazakh wheat. Kazakh wheat exports to Italy have fallen due to disruptions in rail access through Russia. Please, see Appendix 1 for more trade data.

The Ministry of Agriculture Adopts Export Subsidies
On March 3, 2025, the Ministry of Agriculture of the Republic of Kazakhstan adopted the order "On approval of the Rules for the payment of subsidies to reduce the cost of expenses related to the transportation of grain, and the Rules for subsidizing the expenses of a national company in the agro-industrial complex related to the transportation of grain". The document establishes export subsidies for wheat (HS 1001) from January 1 through September 1, 2025.

As reported by the press service of the Ministry of Agriculture, the main purpose of introducing subsidies is to free up elevator capacity and remove surplus grain from the market to prevent the accumulation of grain in the country.

The government intends to allocate 40 billion tenge ($79.7 million) from the national budget to subsidize the exports of 2 million tons of wheat. Depending on the export direction, the subsidy rate for transportation costs will be 20,000 ($39) or 30,000 ($59) tenge per metric ton.

Subsidies will be reimbursed for actual wheat shipments in the following directions:

- Transit through the territory of the Russian Federation in the direction of the ports of the Azov, Black and Baltic Seas – 20,000 tenge ($39) per metric ton.
- Transit through the territory of the Russian Federation, Latvia, Lithuania and Estonia in the direction of the ports of the Baltic Sea – 30,000 tenge ($59) per metric ton.
- Transit through the territory of the Russian Federation with destination in Latvia, Lithuania and Estonia – 20,000 tenge ($39) per metric ton.
- Transit through the territory of Azerbaijan and Georgia in the direction of the ports of the Black Sea – 30,000 tenge ($59) per metric ton.
- Transit through the territory of Turkmenistan with destination in Afghanistan – 20,000 tenge ($39) per metric ton.
- Transit through Turkmenistan with destination in Iran – 20,000 tenge ($39) per metric ton.
- Transit through the territory of the People's Republic of China in the direction of the countries of Southeast Asia – 30,000 tenge ($59) per metric ton.
- Transit across the Caspian to Azerbaijan, Georgia and Armenia – 20,000 tenge ($39) per metric ton.

In addition to supporting exporting companies, Kazakhstan's national grain company, the Food Corporation, also has specific subsidies to support exports. For the Food Corporation, in addition to the above-mentioned subsidy rates, subsidies in the amount of 20,000 tenge ($39) per ton will be allocated for the export of wheat to Tajikistan, Turkmenistan, Uzbekistan and China. The official text of the regulation (in Russian) is available here.

Price Updates
Local analysts report that the first week of April 2025 saw a normal seasonal strengthening trend in wheat prices. The seasonal increase is driven by strong demand from exporters amid low supply from farmers. Farmers are holding onto their wheat in anticipation of further price growth.

The average grain prices in Kazakhstan from March 31 to April 6 , 2025 were as follows:

- **3rd class wheat**: 80,000-105,000 tenge ($156-$205) per metric ton (depending on quality, EXW grain storage, with VAT)

- **Hi-pro wheat** (gluten above 29%): 120,000- 130,000 tenge per metric ton ($235-254)
- **4th class wheat**: 75,000-78,000 tenge per metric ton ($147-152)
- **5th class wheat**: 72,000-75,000 tenge per metric ton ($141-147)

Export prices included:

- **3rd class wheat (DAP Sarygash)**: $205-255 per metric ton
- **Hi-pro wheat**: $280-285 per metric ton
- **4th class wheat**: $197-201 per metric ton

The geography of exports has not changed significantly, but Azerbaijan has been added to the list of buyers. This country is a traditional buyer, although not a regular one as Kazakhstan competes with Russian wheat supplies. The last time grain was shipped to Azerbaijan was in the first half of 2023. Kazakhstan had a more competitive price for grain compared to the southern regions of Russia, where prices were significantly higher this year due to reduced production. Meanwhile, the grain price in Azerbaijan stood at approximately $210-212 per ton (111,000-112,000 tenge) landed. In contrast, the price of fourth-class grain in southern Russia was around 14,000 rubles per ton (72,000 tenge or $170), around $30 dollars higher than Kazakh origin.

In the last couple of years, Russia has increased exports of wheat to Kazakhstan. This marketing year the wheat price in Kazakhstan was nearly identical to the price of Siberian grain. However, when factoring in delivery costs to Kazakhstan and VAT, importing Russian grain becomes economically unfeasible. Siberian fourth-class grain, after including VAT and transportation costs to border elevators, would amount to approximately 78,000-80,000 tenge ($152-$156) per ton.

