

## باسمه تعالی

### خلاصه‌ای از گزارش جامع صنعت کشاورزی قزاقستان

وزارت کشاورزی جمهوری قزاقستان در قالب کتابچه‌ای، گزارشی جامع از صنعت کشاورزی این کشور منتشر نموده است. یکی از اهداف تهیه این گزارش ارائه تصویری از بازیگران اصلی بازار کشاورزی در قالب تولید محصولات مهم بین‌المللی در حوزه کشاورزی جمهوری قزاقستان است. بعلاوه از امتیازات بزرگ این گزارش که در قالب اینفوگرافی تهیه شده است ارائه دقیقی از آمارها در قالب جداول و گرافها است. لزوم توجه به این گزارش از چند بُعد حائز اهمیت است: ۱- ارائه تصویری دقیق از ظرفیت‌های کشاورزی قزاقستان به تفکیک مناطق، ۲- شناخت نهادهای ذیربط داخلی در زمینه کار در حوزه‌ی کشاورزی با قزاقستان، ۳- ارائه تصویر دقیق از ظرفیت‌های صادراتی و نیازهای وارداتی قزاقستان در زمینه کشاورزی و ۴- بانک اطلاعاتی جامع در زمینه اولویت‌سازی تجاری برای کار با قزاقستان. این گزارش دارای ۵ بخش اصلی است که به ترتیب عبارتند از: ۱- تجارت کشاورزی در قزاقستان، ۲- تولیدات محصولات زراعی، ۳- محصولات دامی، ۴- فرآوری غذایی و ۵- زیرساخت‌ها و تجهیزات مالی. این گزارش از حیث ارائه اطلاعات بسیار دقیق به تفکیک در ۱۷ استان قزاقستان در زمینه‌های مذکور دارای اهمیت می‌باشد. بعلاوه نام ۲۰ هلدینگ مهم در عرصه کشاورزی قزاقستان در این گزارش مطرح گردیده است. لزوم بررسی این گزارش بالاخص برای شرکت‌هایی که در قالب خدمات فنی-مهندسی در عرصه کشاورزی و همینطور سایر شرکت‌های ایرانی برای کار در قزاقستان از آن جهت است، که با بررسی کامل در هر ۵ حوزه مطرح، می‌توانند منطقه و حوزه کاری مورد نظر خود را بر اساس آمار دقیق میدانی که از جانب کشور مقصد منتشر گردیده شناسایی کنند. این گزارش در ۵ بخش تهیه شده است که عبارت است از:

#### بخش ۱: تجارت کشاورزی قزاقستان

- نقش تجارت کشاورزی در اقتصاد قزاقستان
- جایگاه قزاقستان در سطح بین‌المللی
- تولیدات اصلی مجتمع‌های صنعتی کشاورزی در سال ۲۰۲۲ در مقیاس میلیون تن
- جغرافیای صادرات صنعت کشاورزی به میلیون دلار
- صندوق ارضی قزاقستان

#### بخش ۲: تولیدات محصولات زراعی

- تولید محصولات کشاورزی
- مناطق تحت کشت در قزاقستان
- محصولات اصلی کشاورزی گندم
- جو

- ذرت و غلات
- تولید دانه‌های روغنی آفتابگردان
- تولید دانه‌های روغنی بذر کتان
- صیفی جات و سبزیجات تولیدات و تجارت
- میوه تولید
- تجارت
- آبیاری در قزاقستان

### بخش ۳: محصولات دامی

- آمار حیوانات اهلی قزاقستان
- تولیدات گوشت احشام
- تجارت گوشت احشام
- مزارع لبنی: حیوانات اهلی
- تولیدات تجارت دامپروری در قزاقستان
- تامین خوراک در قزاقستان
- زیرساخت‌های موجود برای نگهداری از حیوانات در تولیدات کشاورزی و
- شیلات در قزاقستان

### بخش ۴: فرآوری غذایی

#### فرآوری غذایی

- تولیدات محصولات اصلی غذایی در قزاقستان محصولات فرآوری شده در حوزه تجارت

### بخش ۵: زیرساخت‌ها و تجهیزات مالی

- زیر ساخت و سرمایه‌گذاری
- محصولات محافظت از گیاه
- کودها دانه‌ها زیرساخت‌های نگهداری و انبار ماشین آلات کشاورزی سرمایه‌گذاری در تجارت کشاورزی
- اعطای وام به بخش کشاورزی

#### منابع:

Eldala.kz FAOSTAT, Trade Map • United States Department of Agriculture (USDA) • Bureau of National Statistics of Kazakhstan • Land Resources Management Committee of the Ministry of Agriculture of Kazakhstan • Ministry of Agriculture of Kazakhstan • Republican Chamber of Dairy and Mixed Breeds Cattle

Infographic Report

# KAZAKHSTAN



# AGRIBUSINESS



# 2022

## TABLE OF CONTENTS

### Agribusiness of Kazakhstan

- 4 Agribusiness role in Kazakhstan's economy
- 5 Kazakhstan's place on the world map
- 6 Main products of the agro-industrial complex in 2022, mln t
- 7 Foreign trade of agricultural products
- 8 Geography of agro-industrial exports, \$ mln
- 9 Land fund of Kazakhstan

### Crop production

- 11 Sown areas of Kazakhstan
- 12 Main crops production
- 13 Grain crops production: wheat
- 14 Grain crops production: barley
- 15 Grain crops production: corn for grain
- 16 Oilseed crops production: flaxseed
- 17 Oilseed crops production: sunflowerseed
- 18 Vegetables: production
- 19 Vegetables: trading
- 20 Fruits and berries: production
- 21 Fruits and berries: trading
- 22 Irrigation in Kazakhstan

### Livestock production

- 24 Number of farm animals
- 25 Meat livestock: production
- 26 Meat livestock: trade
- 27 Dairy farming: pedigree animals
- 28 Dairy farming: production
- 29 Dairy farming: trade
- 30 Poultry farming in Kazakhstan
- 31 Feed supply in Kazakhstan
- 32 Infrastructure for animal housing in agricultural enterprises
- 33 Fishery in Kazakhstan

### Food processing

- 35 Production of main types of foodstuffs in Kazakhstan
- 36 Processed products: trade

### Infrastructure and finance

- 38 Plant protection products
- 39 Fertilisers
- 40 Seeds
- 41 Warehouse infrastructure
- 42 Agricultural machinery
- 43 Investments in agribusiness
- 44 Lending to the agribusiness sector

### The purpose of this handbook

The purpose of this handbook is to provide agricultural market players with a universal product that will help in making management decisions and will give an opportunity to show the results of the agricultural sector and the place of Kazakhstan in the global market.

### Why infographics?

Viewing infographics does not require a lot of time and allows you to perceive large amounts of data about the agro-sector of Kazakhstan in an easy and understandable form.

### Data sources:

- EIDala.kz
- FAOSTAT
- Trade Map
- United States Department of Agriculture (USDA)
- Bureau of National Statistics of Kazakhstan
- Land Resources Management Committee of the Ministry of Agriculture of Kazakhstan
- Ministry of Agriculture of Kazakhstan
- Republican Chamber of Dairy and Mixed Breeds Cattle

Data may vary as each organization has its own calculation methodology. Some data in last year's handbook may differ due to changes in data collection sources and calculation methods.

# AGRIBUSINESS OF KAZAKHSTAN





## AGRIBUSINESS ROLE IN KAZAKHSTAN'S ECONOMY

## AGRIBUSINESS OF KAZAKHSTAN

### Gross output of products (services) of agro-industrial complex, mln tenge



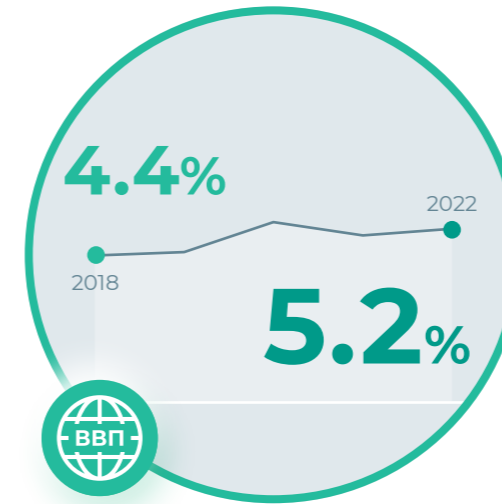
Gross output is the total value of all goods and services produced by the economy in a year, including intermediate consumption goods and services.

### Index of physical volume of gross agricultural products (services)



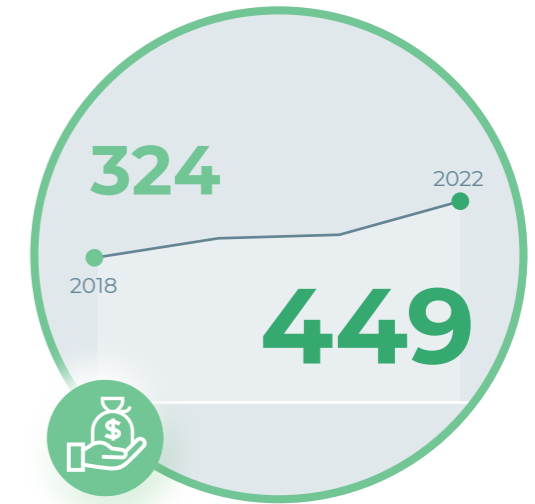
The index shows the change in output in real terms, i.e. adjusted for inflation.

### Share of agro-industrial complex in Kazakhstan's GDP



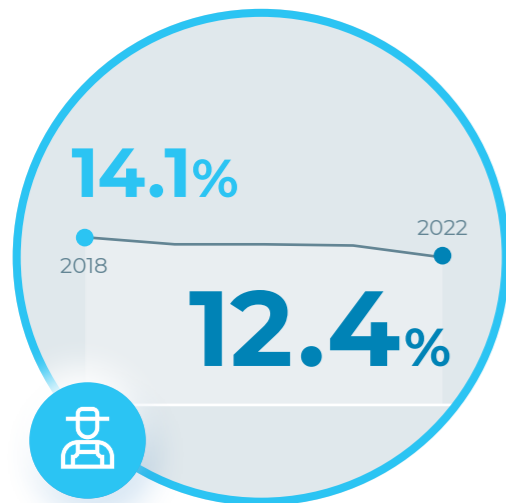
The share of agriculture in Kazakhstan's GDP increased in 2022 against the background of advanced growth rates compared to other sectors of the national economy.

### State support of the agro-industrial complex, bln tenge

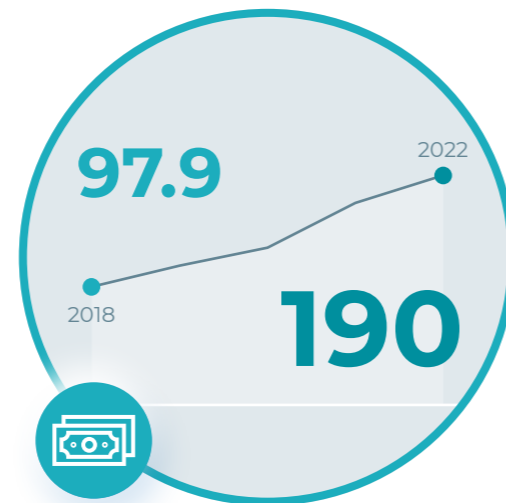


Agricultural labor productivity in Kazakhstan has doubled over the past five years. However, the average monthly wage remains only 61% of the average in other sectors.

### Population employed in agro-industrial complex



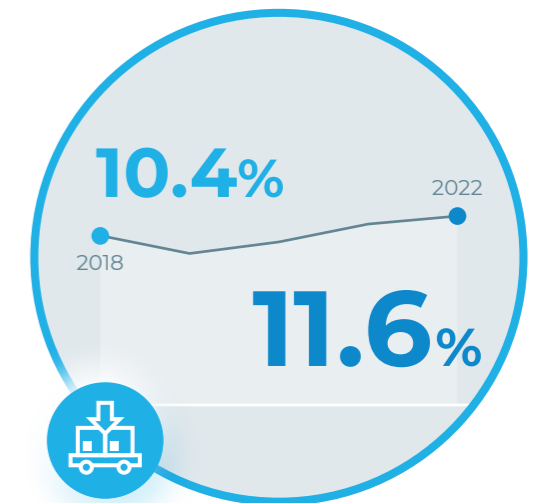
### Average monthly wage in agro-industrial complex, thou. tenge



