Required Report: Required - Public Distribution **Date:** March 05, 2025

Report Number: KZ2025-0002

Report Name: Grain and Feed Update

Country: Kazakhstan - Republic of

Post: Astana(Nur-Sultan)

Report Category: Grain and Feed

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Report Highlights:

Kazakhstan's total wheat production has been revised up to 16.5 million metric tons as good weather during last year's summer vegetative period resulted in a larger than average crop. Barley production estimates are raised slightly to 3.8 million metric tons. Rains and cold weather in September adversely affected both wheat and barley quality. The larger than average crop is seeing Kazakhstan's total exports surge, with higher quantity available and lower prices helping it recover market share from Russia around the Caspian Sea and in Central Asia. Despite positive steps towards calming bilateral agricultural trade tensions, Russia remains effectively shut to almost all Kazakh grain exports.

WHEAT

Production

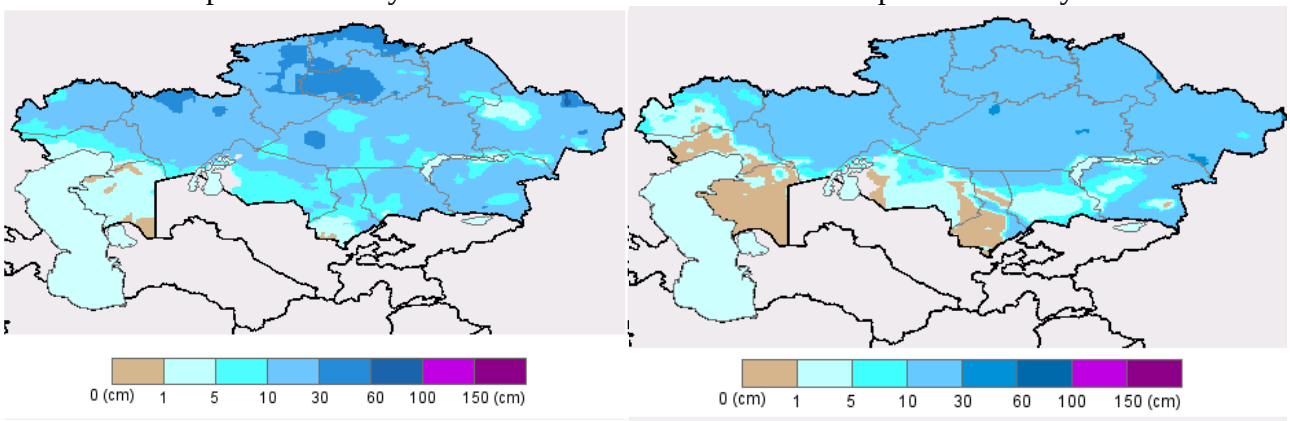
FAS Astana estimates wheat production in MY 2024/2025 at 16.5 million metric tons (Table 1), a 26 percent increase from the previous marketing year. Wheat yields in MY 2024/25 are estimated at 1.32 tons per hectare, a 43 percent increase from the previous marketing year.

Less Snow Poses Risks to MY 2025/2026 Crop

While it is too early to tell how the 2025/2026 crop will develop, Kazakhstan has experienced an abnormally mild winter. According to USDA FAS Crop Explorer data, snow depth in the three northern grain producing regions is smaller in February 2025 than February 2024 (Figure 1). To prevent the impact of flooding the regional governments conduct controlled ice blowing and monitor the water levels in big lakes. Soil precipitation levels are critical to healthy vegetation during the dry and hot summer months and less now could impact crop production in MY 2025/2026 to the downside. Less winter kill could also pose increased risks of pests and diseases.

Figure 1. Snow Depth in February 2024 and February 2025

Snow depth in February 2024 | Snow depth in February 2025



Source: USDA FAS Crop Explorer

The MY 2024/2025 Government Production Estimate

On January 30, 2025, the Bureau of National Statistics published the final report of area planted, area harvested, production, and yields for main crops. Wheat and barley both experienced lower harvested than planted acres, reflecting the impact of rains during the fall harvest. Total planted and harvested area for wheat and barley fell when compared to the previous marketing year, reflecting poor price prospects. Oilseeds (primarily rapeseed and sunflower) offset the fall in wheat and barley, suggesting Kazakh farmers switched from less profitable grains to more profitable oilseeds. This was reinforced by interviews with farmers by FAS Astana.