Additionally, unfavorable weather conditions in Siberia during August and September resulted in limited production of third-class grain. Siberian harvest was of poor quality, with high levels of sprouted wheat. Moreover, grain disease outbreaks further affected quality, leading to issues with test weight, gluten content, and the falling number (elasticity index).

As a result, high-quality grain from Siberia was in demand locally, making it impractical to export to Kazakhstan. Shipping fourth-class grain, which was priced lower, proved to be even less profitable. Additionally, the share of third-class grain in Kazakhstan was significantly higher than the previous year, accounting for approximately half of the entire harvest. Quality issues and price have largely shut off Russian exports of wheat to Kazakhstan.

Adverse Actions by Railways

Kazakhstan Railways introduced increased coefficients for services on the main railway network on March 7, 2025. These changes impacted various goods, including grain cargo and flour, with a threefold coefficient applied. As a result, the cost of shipping one wagon of wheat from Northern Kazakhstan to Uzbekistan doubled from 500,000 tenge ($980) to 1 million tenge ($1960). However, these increased export tariffs for grain and flour remained in place for only a few days. On March 11, 2025, the tariff calculation system reverted to the previous rates, excluding the coefficient. This change occurred after the government responded to concerns raised by industry associations, leading to the cancellation of the increased coefficient for exporting wheat, barley, and flour.

The railway tariff for grain and flour exports by Kazakh companies is currently much lower than the transit tariff for Russian traders shipping grain and flour to Central Asia via Kazakhstan. If

transportation costs between Kazakhstan and Russia for Central Asia deliveries were equalized, Russian agricultural products will gain a competitive advantage due to their lower average cost, ultimately displacing Kazakh grain in markets such as Uzbekistan and Kazakh flour in Afghanistan.

The introduction of the 3-fold increase coefficient for Kazakh traders essentially equalized tariffs for Russian and Kazakh exporters. This decision inadvertently supported the expansion of Russian agricultural products in Central Asian markets at the expense of Kazakh grain and flour. To protect domestic producers, the government intervened to reverse this policy.

Kazakhstan Negotiates More Rail Agreements

Kazakhstan and China plan to launch a logistics complex in Almaty in 2025, as well as open the CRK Terminal logistics center at Selyatino station in the Moscow region and a terminal at the port of Alyat in Azerbaijan. Additional logistics centers and terminals are planned for next year at Svisloch station in Belarus and in Budapest, Hungary.

These joint projects were discussed during a meeting between the Secretary of the CPC Party Committee of Xi'an and the head of Kazakhstan Railways. The parties emphasized the need for a comprehensive network of terminals along the East-West corridor by 2026, to enhance the region's transit and transport potential.

In 2024, Kazakhstan Railways reported that over 5,000 trains were dispatched from Xi'an Dry Port to Europe, accounting for 25 percent of all shipments along this route. As a key part of the Trans-Caspian corridor, Xi'an's joint cargo terminal contributed to a 33-fold increase in transportation volumes last year. In collaboration with Xi'an Dry Port, several international logistics projects are currently underway, with total investments exceeding $200 million.

While increasing terminals will help Kazakhstan export more agricultural commodities to China, multiple factors have limited Kazakh agricultural exports to China. Beijing continues to protect its local grain sector and erect non-tariff barriers on Kazakh origin products, including most recently by refusing to issue import permits through duty free rail stations. In addition, consumer goods from China are in high demand in Central Asia and able to pay higher rail tariff rates. Given still limited rail availability, most transfer stations and terminals between China and Central Asia are dominated by Chinese exports of consumer goods and not Kazakh exports of agricultural commodities.

Russia Continues to Restrict Transit of Kazakh Wheat, Lentils, and Flaxseed

On March 18, 2025, Russian Railways informed Kazakhstani railway about the introduction of a ban on the acceptance of grain cargo from Kazakhstan at all railway stations in Russia. The ban applies to wheat, lentils, and flaxseed. Exceptions are made for direct transit deliveries through the Novorossiysk, South Caucasus, and Novy Port stations, under condition that the Kazakh side issues phytosanitary certificates directly to the destination country and that there is no delay in transshipment of Kazakh grain crops into the holds of ships at the Novorossiysk Commercial Sea Port and the Sea Port of St. Petersburg. It is not yet clear how long the ban will remain in effect.