### Share of agro-industrial complex in exports



### Share of agro-industrial complex in imports



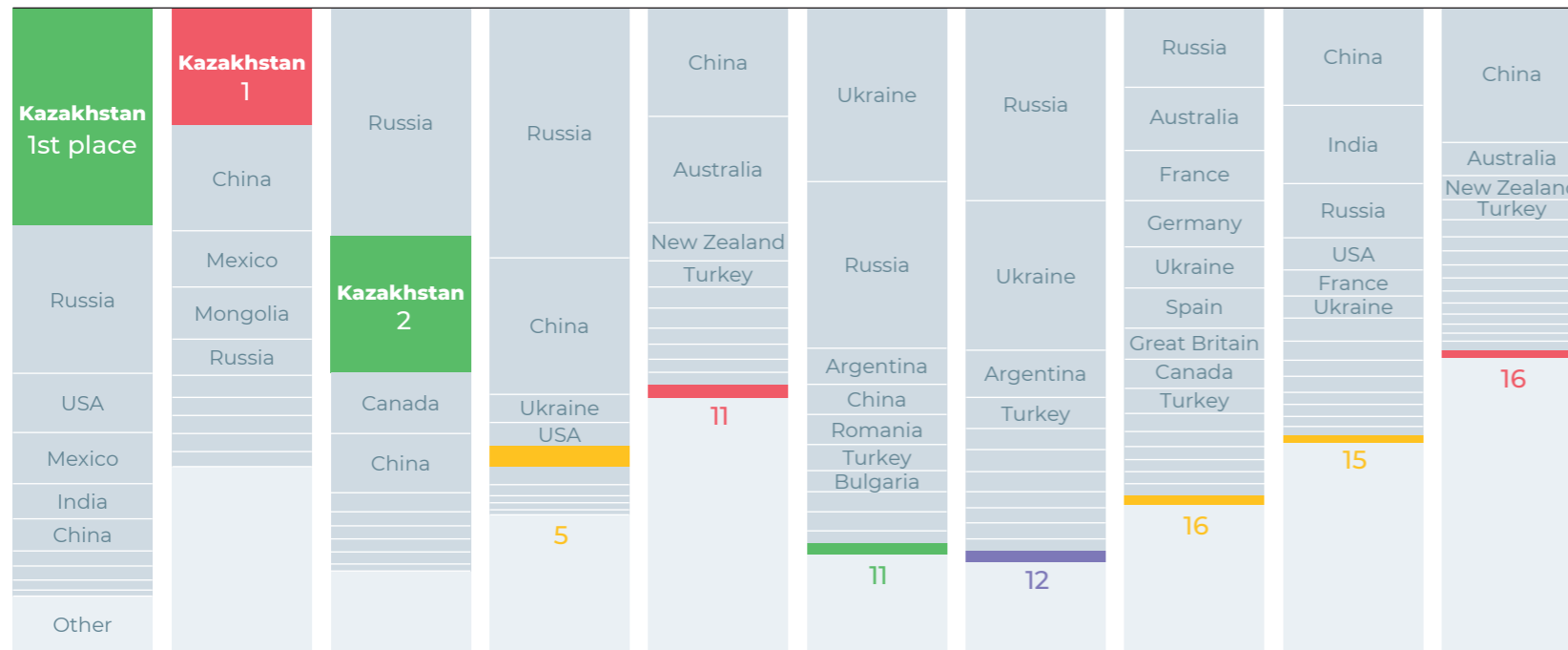


# KAZAKHSTAN'S PLACE ON THE WORLD MAP

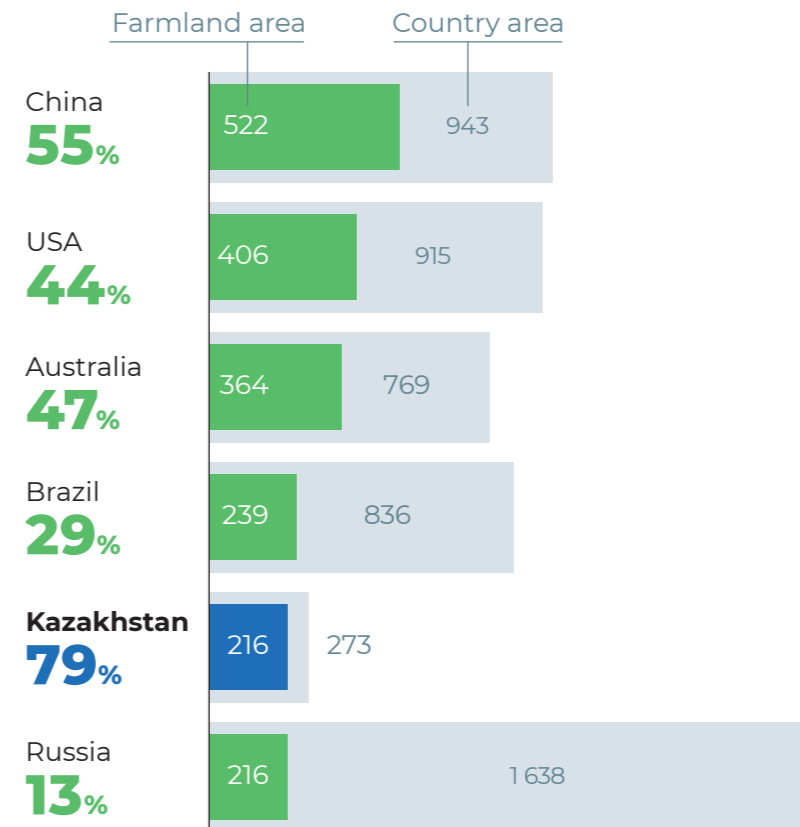
# AGRIBUSINESS OF KAZAKHSTAN

## Kazakhstan's position in global production, 2021/22 MY

**34%** Safflower   
 **18%** Horse meat   
 **21%** Flaxseed   
 **3.3%** Buckwheat   
 **1.9%** Wool   
 **1.7%** Sunflower   
 **1.7%** Sunflower oil   
 **1.6%** Barley   
 **1.3%** Wheat   
 **1.2%** Sheep meat



## Largest countries by agricultural land area, mln ha

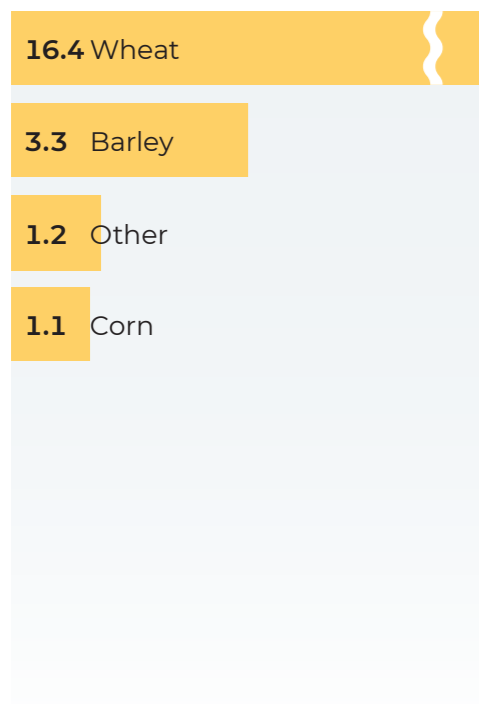


## Percentage of world totals

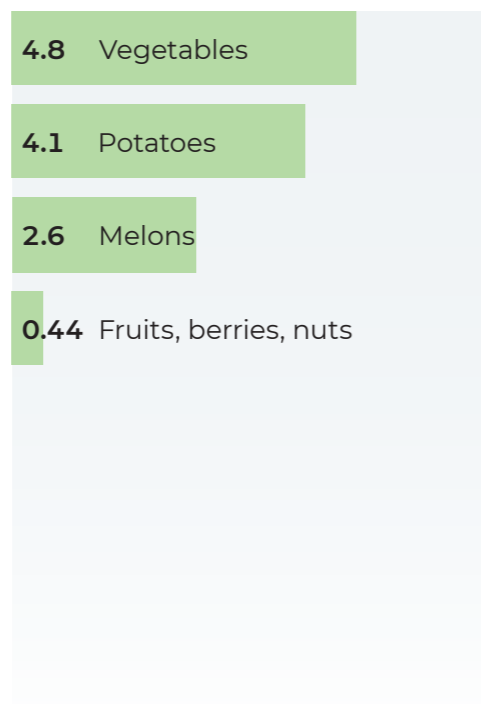




## Grains and legumes



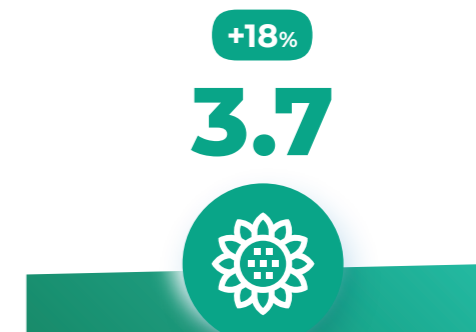
## Vegetables and fruits



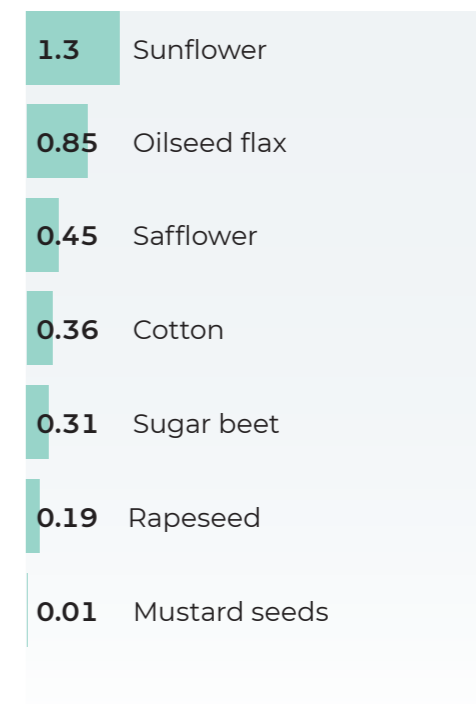
## Livestock products



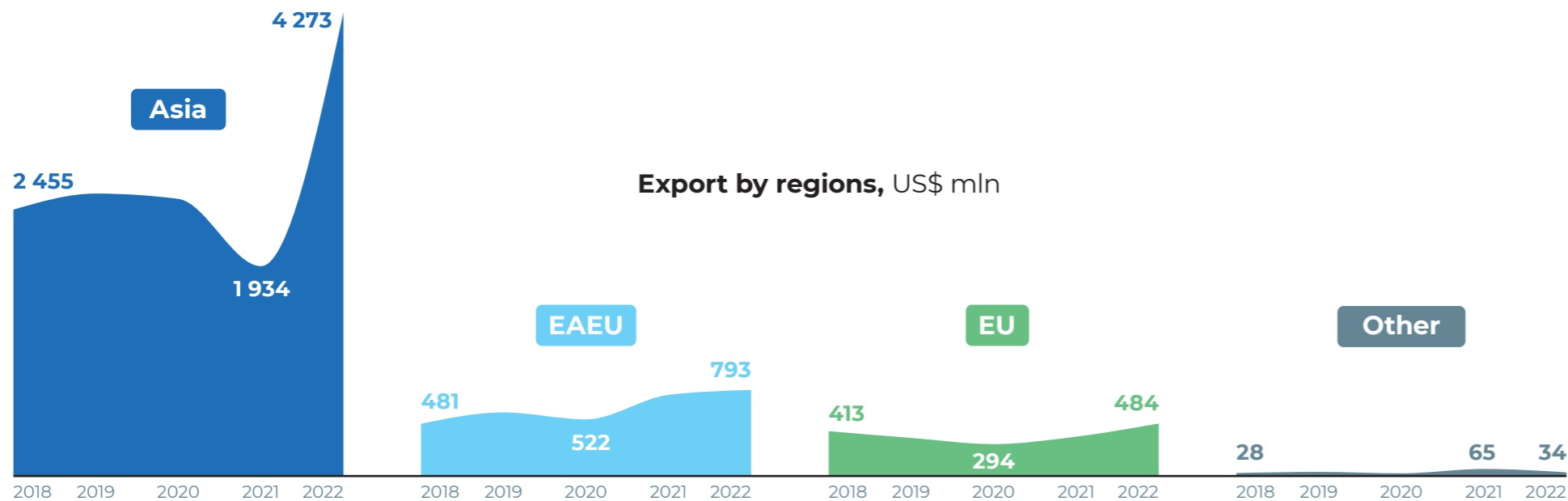
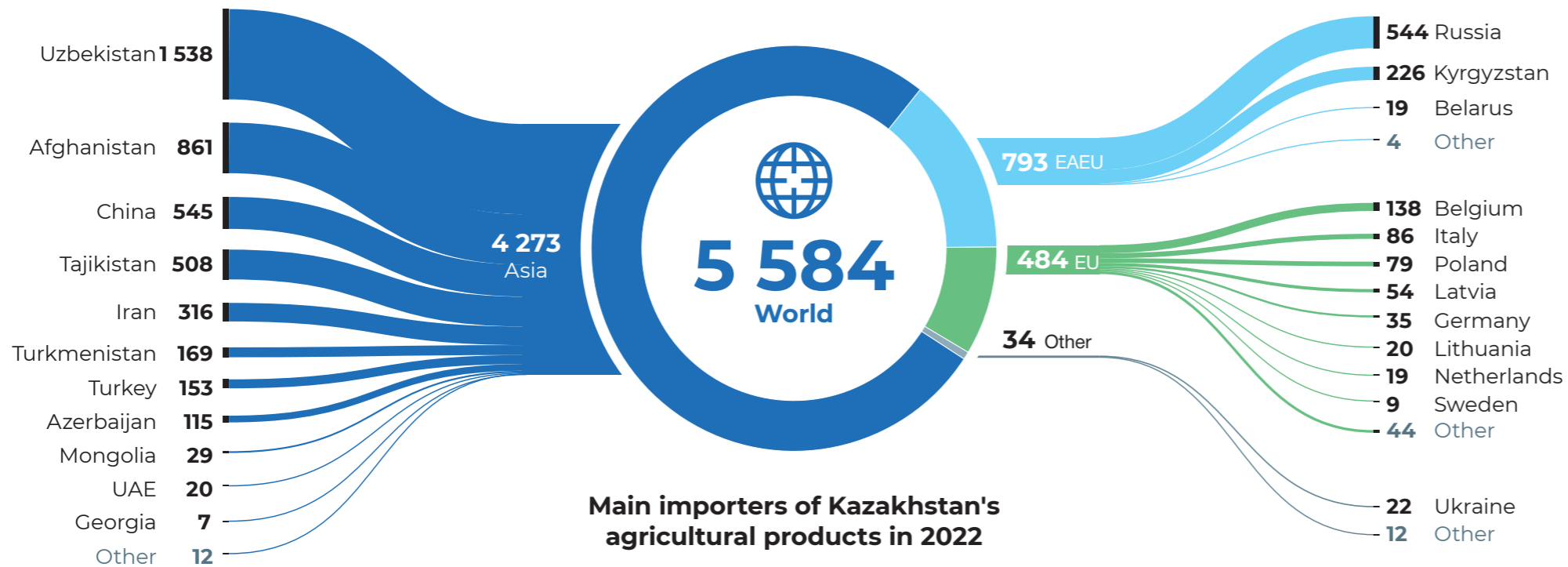
## Processed products



## Industrial crops







The upward trend in world prices for agricultural commodities and food, as well as the growth of domestic crop yields in 2022, contributed to an 80% increase in Kazakhstan's agricultural exports.