Table 1. Main Crops Area Planted and Harvested

Crop	Area planted, ha		Area harvested, ha	
	MY24/25	Percent Change Versus MY 23/24	MY24/25	Percent Change Versus MY 23/24
WHEAT winter and spring	13,199,569	-4.1	13,067,081	-0.5
CORN	162,813	-17	162,164	-14.8
BARLEY winter and spring	2,310,732	-10.1	2,283,245	-5.8
RYE winter and spring	20,611	-4.5	20,444	-2.8
OAT	195,608	-9.5	193,198	1.3
SORGHUM	20,653	14.4	19,334	23.8
RICE	98,350	-1.7	98,190	-1.8
OILSEEDS	2,898,600	3	2,735,102	10.6
COTTON	106,411	-8.7	106,411	-8.7

Source: Kazakhstan's Statistical Service Final Report, Jan 31, 2024

The Bureau reported wheat production at 18.5 MMT in MY 2024/2025, a 53 percent increase from the prior year due to favorable weather conditions and excessive precipitation conditions in August-September 2024. Similarly, barley production was reported at 3.8 MMT in MY 2024/2025, also a 47 percent increase from last MY (Table 2). This estimate would make this the largest wheat crop in over a decade. Given crop quality issues and weather during harvest, as well as field observations, Post has a lower estimate. Independent analysis by the industry reports to FAS Astana that production is higher than the 5-year average but lower than the Bureau's forecast.

Table 2. Main Crops Production and Yields

Crop	Production, tons (weight after cleaning)		Yields, ton/ha	
	MY24/25	MY24/25 to MY23/24, %	MY24/25	MY24/25 to MY23/24, %
WHEAT winter and spring	18,576,694	53.4	1.42	54.3
BARLEY winter and spring	3,839,683	46.9	1.68	55.6
RYE winter and spring	31,285	75.4	1.53	80.0
OAT	329,814	120.3	1.71	116.5
SORGHUM	20,959	77.0	1.08	42.1
RICE	512,982	5.7	5.22	7.6
OILSEEDS	3,337,552	52.8	1.22	38.6

Source: Kazakhstan's Statistical Service Final Report, Jan 31, 2024

Consumption and Stocks

FAS Astana estimates wheat consumption for MY 2024/2025 at 5.1 million metric tons (Table 5), 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 the grain warehouse receipts is reported by licensed elevators. There are 232 licensed elevators in Kazakhstan, which handle grain warehouse receipts. As of February 18, 2025, grain silos were at 39 percent capacity and there was free storage capacity of 8 million tons. Please, see Table 3 below.

Table 3. 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	5,253,288	39%	8,007,711
Karaganda region	132,500	69,172	52%	63,327
East-Kazakhstan region	313,700	79,671	25%	234,028
North-Kazakhstan region	3,361,800	1,546,387	45%	1,815,412
Almaty region	62,600	3,076	4%	59,523
Kostanay region	3,031,900	1,264,273	41%	1,767,626
Akmola region	4,541,100	1,946,642	42%	2,617,457
Aktobe region	385,800	96,302	24%	289,479
Pavlodar region	277,300	93,530	33%	183,769
West-Kazakhstan region	634,800	75,613	11%	559,186
Abay region	199,500	25,048	12%	174,451
Astana city	243,000	46,193	19%	196,806
Almaty city	-	-	0%	-
Atyrau region	-	-	0%	-
Jambyl region	-	-	0%	-
Kyzylorda region	40,000	-	0%	40,000
Mangystau region	-	-	0%	-
Zhetysu region	14,000	-	0%	14,000
Ulytau region	-	-	0%	-
Turkestan region	-	-	0%	-
Shymkent city	-	-	0%	-

Source: Grain Receipts Digital Platform Qoldau

Trade

Based on the increase in wheat production and strong demand from China, FAS Astana estimates wheat and wheat flour exports for MY 2024/2025 to be 10 MMT, (Table 5), a 27 percent increase from the previous year. Wheat exports since the beginning of MY 2024/2025 (September to November 2024) are reported at 2.376 million metric tons, or an 11 percent increase from the same period last marketing year.