Kazakhstan Tries to Re-enter the Iranian Market

Iran has historically been a top five export destination for Kazakh wheat and wheat flour but beginning in 2024 Kazakhstan lost almost all its market share to Russia. In an effort to reinvigorate trade ties to

Iran, the first trade and economic mission of Kazakhstan this year was held in Tehran on February 14, 2025, during which preliminary agreements were reached on commercial agreements worth over $92 million. About 50 Kazakh companies in the food industry, agro-industrial complex, metallurgy, chemical, logistics industries, as well as the production of building materials and medical equipment presented their export opportunities during the mission. The participants held several meetings with Iranian partners, discussing the prospects for mutually beneficial cooperation. During the mission, QazTrade, the national trade promotion agency, identified and announced their first Partner Office in Tehran, which will promote Kazakh products on the Iranian market. Kazakhstan has exported no wheat and wheat flour to Iran during MY 2024/2025.

Import Tariffs Information

As a member of the Eurasian Economic Union (EAEU), Kazakhstan follows the EAEU Unified Customs Tariffs. The descriptions of the current edition of the nomenclature and the EAEU Customs Tariffs, as well as customs tariff rates as currently amended, can be found at EAEU Unified Customs Tariffs. The EAEU codes are similar, but not identical to the U.S. Customs Service Harmonized Code numbers. As of January 1, 2022, the EAEU Commodity Codes were updated to reflect the World Customs Organization HS Nomenclature's 2022 Edition. For instance, the import duty rate for wheat seeds imported to any of the Eurasian Economic Union countries (Russia, Kazakhstan, Belarus, Armenia, Kyrgyz Republic) is 5 percent.

Table 2. Wheat Import Tariffs

HS code	Position name	Import customs duty rate *
1001	Wheat and meslin	
1001 10	- durum wheat	
1001 11 000 0	– – seed	5%
1001 19 000 0	– – other	5%

Table 3. Wheat Production, Supply, and Distribution, April 2025 Estimate

Wheat	2023/2024		2024/2025		2025/2026	
Market Year Begins	Sep 2023		Sep 2024		Sep 2025	
Kazakhstan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	13,130	13,130	13,067	12,500		12,500
Beginning Stocks (1000 MT)	4,209	4,209	3,445	3,445		2,145
Production (1000 MT)	12,111	12,111	18,577	16,500		14,000
MY Imports (1000 MT)	2,500	2,500	500	500		500
TY Imports (1000 MT)	2,347	2,347	500	500		500
TY Imp. from U.S. (1000 MT)	0	0	0	0		0
Total Supply (1000 MT)	18,820	18,820	22,522	20,445		16,645
MY Exports (1000 MT)	7,825	7,825	10,000	10,000		7,600
TY Exports (1000 MT)	8,409	8,409	10,000	10,000		7,600
Feed and Residual (1000 MT)	2,500	2,500	3,200	3,200		3,000
FSI Consumption (1000 MT)	5,050	5,050	5,100	5,100		5,000
Total Consumption (1000 MT)	7,550	7,550	8,300	8,300		8,000
Ending Stocks (1000 MT)	3,445	3,445	4,222	2,145		1,045
Total Distribution (1000 MT)	18,820	18,820	22,522	20,445		16,645
Yield (MT/HA)	0.9224	0.9224	1.4217	1.32		1.12

(1000 HA), (1000 MT), (MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Wheat begins in July for all countries. TY 2025/2026 = July 2025 - June 2026

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

BARLEY

Production

FAS Astana expects no significant change to planting area for barley in MY 2025/2026 compared to the prior marketing year. For marketing year 2025/2026, analysts shared that fall moisture levels were sufficient, but winter precipitation was poor. Like wheat, barley production in MY 2025/2026 is forecast to fall due to poor winter precipitation and warmer than average weather.

Post estimates barley production in MY 2024/2025 at 3.8 MMT, an increase of 46 percent from MY 2023/2024 (Table 6). Like the increase in wheat production, FAS Astana bases this estimate on government reporting, data showing precipitation, field observations, and weather conditions during harvest. Many barley farmers note that they will keep planting barley in the upcoming season since barley continues to experience strong domestic demand from the feed industry. However, barley planting intentions could be challenged by a lack of barley seeds available on the market.

Most of the spring barley grown in the northern parts of Kazakhstan is feed quality barley with high protein content. The small amount of malting quality barley is grown in East Kazakhstan mainly under the contract with a large foreign malting barley distributor. The feeding barley in Kazakhstan has a slightly shorter vegetation period than wheat, is more drought resistant, and ripens in lower temperatures. Thanks to these qualities barley is popular cash crop amongst grain producers.

Consumption and Stocks

Barley feed and residuals are estimated at 1.8 MMT in MY 2024/2025 (Table 6); they are mainly used by the animal feed sector.