Last season, supplies of grains and oilseeds increased, both in value and physical terms.

Exports of flour, meat, meat by-products, vegetable oils, and fats also increased.

In 2022, Asian countries remained the leaders among the main sales markets for Kazakhstan's agricultural products.

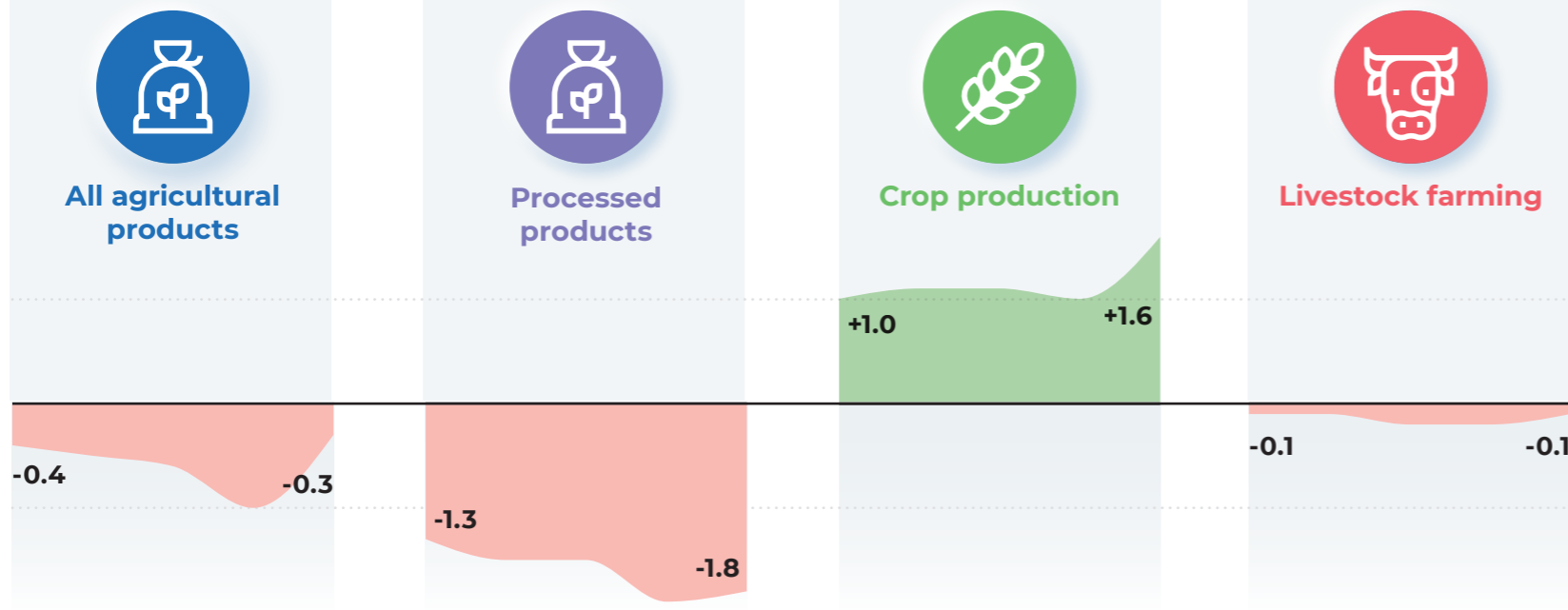
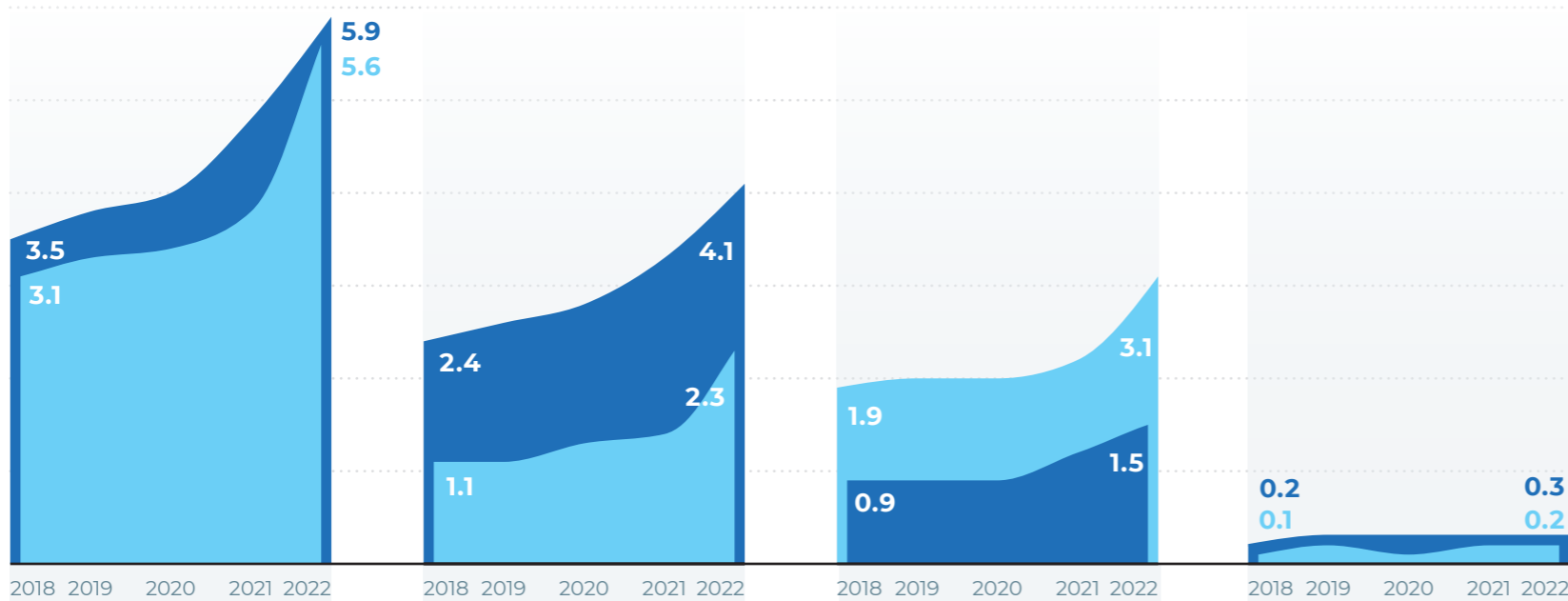
Significant changes include the return of Afghanistan to the Top 5 countries importing Kazakh agricultural goods and a significant increase in supplies to Uzbekistan, Iran and Turkmenistan.



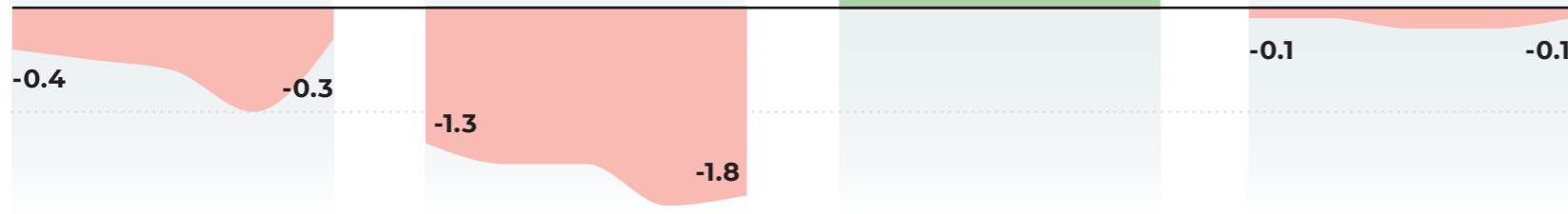
## GEOGRAPHY OF AGRO-INDUSTRIAL EXPORTS, \$ MLN

## AGRIBUSINESS OF KAZAKHSTAN

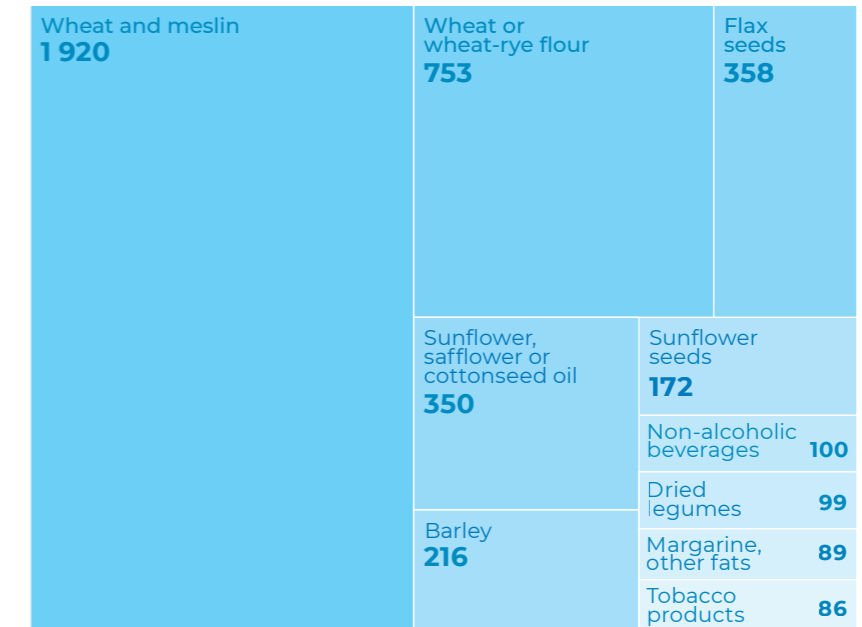
Export and import of agricultural products, US\$ bln