According to Kazakhstan Temir Zholy, Kazakhstan's national rail operator, the export volume of new crop grain from September to December 2024 reached 4 million tons, marking a 57 percent increase

compared to the same period in 2023. Kazakhstan remains dependent on export terminals in Aktau and Kuryk along the Caspian and rail terminals with other Central Asia countries and China for nearly all exports. Due to strong price pressure from Russia and other factors, in 2023 Kazakhstan saw its exports to traditional markets like Afghanistan, Azerbaijan, Iran, and the Kyrgyz Republic plummet, largely being replaced by Russian origin wheat. However, the large MY 2024/2025 crop and low prices have allowed Kazakhstan to regain significant market share in Central Asia and the Caspian. Uzbekistan has always been the most reliable purchaser of Kazakh wheat, with proximity giving Kazakhstan a strong rail tariff advantage versus Russia. Exports have now recovered to most of Kazakhstan's traditional wheat trade partners (See Appendix 1).

Kazakhstan Negotiates More Rail Agreements

In Almaty, representatives from the Islamic Republic of Iran Railways, Kazakhstan Temir Zholy rail, Russian Railways, and Turkmen Railways concluded a two-day meeting on improving cross boundary rail movements. During the discussions, they reviewed cargo transportation results through Kazakhstan via the Bolashak border station, where the 2024 freight volume reached 1.6 million tons. The focus was on enhancing the attractiveness of the North-South international transport corridor. They considered favorable through-tariff conditions for transportation across Russia, Kazakhstan, Turkmenistan, and to the Iranian port of Bandar Abbas. The parties expressed readiness to increase freight volumes along this route and further strengthen mutual cooperation. At the end of the meeting, a protocol on the agreements reached was signed. Iran uses different rail gauges than the soviet gauge in Central Asia and Russia, causing costly rail changeovers that have historically limited transportation along the corridor.

Grain Transit Restrictions by Russia Still Effectively in Place

Russia and Kazakhstan continued to impose various trade restrictions on the grain trade in MY2023/2024 and MY2024/2025 as Russia tries to get better access to Central Asia and Kazakhstan tries to increase exports to European countries and the Caucuses.

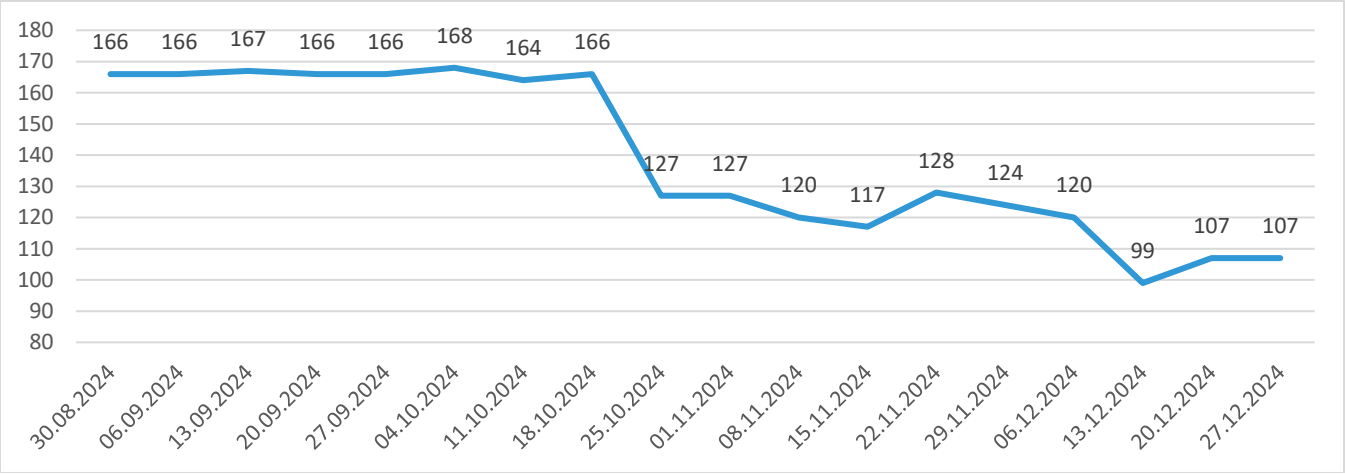
According to Rosselkhoznadzor, temporary restrictions on the import of wheat, lentils and flaxseeds from Kazakhstan to Russia, introduced on October 17, 2024, are still in effect. However, after a February 2025 meeting in Moscow, transit of these products was permitted if Kazakhstan issues a phytosanitary certificate directly to the country of final destination and transships the grain from railway cars immediately to a ship's hold, with no delay at port. Given the grain cannot be staged prior to loading onto a vessel, this agreement has proved difficult to implement in practice and few grain shipments from Kazakhstan have successfully transited Russia since the February agreement was reached.