Since Kazakhstan's independence, the livestock sector has been systemically underinvested in, and therefore a modern feed industry is just beginning to develop. Most feed consumption currently could be described as "backyard feeding". There is only a handful of modern feedlots and Kazakhstan has a lack of feed nutritionists and laboratory infrastructure for feed quality testing. Barley in Kazakhstan is mainly used for feeding cattle, poultry and other species. Barley is also traditionally used for human consumption as a side dish.

According to official statistical data as of January 1, 2025, 46 percent of the cattle belong to individual households, 44 percent are held with family farms, and 11 percent are held by agricultural enterprises. Similar distribution exists with small ruminants, of sheep and goats: 41 percent are held by individual households, 53 percent are held by family farms, and 7 percent belong to agricultural enterprises. Please, see Table 4 for more details.

Table 4. Cattle and poultry herds as of January 1, 2025

	2025	2024	Change, %
Cattle	7,979,665	6,616,836	20.6
Including cows	4,360,372	3,658,678	19.2
Sheep	18,546,044	16,961,692	9.3
Goats	1,678,326	1,705,701	98.4

Table 4. Cont'd. Cattle and poultry herds as of January 1, 2025

	2025	2024	Change, %
Pigs	479,662	483,288	99.2
Horses	4,353,028	3,851,185	13.0
Camel	280,522	264,936	5.9
Poultry	45,650,899	44,174,218	3.3

Source: Bureau of National Statistics Report for 2024

Trade

In MY 2024/2025, FAS Astana estimates barley exports at 1.7 million metric tons, (Table 6). This estimate is based on competitive export prices and restored exports to Iran, as well as stable but slightly lower demand in Uzbekistan and China. Unlike wheat, Kazakhstan's barley export destination are all nearby and thus farmers are not deterred by not having an export subsidy.

According to market analyst, the average barley prices in Kazakhstan from March 31 to April 6 were 81,000-85,000 tenge per metric ton ($158-166) on EXW grain storage conditions, $215 per metric ton for shipments to Central Asia or China, and $230 per metric ton at the port of Aktau on the Caspian Sea (FOB).

During July 2024 to January 2025 barley exports to Iran resumed and reached 655,387 metric tons, an over 2000 percent increase. Barley exports to Tajikistan dramatically increased but by not as much, while barley exports to China fell. These trends are attributable Kazakhstan's price competitiveness when compared to Russia. Please, see Appendix 2 for more trade data.

Import Tariffs Information
As a member of the Eurasian Economic Union (EAEU), Kazakhstan follows the EAEU Unified Customs Tariffs. The descriptions of the current edition of the nomenclature and the EAEU Customs Tariffs, as well as customs tariff rates as currently amended, can be found at EAEU Unified Customs Tariffs. The EAEU codes are similar, but not identical to the U.S. Customs Service Harmonized Code numbers. As of January 1, 2022, the EAEU Commodity Codes were updated to reflect the World Customs Organization HS Nomenclature's 2022 Edition. For instance, the import duty rate for barley seeds imported to any of the Eurasian Economic Union country (Russia, Kazakhstan, Belarus, Armenia, Kyrgyz Republic) is 5 percent. Please, see Table 5 below.

Table 5. Barley Import Tariffs

HS code	Position name	Import customs duty rate *
1003	Barley	
1003 10 000 0	- seed	5%
1003 90 000 0	- other	5%

Table 6. Barley Production, Supply, and Distribution, April 2025 Estimate

Barley	2023/2024		2024/2025		2025/2026	
Market Year Begins	Jul 2023		Jul 2024		Jul 2025	
Kazakhstan	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Area Harvested (1000 HA)	2,425	2,425	2,283	2,283		2,200
Beginning Stocks (1000 MT)	413	413	202	202		342
Production (1000 MT)	2,614	2,614	3,840	3,840		3,400
MY Imports (1000 MT)	300	300	100	100		200
TY Imports (1000 MT)	233	233	100	100		200
TY Imp. from U.S. (1000 MT)	0	0	0	0		0
Total Supply (1000 MT)	3,327	3,327	4,142	4,142		3,942
MY Exports (1000 MT)	1,225	1,225	1,700	1,700		1,800
TY Exports (1000 MT)	1,399	1,399	1,600	1,600		1,600
Feed and Residual (1000 MT)	1,600	1,600	1,800	1,800		1,750
FSI Consumption (1000 MT)	300	300	300	300		300
Total Consumption (1000 MT)	1,900	1,900	2,100	2,100		2,050
Ending Stocks (1000 MT)	202	202	342	342		92
Total Distribution (1000 MT)	3,327	3,327	4,142	4,142		3,942
Yield (MT/HA)	1.0779	1.0779	1.682	1.682		1.5455