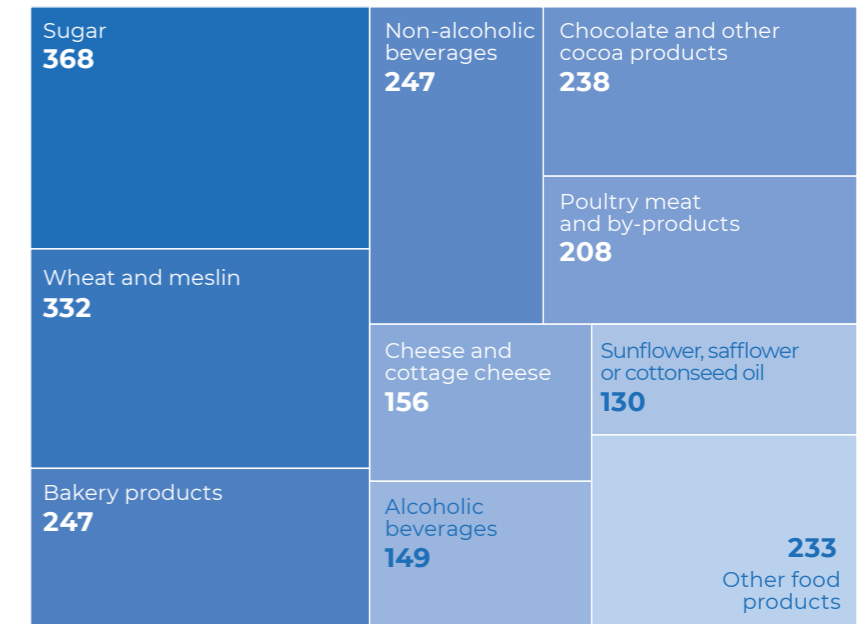
Export and import balances, US\$ bln



TOP 10 export products in 2022, US\$ mln



TOP 10 import products in 2022, US\$ mln



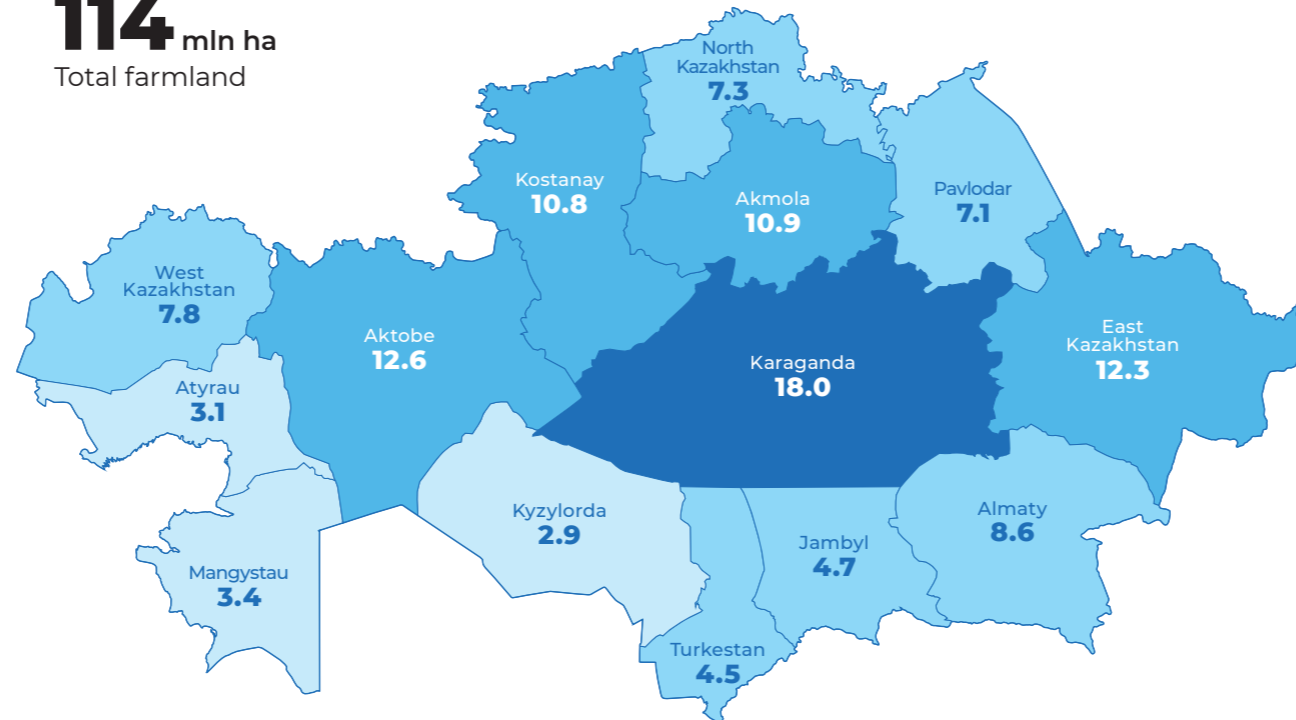


## TOP 20 agricultural holdings by landbank area as of 01.08.2023, thou. ha

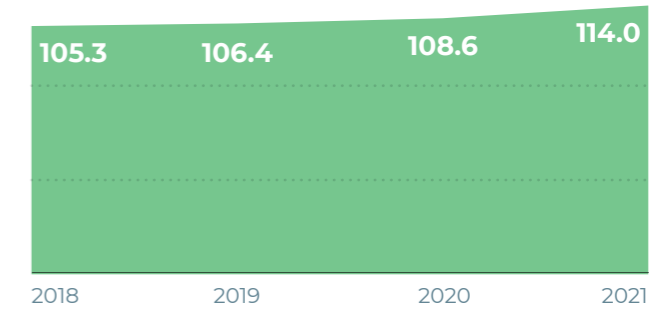
Olzha Agro	960
Atameken Agro	441
Agrofirm TNK	430
Karasu-Astykh	200
Zhuravlevka-1	172
Altyn Biday 2000	160
Aray Holding	157
Plemzavod Kalbatau	148
Agrofirm Dievskaya	126
Altynsarino	120
Asyl Logistics	120
Sochinskoye	116
Kusto Agro	113
Grain Industry	107
Shalabay	98
Askop Company	94
Bastau	64
Astana Grand Trade	62
En-Dala	60
Sodruzhestvo	60

## Agricultural land by regions as of 1 November 2021, mln ha

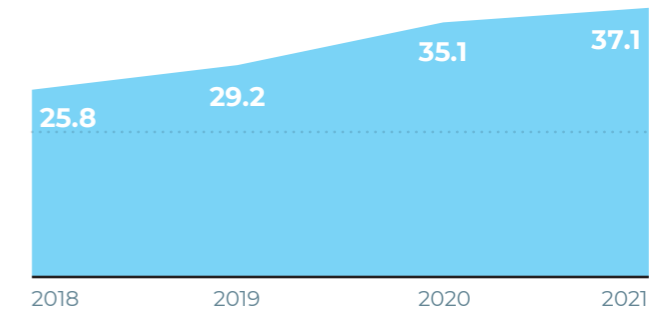
**114** mln ha  
Total farmland



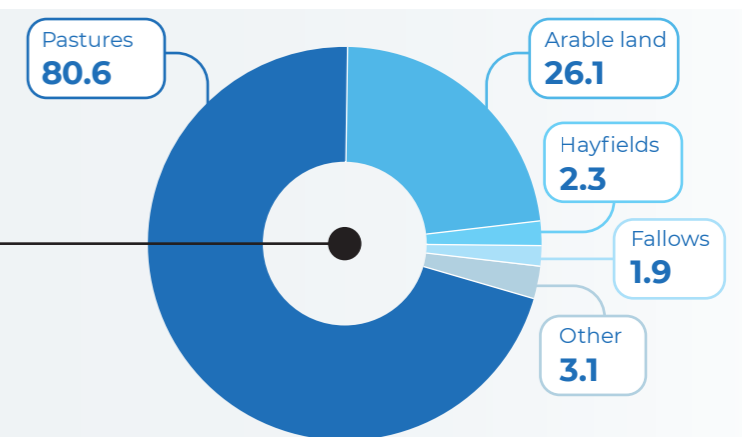
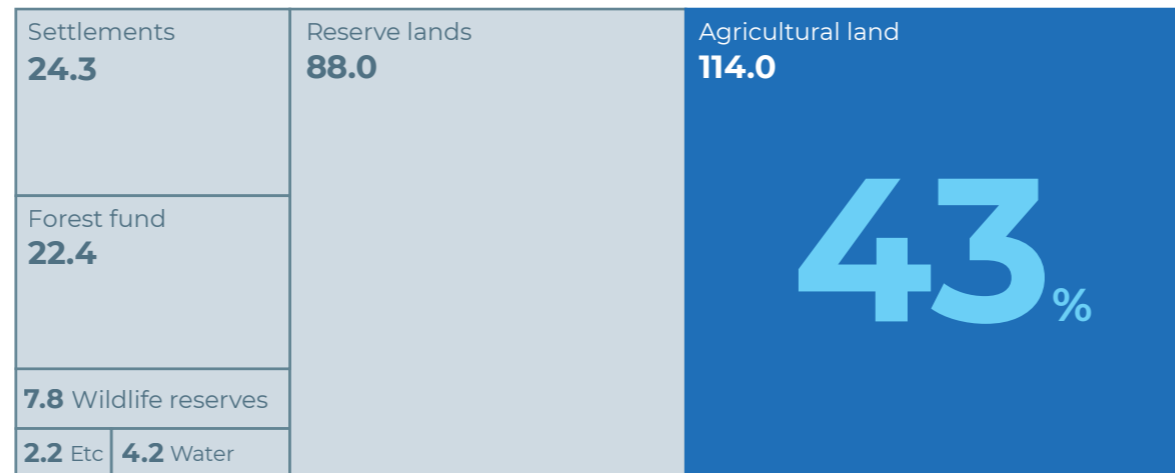
## Farmland area, mln ha



## Farmland productivity, thou. tenge per ha



## Land fund, mln ha



# CROP PRODUCTION



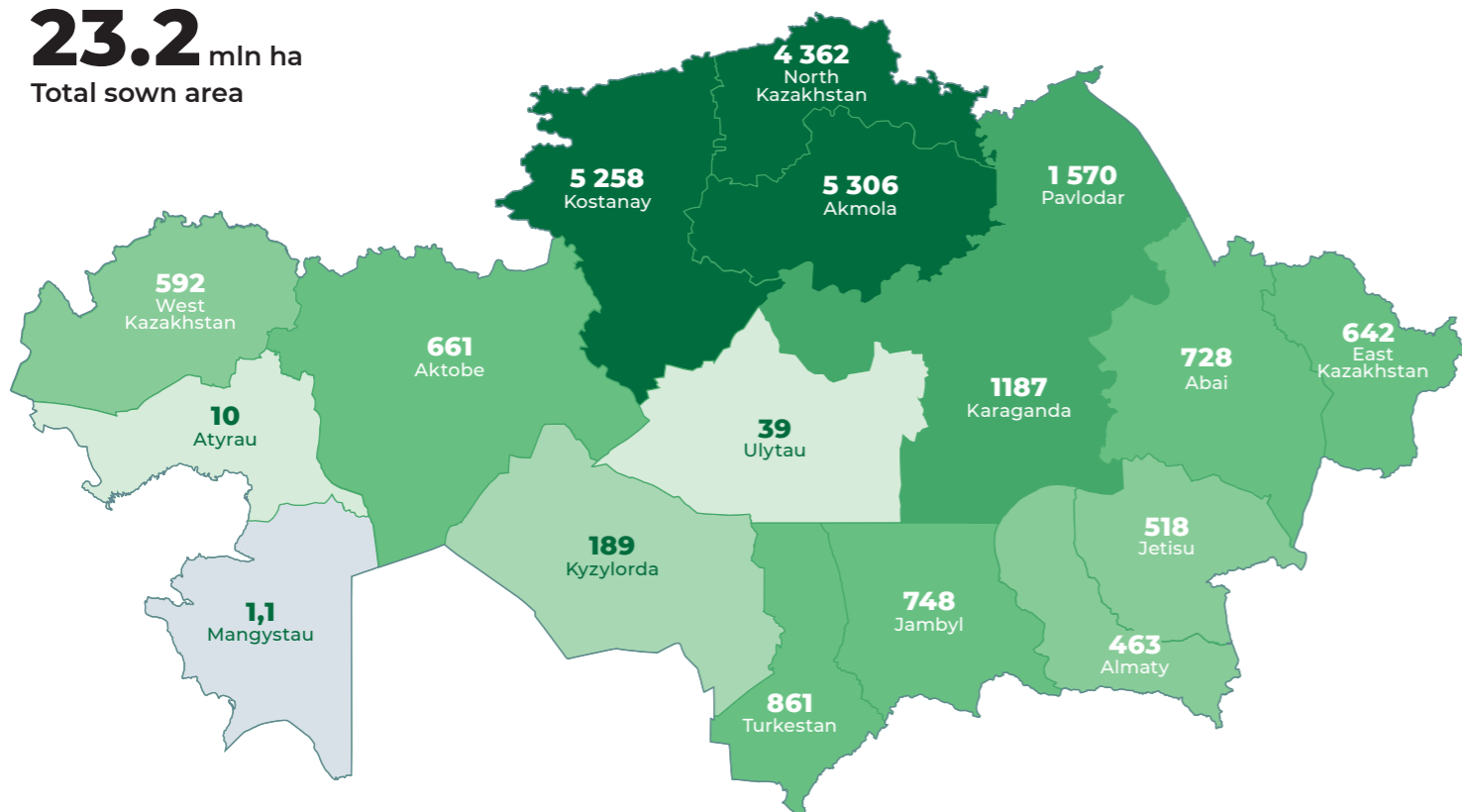


# SOWN AREAS OF KAZAKHSTAN

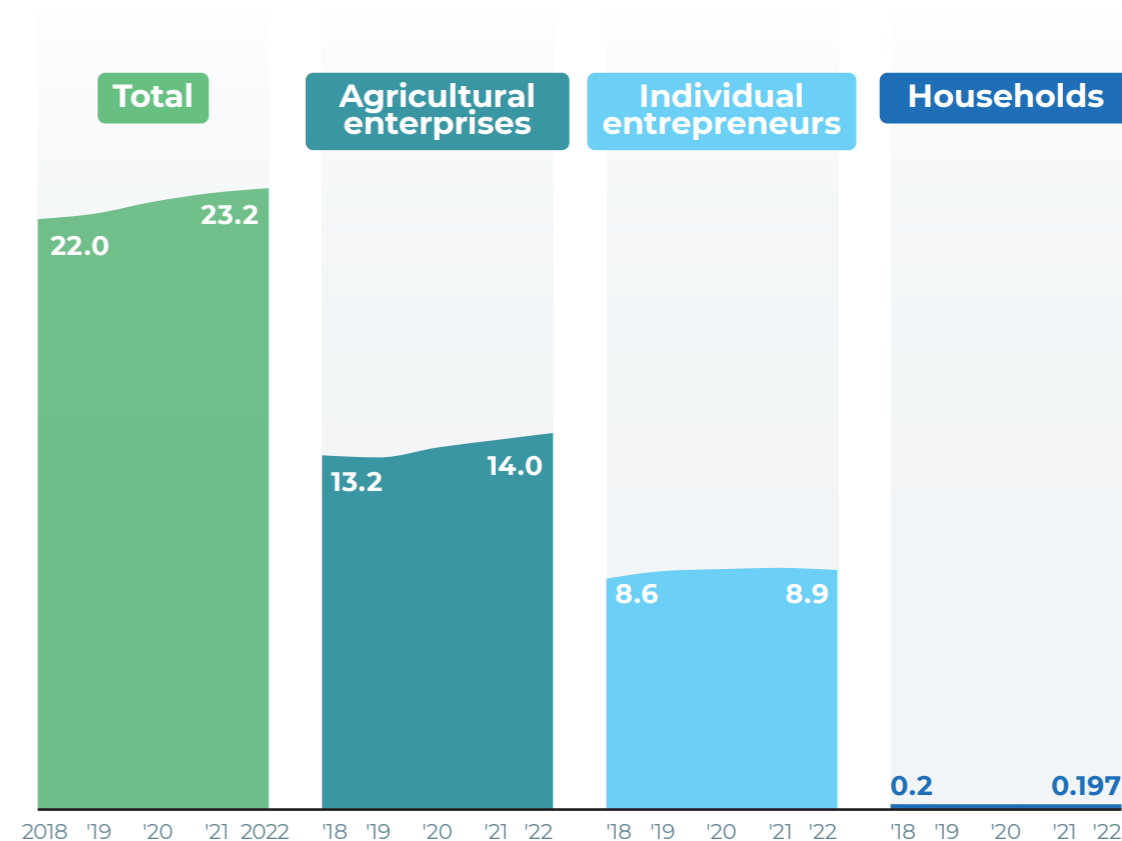
# CROP PRODUCTION

Total updated sown area in 2022, thou. ha

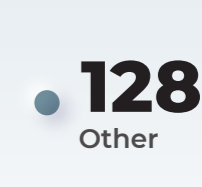
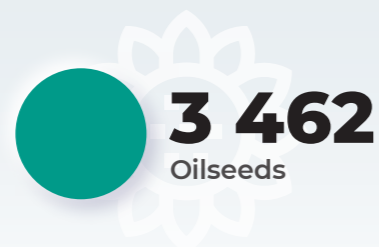
**23.2** mln ha  
Total sown area