The transit of the above-mentioned grain products of Kazakh origin to third countries through the territory of Russia is possible only through certain seaports, the infrastructure of which allows for direct transshipment of grain to a vessel. According to Russia, this is necessary to eliminate the risk of the spread of quarantine pests throughout the territory of Russia. It is also reported that Rosselkhoznadzor is working with the State Inspection Committee in the Agro-Industrial Complex of the Ministry of Agriculture of Kazakhstan to develop specific measures aimed at compliance with the quarantine phytosanitary requirements of the EAEU when supplying grain products of Kazakh origin to Russia. However, the trade in Kazakhstan larger interprets these measures as having less to do with phytosanitary concerns and more retaliatory for Kazakhstan's own now expired restrictions on wheat from all origins that primarily targeted Russian.

Kazakhstan Allows Wheat Import Restrictions on Russia to Expire
As of January 1, 2025, import restrictions on Russian wheat and wheat from all origins have been lifted. On August 21, 2024, Kazakhstan escalated bilateral trade concerns by expanding an existing ban on wheat trucks to include wheat from all origins in all transportation methods. The Government of Kazakhstan's (GOK's) actions were intended to reduce Russian wheat imports and further limit the black-market trade. The order aimed at tightening existing restrictions on Russian wheat to relieve growing price pressure ahead of Kazakhstan's own anticipated large fall harvest. The order was set to expire on December 31, 2024, and the GOK did not extend it. Please refer to the decision, the corresponding Order of the Minister of Agriculture of the Republic of Kazakhstan dated August 19, 2024 No. 278 "On Certain Issues of Import of Wheat into the Territory of the Republic of Kazakhstan."

Kazakh Wheat Prices Drop Due to Lower Quality and Higher Quantity
The average Kazakh wheat price at ex works (EXW) were reported at $166 to 168 per metric ton between September through mid-October 2024, as the market was optimistic about the quality of wheat prior to harvest. However, prices dropped to $127 when first tests showed lower quality than expected (See Chart 1).

Chart 1. Average wheat price, EXW, North Kazakhstan, USD per metric ton



Source: Grain and Oilseeds portal margin.kz

An abundance of wheat has caused prices to fall and forced the Ministry of Agriculture to react with preferential financial vehicles to keep farmers afloat. The volume of preferential loans allocations in MY 2024/2025 reached 580 billion tenge ($1.2 billion) at a 5 percent annual interest, compared to a maximum of 160 billion tenge ($320 million) in previous years. However, Post has been informed that payments to farmers have been significantly delayed and are now expected in spring 2025. For instance, as of the end of November 2024, the subsidy debt to farmers stood at 194.8 billion tenge ($389 million), despite the 580 billion tenge allocation. The Ministry of Finance stated that clearing debts on loans by farmers would be allocated in stages, including the deferral of payments to 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 4. Import Tariffs for Kazakhstan

HS code	Position name	Additional units of measurement	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 5. Wheat Production, Supply, and Distribution, February 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)	13130	13130	13067	12500	0	12500
Beginning Stocks (1000 MT)	4209	4209	3445	3445	0	2145
Production (1000 MT)	12111	12111	18577	16500	0	14000
MY Imports (1000 MT)	2500	2500	500	500	0	500
TY Imports (1000 MT)	2347	2350	500	500	0	500
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	18820	18820	22522	20445	0	16645
MY Exports (1000 MT)	7825	7825	10000	10000	0	7600
TY Exports (1000 MT)	8409	8409	10000	10000	0	7600
Feed and Residual (1000 MT)	2500	2500	3200	3200	0	3000
FSI Consumption (1000 MT)	5050	5050	5100	5100	0	5000
Total Consumption (1000 MT)	7550	7550	8300	8300	0	8000
Ending Stocks (1000 MT)	3445	3445	4222	2145	0	1045
Total Distribution (1000 MT)	18820	18820	22522	20445	0	16645
Yield (MT/HA)	0.9224	0.9224	1.4217	1.32	0	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 2024/2025 compared to the prior marketing year. Post estimates barley production in MY 2024/2025 to be 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 form the feed industry. However, barley planting intentions could be challenged by a lack of barley seeds available on the market.

Consumption and Stocks

Barley feed and residuals, which is mainly used for animal feed, is estimated at 1.8 MMT in MY 2024/2025.

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 5 below.