(1000 HA), (1000 MT), (MT/HA)
MY = Marketing Year, begins with the month listed at the top of each column
TY = Trade Year, which for Barley begins in October for all countries. TY 2025/2026 = October 2025 - September 2026

OFFICIAL DATA CAN BE ACCESSED AT: PSD Online Advanced Query

Attachments:

No Attachments

Appendix 1: Kazakhstan Wheat and Wheat Flour Exports 2022-2024 (MT)

Partner Country	Rank	Unit	Year Ending (UOM1: T)			Year to Date		
			2022	2023	2024	09/23-01/24	09/24-01/25	%Δ
World		T	7,469,615	10,094,172	7,116,464	3,442,840	4,262,068	24
Uzbekistan	1	T	3,006,901	4,444,912	3,270,272	1,508,581	2,116,993	40
Afghanistan	2	T	1,587,600	2,103,590	1,448,249	753,128	804,435	7
Tajikistan	3	T	947,481	1,160,926	1,097,823	509,672	620,137	22
China	4	T	28,600	425,773	621,094	193,636	142,466	-26
Italy	5	T	295,239	449,623	342,410	242,452	113,304	-53
Turkmenistan	6	T	474,388	589,625	172,057	135,420	54,793	-60
Kyrgyzstan	7	T	21,303	26,962	68,675	34,743	107,668	210
Russia	8	T	111,795	58,321	44,512	16,627	16,946	2
Turkey	9	T	122,054	155,713	16,928	16,862	2,154	-87
Latvia	10	T	7,051	54,206	9,669	9,629	27,430	185
Belgium	11	T	42	1,778	8,187	8,187	0	-100
Norway	12	T	3,000	7,160	4,791	3,000	3,000	0
Greece	13	T	4,521	3,107	4,663	4,663	0	-100
Denmark	14	T	0	3,000	2,700	2,700	0	-100
Azerbaijan	15	T	192,430	276,213	2,575	2,575	229,836	8826
Georgia	16	T	4,955	860	491	216	7,750	3488
Belarus	17	T	577	417	380	173	86	-50
Iraq	18	T	65	1,151	340	204	0	-100
Armenia	19	T	89	142	200	179	123	-31
Mongolia	20	T	507	350	155	67	184	175
Pakistan	21	T	0	0	70	0	0	0
United Arab Emirates	22	T	3	44	42	42	0	-100
Spain	23	T	0	30,186	40	0	0	0
Lithuania	24	T	0	97	36	25	2	-92
South Korea	25	T	12	0	25	12	0	-100
Poland	26	T	13,279	12,484	21	0	606	0
Israel	27	T	136	32	19	9	11	22
Germany	28	T	119	225	19	15	60	300
Iran	29	T	630,910	163,429	14	14	0	-100

Source: Trade Data Monitor, LLC

Appendix 2: Kazakhstan Barley Exports 2022-2024 (MT)

Partner Country	Rank	Unit	Year Ending (UOM1: T)			Year to Date		
			2022	2023	2024	07/23-01/24	07/24-01/25	%Δ
World		T	420,813	1,112,775	1,225,326	851,697	1,356,344	59
China	1	T	82,621	426,811	927,751	669,819	509,333	-24
Uzbekistan	2	T	100,329	160,409	165,635	104,387	102,910	-1
Iran	3	T	189,404	436,327	62,027	28,703	655,387	2183
Tajikistan	4	T	39,539	70,370	54,068	35,936	55,811	55
Afghanistan	5	T	4,544	11,821	11,097	10,876	17	-100
Kyrgyzstan	6	T	2,174	0	3,236	666	90	-86
Russia	7	T	0	2,667	984	984	0	-100
Oman	8	T	0	257	256	256	399	56
Azerbaijan	9	T	0	0	204	0	24,912	0
Pakistan	10	T	0	68	69	69	0	-100
Netherlands	11	T	0	0	0	0	0	0
Turkey	12	T	418	154	0	0	0	0
Turkmenistan	13	T	804	0	0	0	0	0
United Kingdom	14	T	979	0	0	0	0	0
Belarus	15	T	0	0	0	0	0	0
United Arab Emirates	16	T	0	0	0	0	0	0
Iraq	17	T	0	3,780	0	0	7,484	0
Israel	18	T	0	0	0	0	0	0
Czech Republic	19	T	0	0	0	0	0	0
Syria	20	T	0	110	0	0	0	0

Source: Trade Data Monitor, LLC