Sown area dynamics, mln ha



Sown area of main crops in 2022, thou. ha



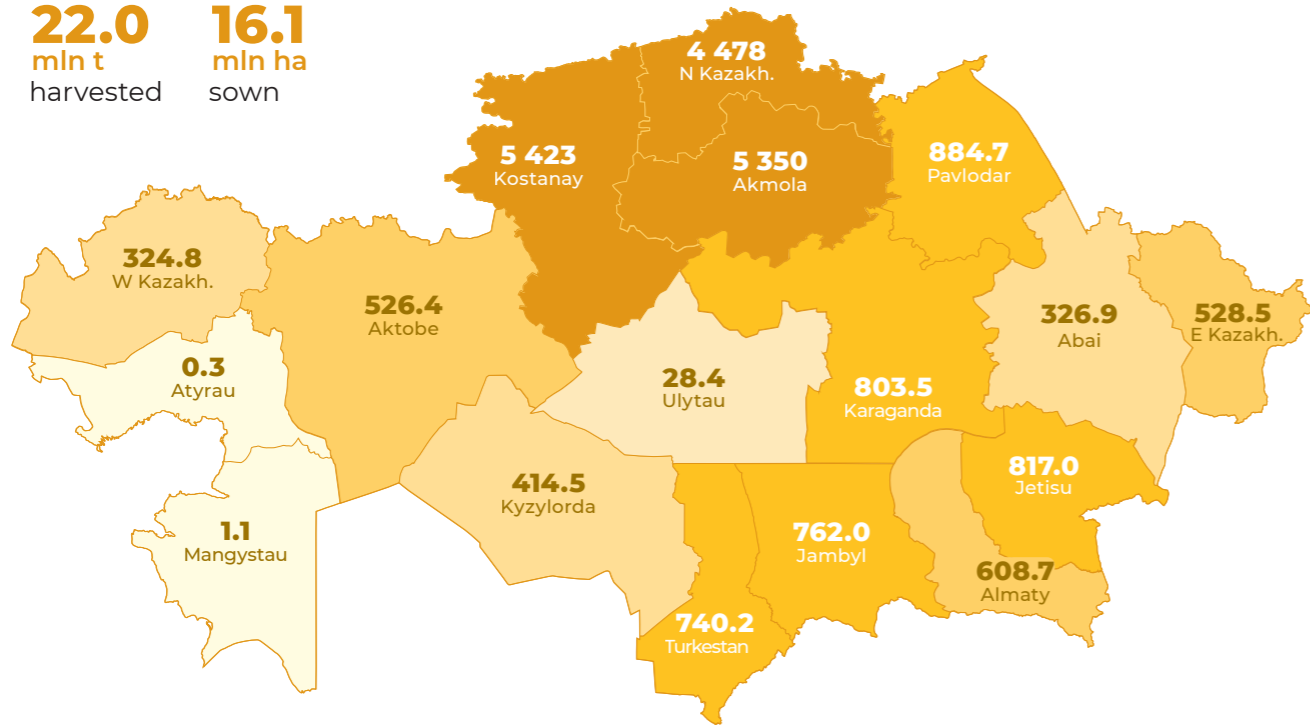


# MAIN CROPS PRODUCTION

# CROP PRODUCTION

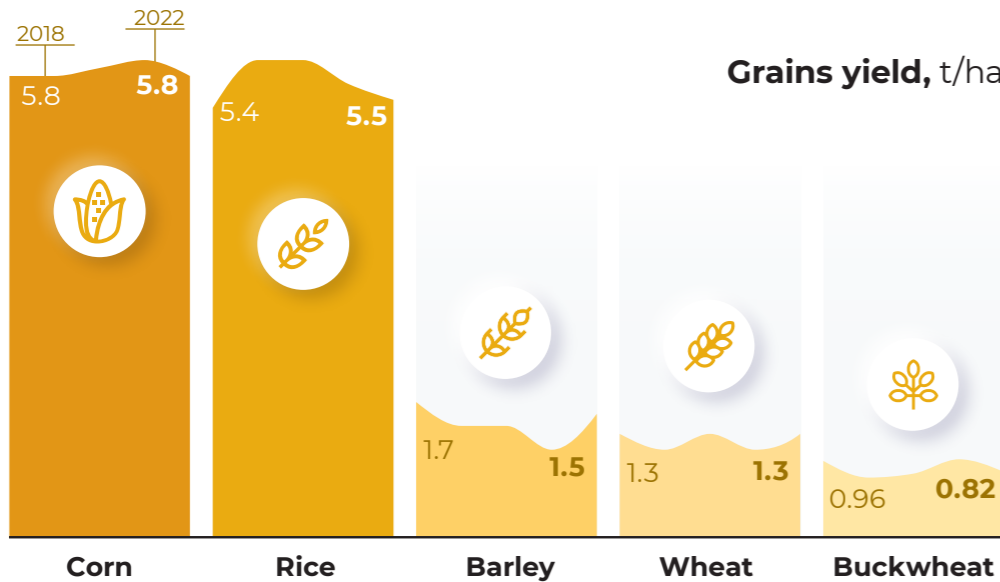
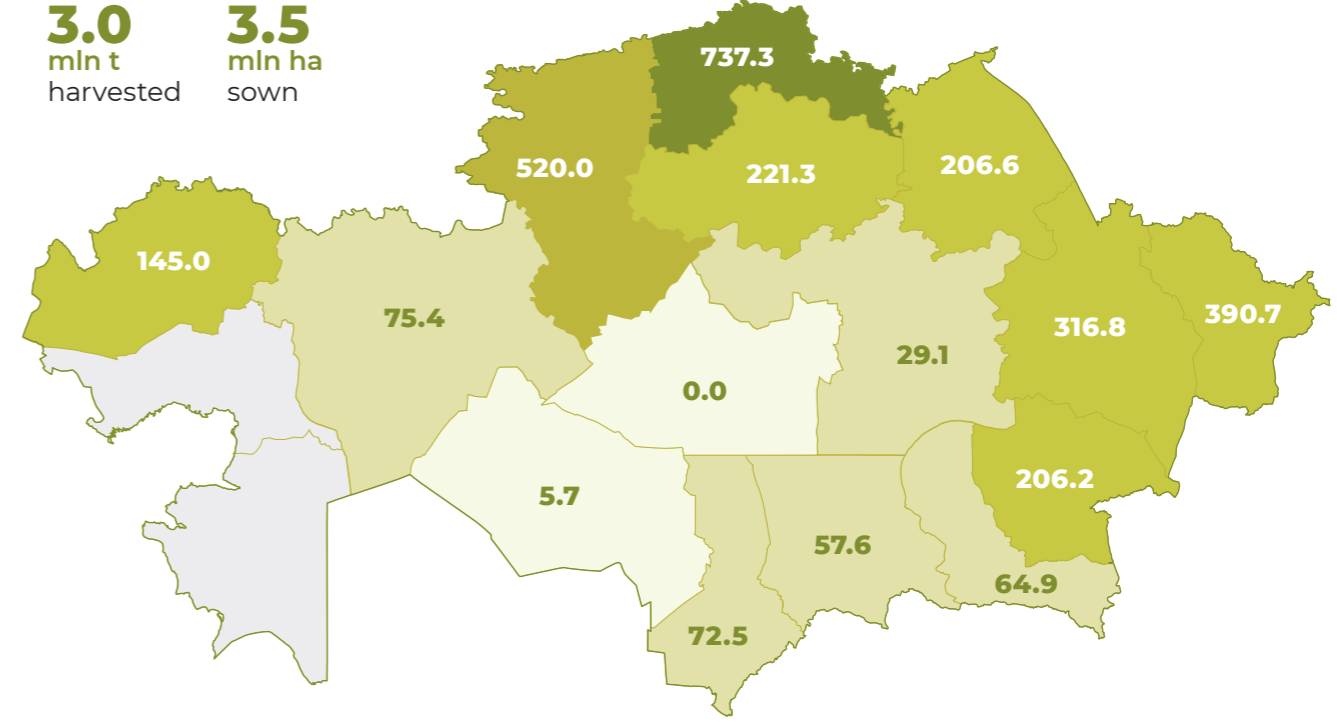
## Grain crops production in 2022, thou. t

**22.0** mln t harvested  
**16.1** mln ha sown



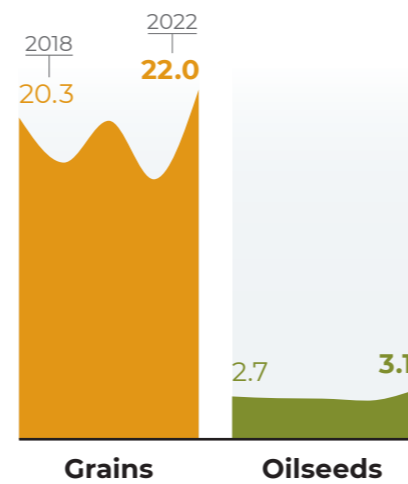
## Oilseed crops production in 2022, thou. t