Table 5. Cattle and Poultry Herds as of January 1, 2025

	2025	2024	Change, %
Cattle	8,039,427	6,664,593	20%
Including Cows	4,359,128	3,672,880	18%
Sheep	18,528,336	16,930,230	9%
Goats	1,682,335	1,745,269	-4%
Pigs	498,703	504,373	-2%
Horses	4,309,425	3,841,928	12%
Camel	278,748	263,744	5%
Poultry	45,990,901	45,158,685	1%

Source: Bureau of National Statistics Livestock report as of January 1, 2025

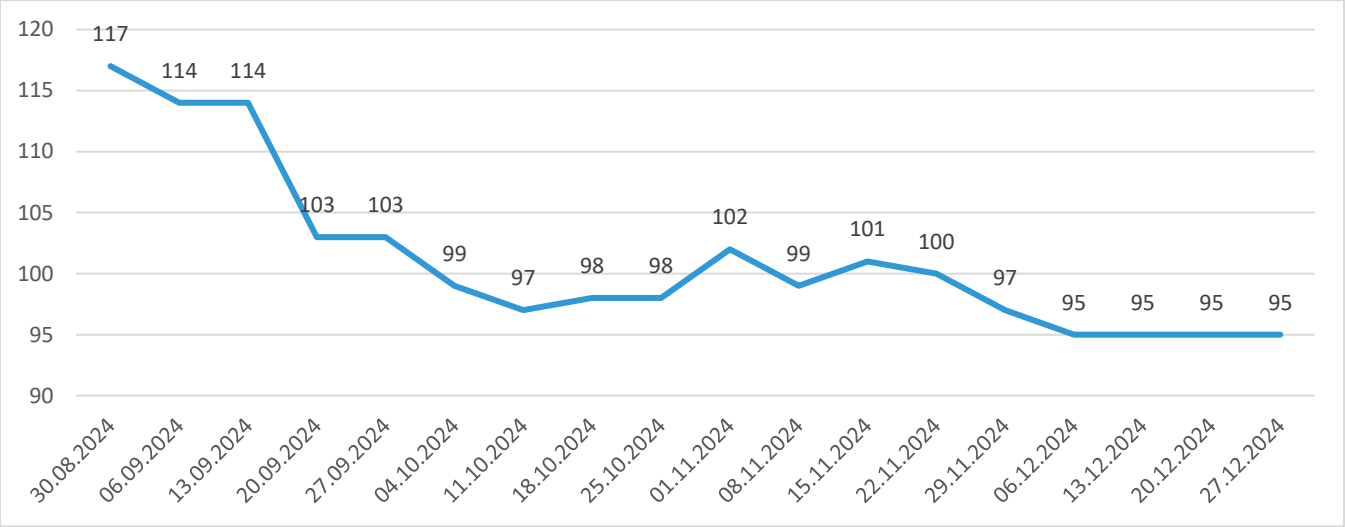
Trade

In MY 2024/2025, FAS Astana estimates barley exports at 1.8 million metric tons, (Table 2). This estimated is based on competitive export prices and a resumption of demand from Iran and stable but slightly lower demand in Uzbekistan and China.

Trade data reflects that Kazakhstan exported 953,179 MT of barley in MY 2024/2025 (year-over-year, July-November), a nearly 45 percent increase from the same period last marketing year due to resumed exports to Iran (Appendix 2). While China's imports have fallen slightly since the beginning of the marketing year by 18 percent, Iran has made up for this fall by quickly becoming the second largest total importer of Kazakh barley. Uzbekistan imports are reported as slightly lower at 67,630 MT, a 7 percent decrease from the previous year, but remain within historic trends. For more information, please, see Appendix 2.

The average barley price at EXW conditions have dropped significantly from $114 per metric ton in early September 2024 to $95 at the end of December 2024 (See Chart 2).