**3.0** mln t harvested  
**3.5** mln ha sown

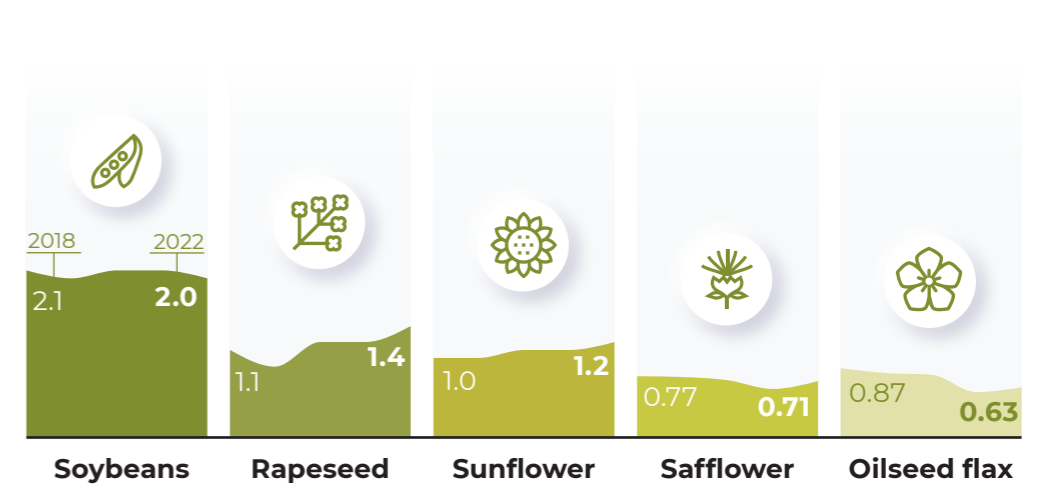


Grains yield, t/ha

Production, mln t



Oilseed yields, t/ha





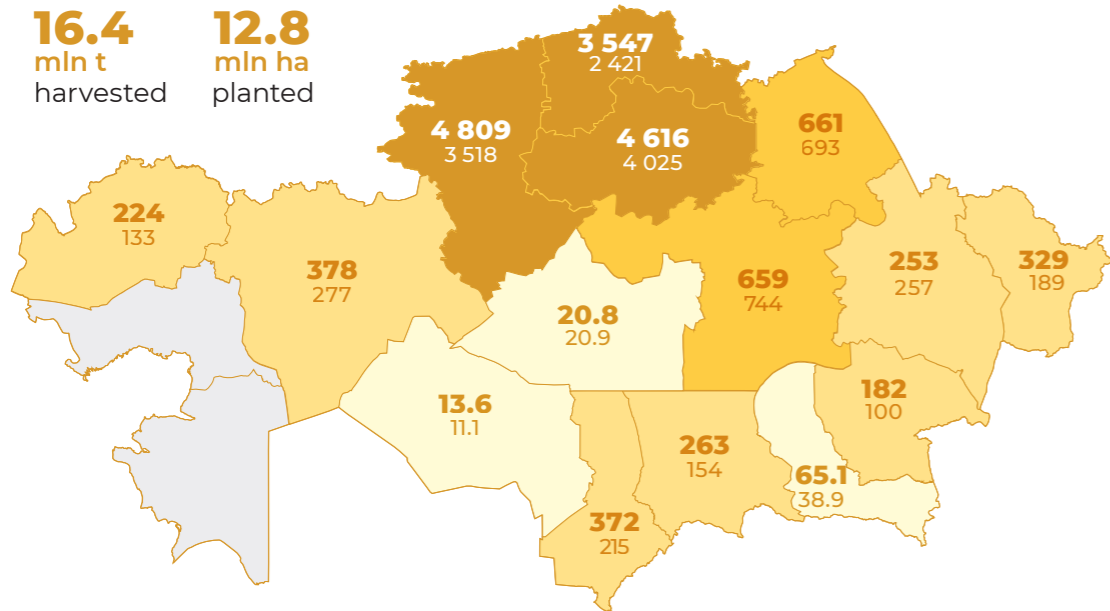
# GRAIN CROPS PRODUCTION: WHEAT

# CROP PRODUCTION

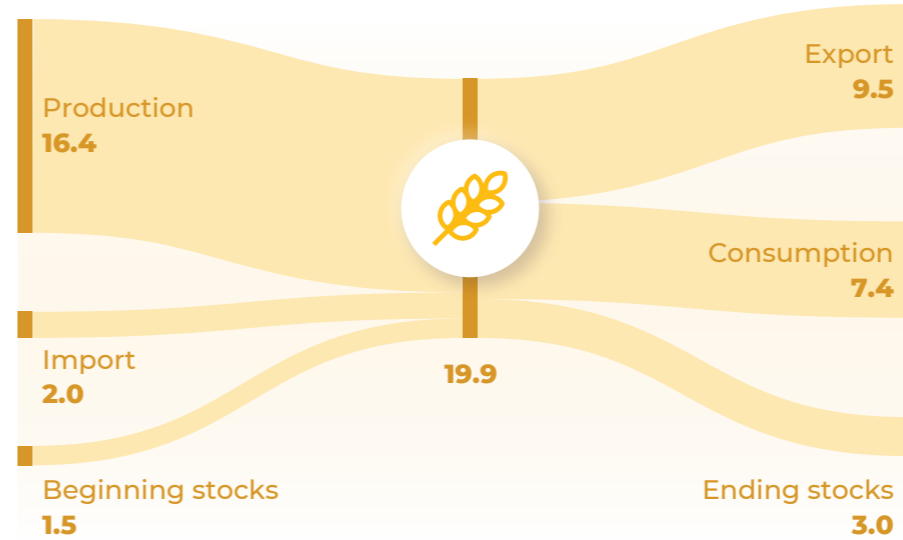
## Production and harvested area in 2022

661 — production, thou. t  
693 — harvested area, thou. ha

**16.4** mln t harvested  
**12.8** mln ha planted



## Wheat production and consumption balance in MY 2022/23, mln t



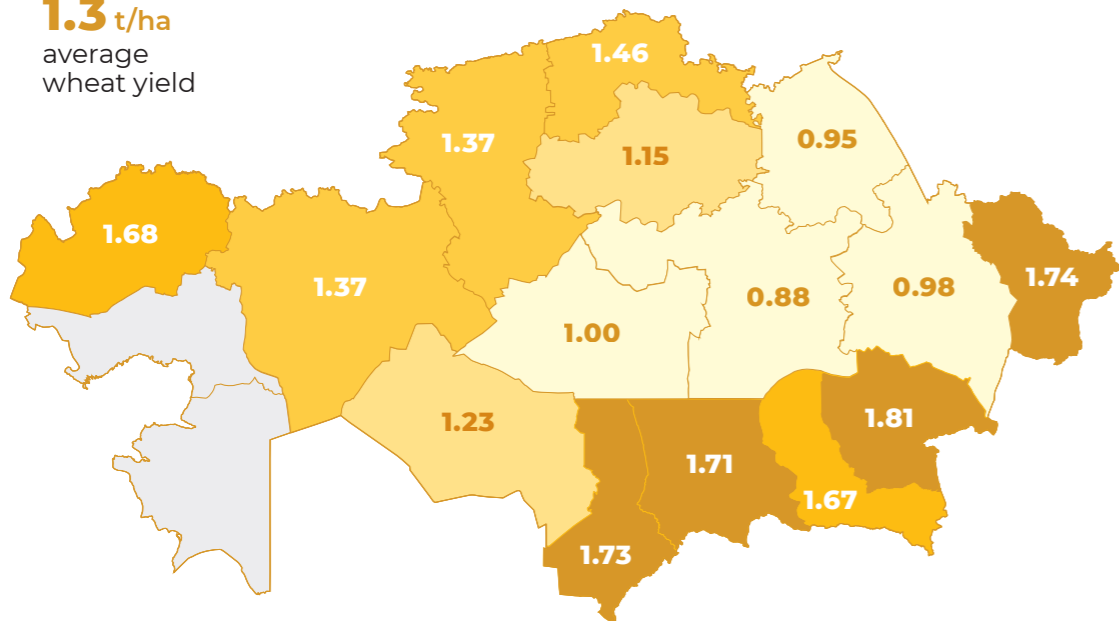
Wheat production in Kazakhstan in 2022 reached a record high for the last decade.

The gross yield increased by 39% compared to 2021. The yield was 1.3 t/ha, compared to 1.1 t/ha in the previous season.

Domestic consumption accounted for 45% of the gross harvest. Despite high production, imports remained at their peak at 2.0 mln t.

## Yield in 2022, t/ha

**1.3** t/ha average wheat yield



## Exports and imports, US\$ mln



## Top 5 export destinations

Uzbekistan	824.8
Tajikistan	309.9
Afghanistan	194.3
Iran	190.7
Turkmenistan	123.0



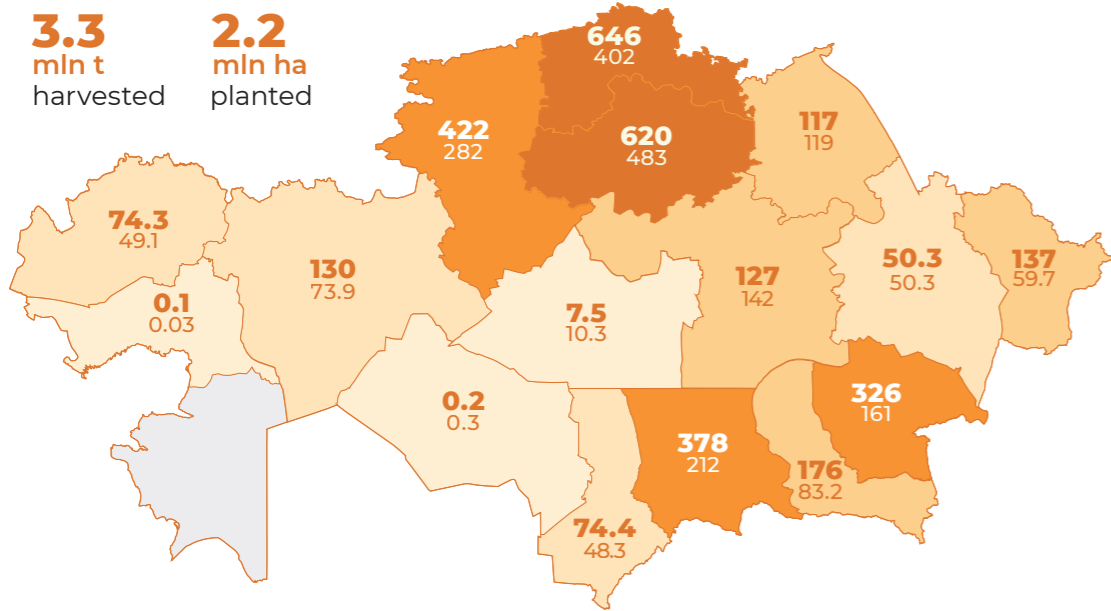
# GRAIN CROPS PRODUCTION: BARLEY

# CROP PRODUCTION

## Production and harvested area in 2022

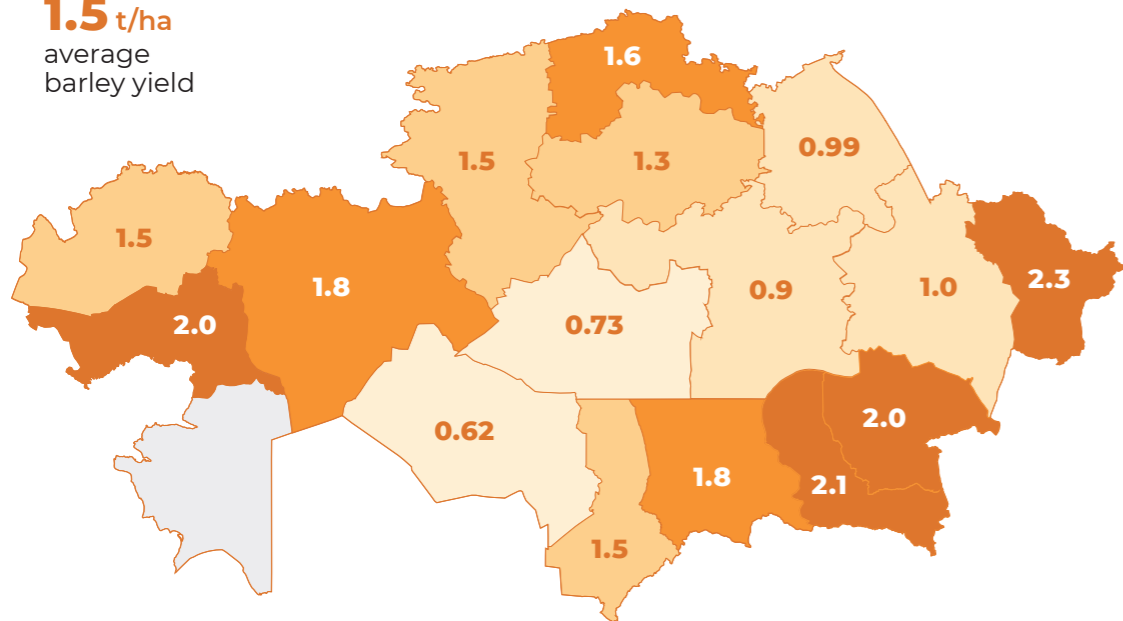
**3.3** mln t harvested  
**2.2** mln ha planted

**646** — production, thou. t  
**402** — harvested area, thou. ha

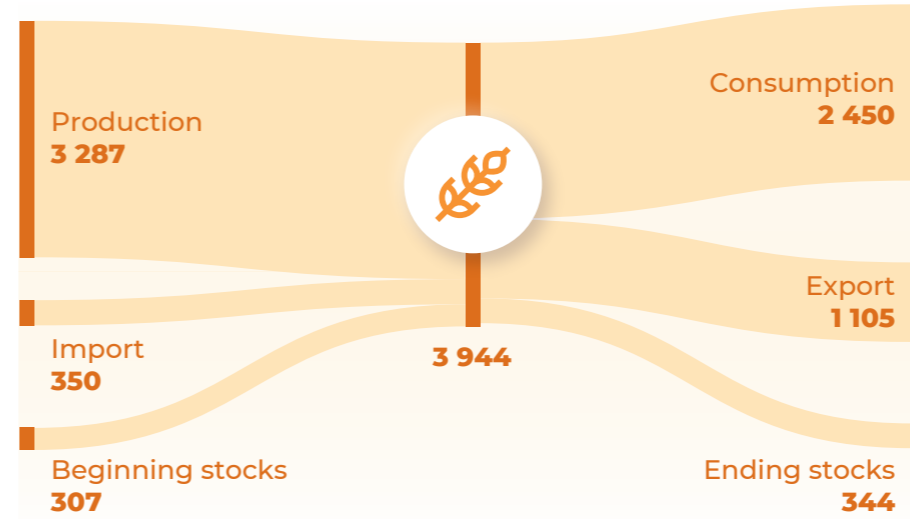


## Yield in 2022, t/ha

**1.5** t/ha average barley yield



## Barley production and consumption balance in MY 2022/23, thou. t

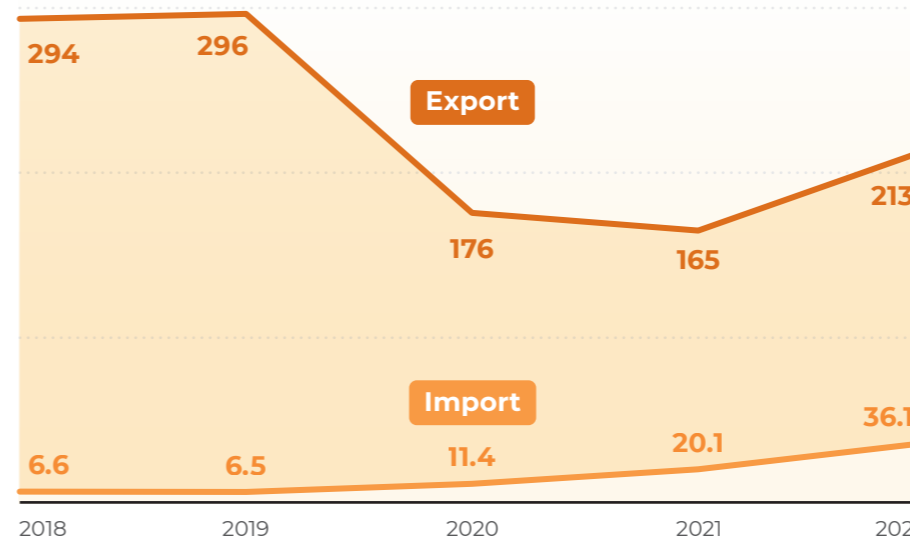


The gross barley harvest in Kazakhstan reached 3.3 mln t in 2022, which is 1 mln t higher than in 2021, but below the five-year average.

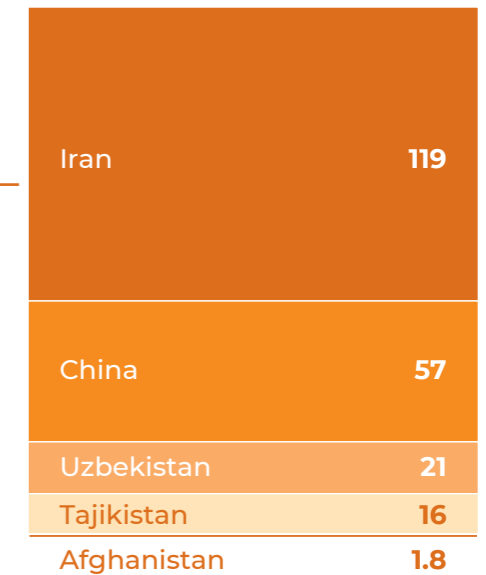
At the same time, yields increased from 1.1 t/ha in 2021 to 1.5 t/ha.

Domestic consumption accounted for 75% of the gross harvest.

## Exports and imports, US\$ mln



## Top 5 export destinations



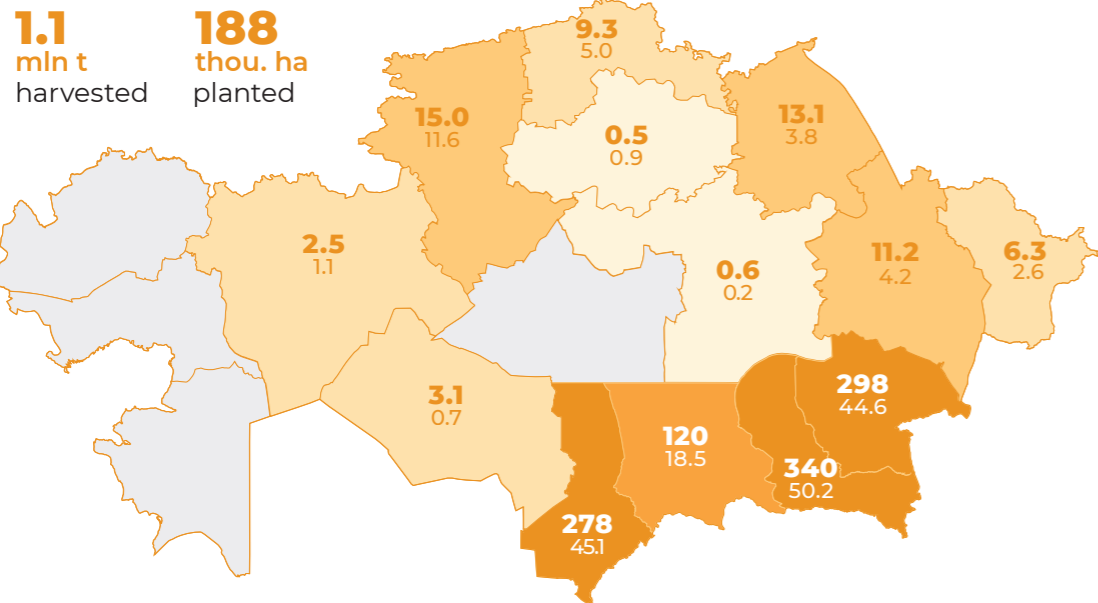




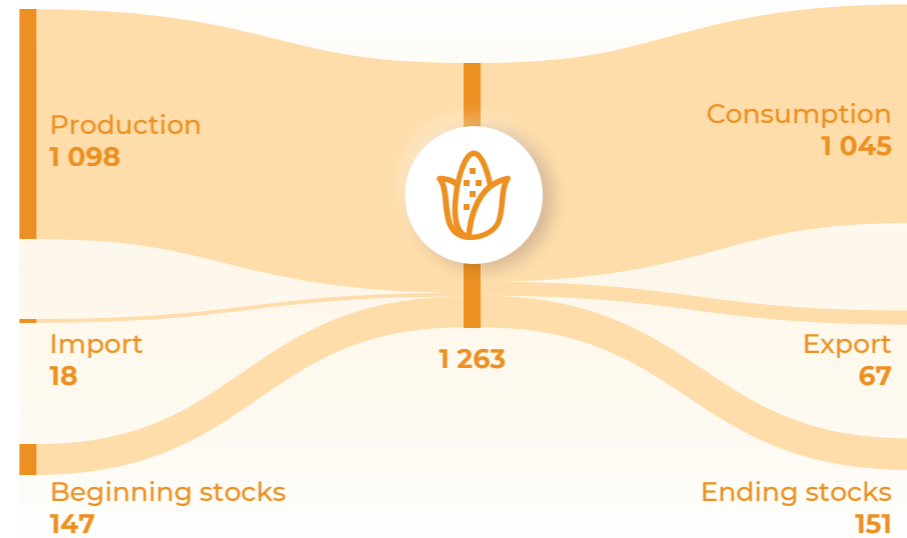
# GRAIN CROPS PRODUCTION: CORN FOR GRAIN

# CROP PRODUCTION

## Production and harvested area in 2022



## Corn production and consumption balance in MY 2022/23, thou. t

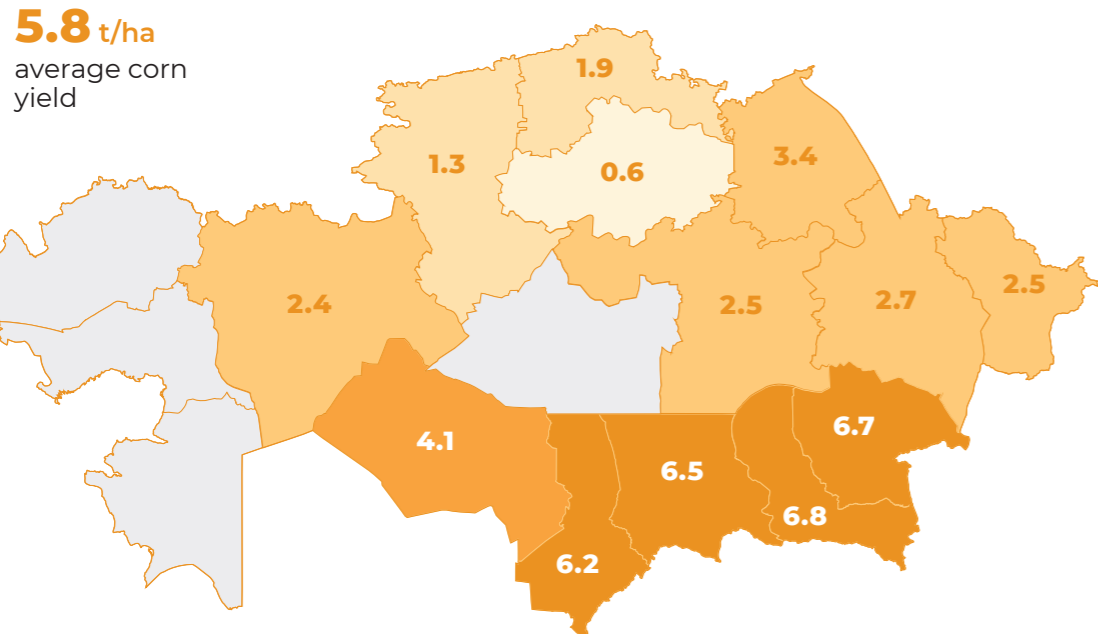


In 2022, corn production remained at ten-year highs, only slightly behind 2021.

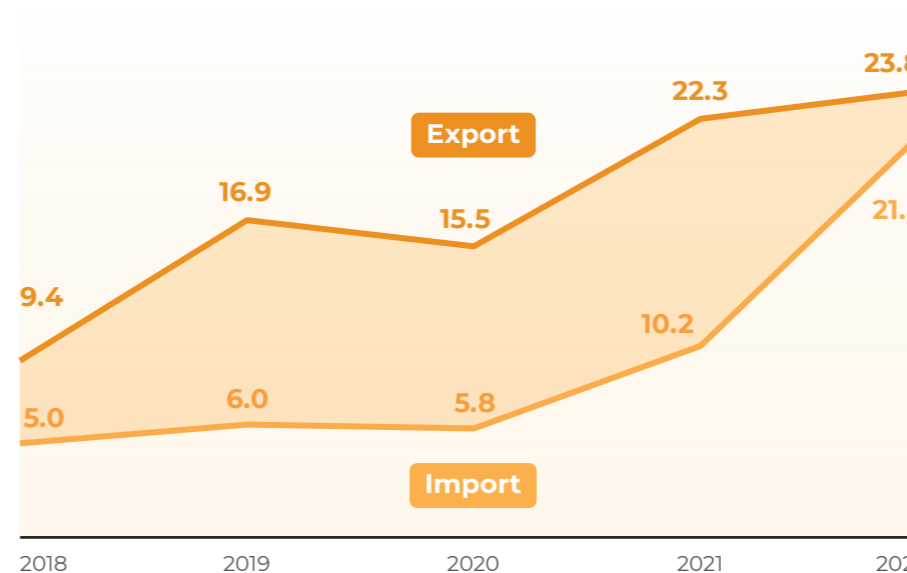
Yields were 5.8 t/ha, compared to 6.0 t/ha in the previous season.

Domestic consumption was covered by the gross harvest, and exports/imports were minimal.

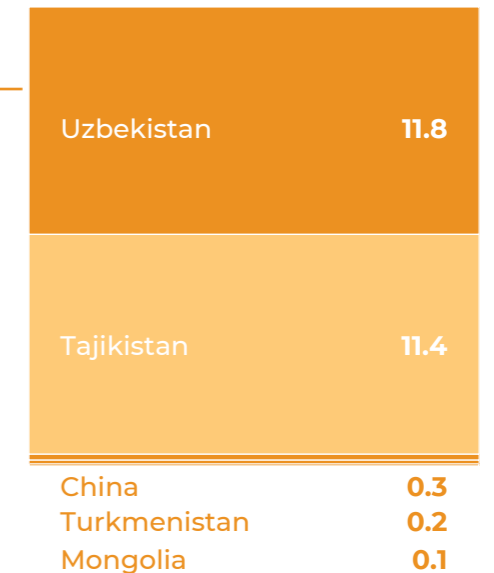
## Yield in 2022, t/ha



## Exports and imports, US\$ mln



## Top 5 export destinations





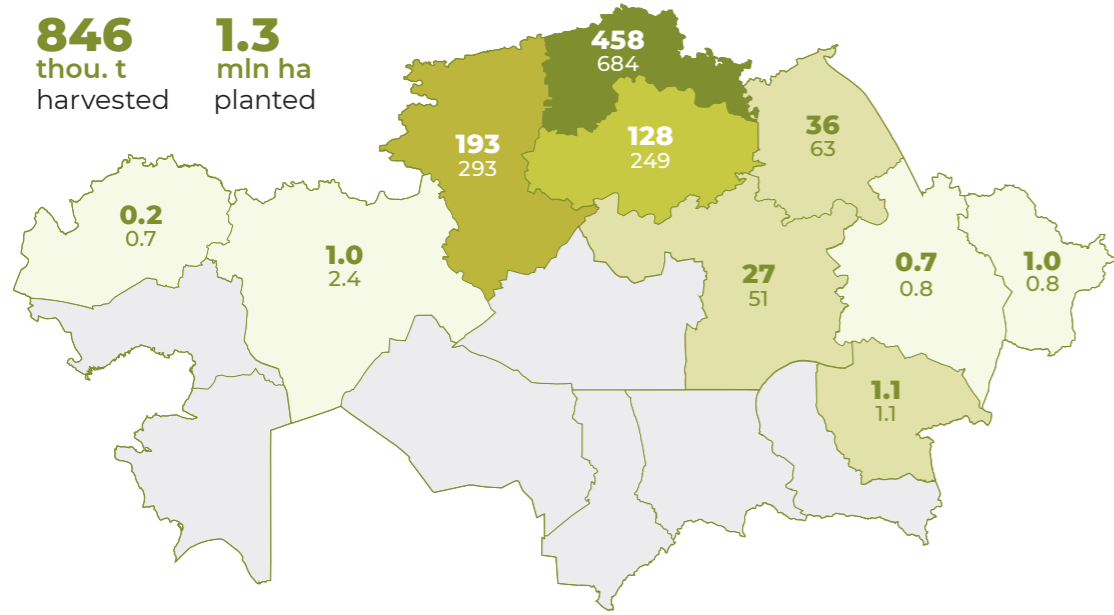
# OILSEED CROPS PRODUCTION: FLAXSEED

# CROP PRODUCTION

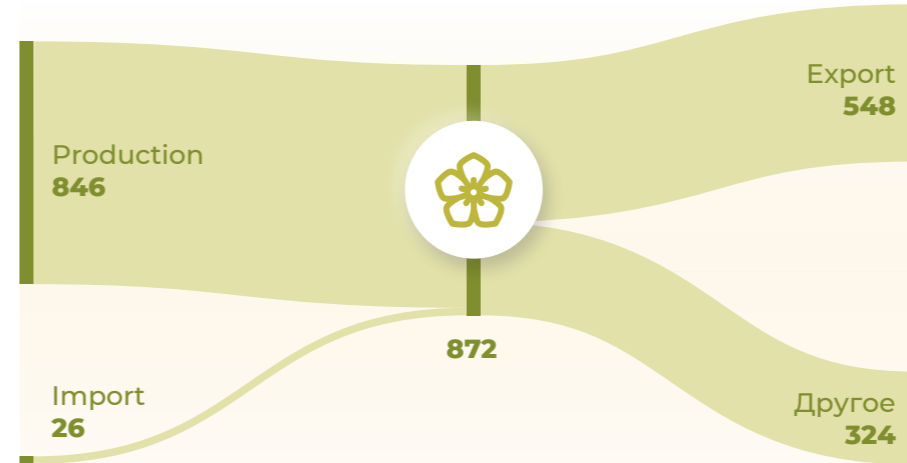
## Production and harvested area in 2022