Chart 2. Average barley price at EXW elevator in North Kazakhstan, USD per metric ton



Source: Grain and Oilseeds portal margin.kz

Import Tariffs Information

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HS code	Position name	Additional units of measurement	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, February 2025

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)	2425	2425	2283	2283	0	2200
Beginning Stocks (1000 MT)	413	413	202	202	0	392
Production (1000 MT)	2614	2614	3840	3840	0	3400
MY Imports (1000 MT)	300	325	100	200	0	200
TY Imports (1000 MT)	233	250	100	200	0	200
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	3327	3352	4142	4242	0	3992
MY Exports (1000 MT)	1225	1200	1700	1800	0	1800
TY Exports (1000 MT)	1399	1300	1600	1600	0	1600
Feed and Residual (1000 MT)	1600	1650	1800	1750	0	1750
FSI Consumption (1000 MT)	300	300	300	300	0	300
Total Consumption (1000 MT)	1900	1950	2100	2050	0	2050
Ending Stocks (1000 MT)	202	202	342	392	0	142
Total Distribution (1000 MT)	3327	3352	4142	4242	0	3992
Yield (MT/HA)	1.0779	1.0779	1.682	1.682	0	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						

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	09/23-11/23	09/24-11/24	%Δ
World		T	7,469,615	10,094,172	7,116,464	2,140,823	2,376,872	11
Uzbekistan	1	T	3,006,901	4,444,912	3,270,272	926,812	1,184,982	28
Afghanistan	2	T	1,587,600	2,103,590	1,448,249	475,359	490,023	3
Tajikistan	3	T	947,481	1,160,926	1,097,823	304,579	361,559	19
China	4	T	28,600	425,773	621,094	134,744	106,681	-21
Italy	5	T	295,239	449,623	342,410	119,331	34,538	-71
Turkmenistan	6	T	474,388	589,625	172,057	117,714	25,081	-79
Kyrgyzstan	7	T	21,303	26,962	68,675	11,570	54,481	371
Russia	8	T	111,795	58,321	44,512	11,135	10,927	-2
Turkey	9	T	122,054	155,713	16,928	16,862	2,154	-87
Latvia	10	T	7,051	54,206	9,669	9,369	20,081	114
Belgium	11	T	42	1,778	8,187	2,730	0	-100
Norway	12	T	3,000	7,160	4,791	0	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	2,527	82,987	3184
Georgia	16	T	4,955	860	491	177	138	-22
Belarus	17	T	577	417	380	130	65	-50
Iraq	18	T	65	1,151	340	204	0	-100
Armenia	19	T	89	142	200	77	21	-73
Mongolia	20	T	507	350	155	48	86	79
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	13	2	-85
South Korea	25	T	12	0	25	12	0	-100
Poland	26	T	13,279	12,484	21	0	0	0
Israel	27	T	136	32	19	0	11	0
Germany	28	T	119	225	19	9	49	444
Iran	29	T	630,910	163,429	14	7	0	-100
Moldova	30	T	357	53	8	8	0	-100
Malaysia	31	T	0	0	0	0	0	0
Malta	32	T	4,877	0	0	0	0	0
Lebanon	33	T	0	0	0	0	0	0
Japan	34	T	0	0	0	0	0	0

Appendix 1: Kazakhstan Wheat and Wheat Flour Exports 2022-2024 (MT) Cont'd.

Partner Country	Rank	Unit	Year Ending (UOM1: T)			Year to Date		
			2022	2023	2024	09/23-11/23	09/24-11/24	%Δ
Portugal	35	T	0	9,017	0	0	0	0
Romania	36	T	0	0	0	0	0	0
Sweden	37	T	0	10,500	0	0	0	0
Switzerland	38	T	2,611	0	0	0	0	0
Hungary	39	T	0	0	0	0	0	0
Finland	40	T	1,540	0	0	0	0	0
Chad	41	T	84	0	0	0	0	0
Netherlands	42	T	0	430	0	0	7	0
Tunisia	43	T	0	103,841	0	0	0	0
United Kingdom	44	T	7,000	0	0	0	0	0
Ukraine	45	T	89	5	0	0	0	0
United States	46	T	0	0	0	0	0	0

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	07/23-11/23	07/24-11/24	%Δ
_World		T	420,813	1,112,775	1,225,326	657,175	953,179	45
China	1	T	82,621	426,811	927,751	534,220	436,087	-18
Uzbekistan	2	T	100,329	160,409	165,635	72,801	67,630	-7
Iran	3	T	189,404	436,327	62,027	14,454	391,463	2608
Tajikistan	4	T	39,539	70,370	54,068	25,000	43,321	73
Afghanistan	5	T	4,544	11,821	11,097	9,144	17	-100
Kyrgyzstan	6	T	2,174	0	3,236	246	0	-100
Russia	7	T	0	2,667	984	984	0	-100
Oman	8	T	0	257	256	256	0	-100
Azerbaijan	9	T	0	0	204	0	12,857	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	1,804	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

Attachments:

No Attachments