458 — production, thou. t  
684 — harvested area, thou. ha

846 thou. t harvested  
1.3 mln ha planted



## Flaxseed production and consumption balance in 2022/23 MY, thou. t



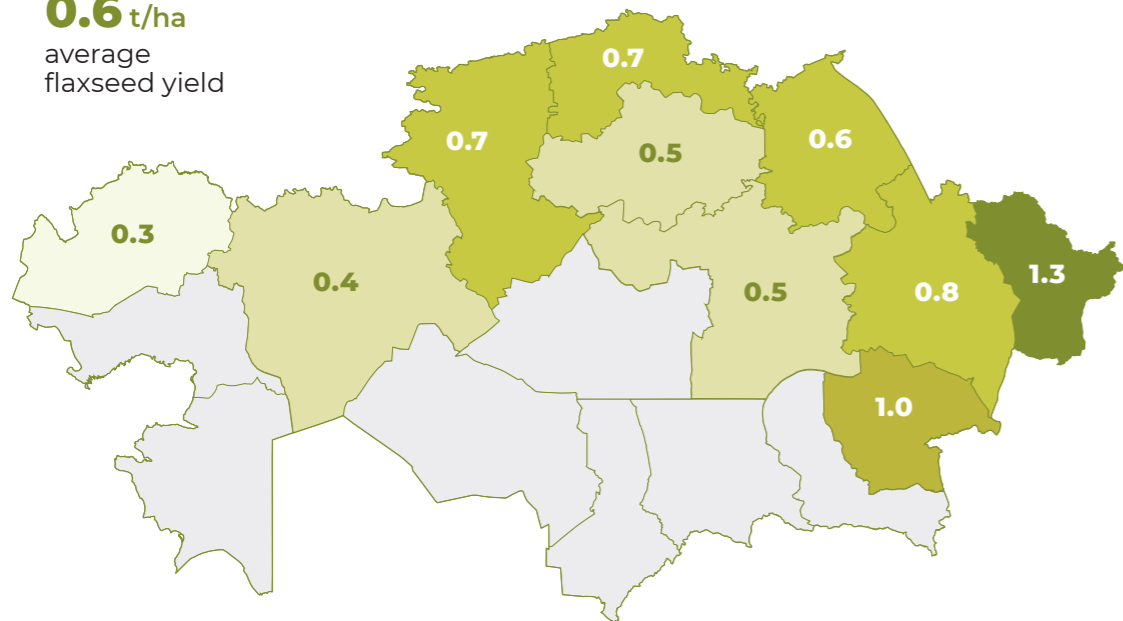
Despite an increase in flax production in 2022, the gross harvest remained below the five-year average.

At the same time, yields increased slightly.

Domestic consumption accounted for 35% of the gross harvest, while 65% was exported.

## Yield in 2022, t/ha

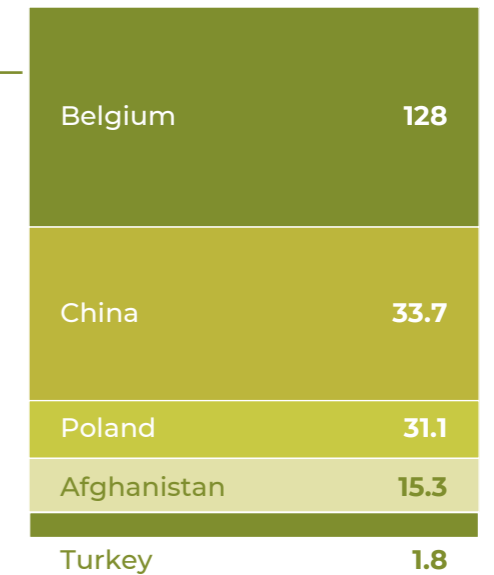
0.6 t/ha average flaxseed yield



## Exports and imports, US\$ mln



## Top 5 export destinations





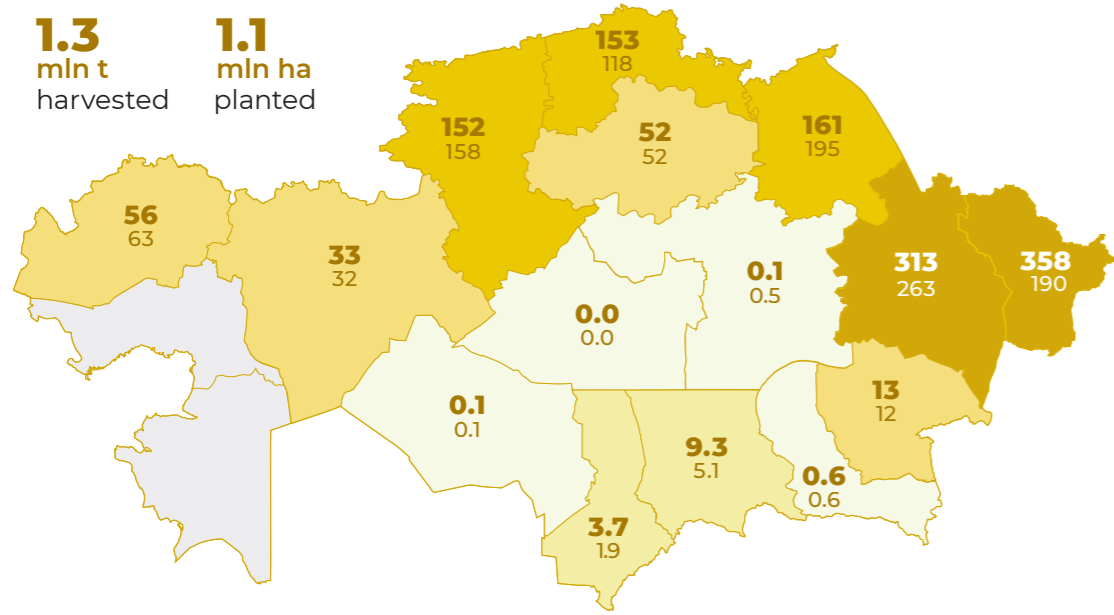
# OILSEED CROPS PRODUCTION: SUNFLOWERSEED

# CROP PRODUCTION

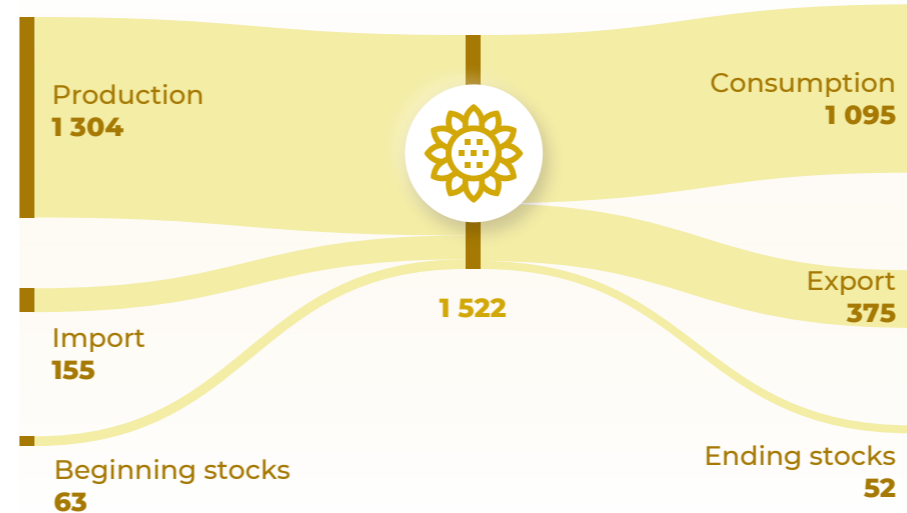
## Production and harvested area in 2022

153 — production, thou. t  
118 — harvested area, thou. ha

**1.3** mln t harvested  
**1.1** mln ha planted



## Sunflowerseed production and consumption balance in 2022/23 MY, thou. t



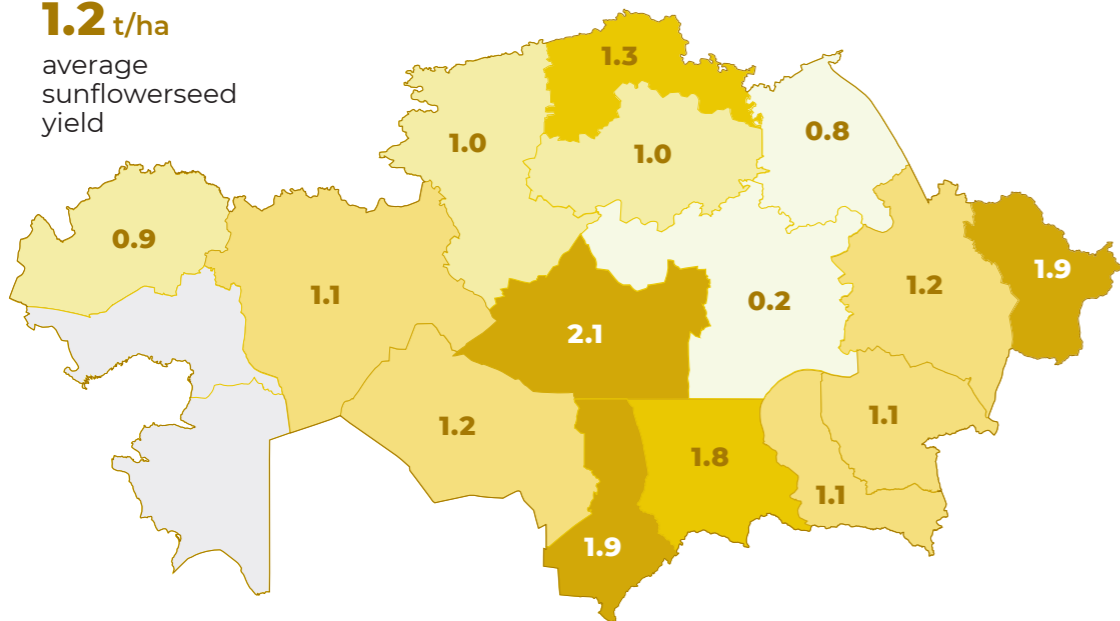
Gross sunflower seed harvest reached a record high in 2022.

Yields reached 1.2 t/ha against 1.1 t/ha in 2021.

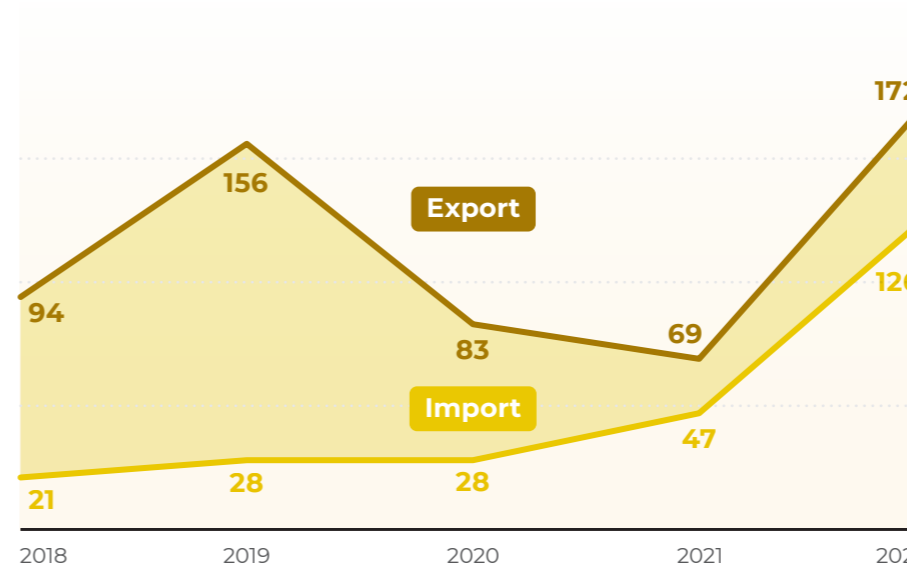
Domestic consumption reached 1.1 mln t. At the same time, exports and imports also showed growth.

## Yield in 2022, t/ha

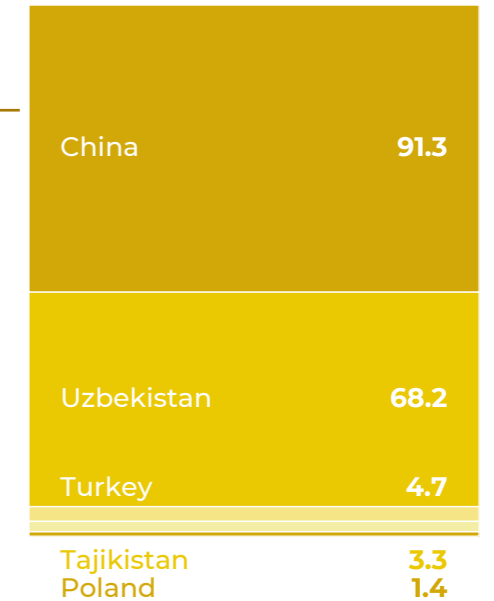
**1.2** t/ha average sunflowerseed yield



## Exports and imports, US\$ mln



## Top 5 export destinations



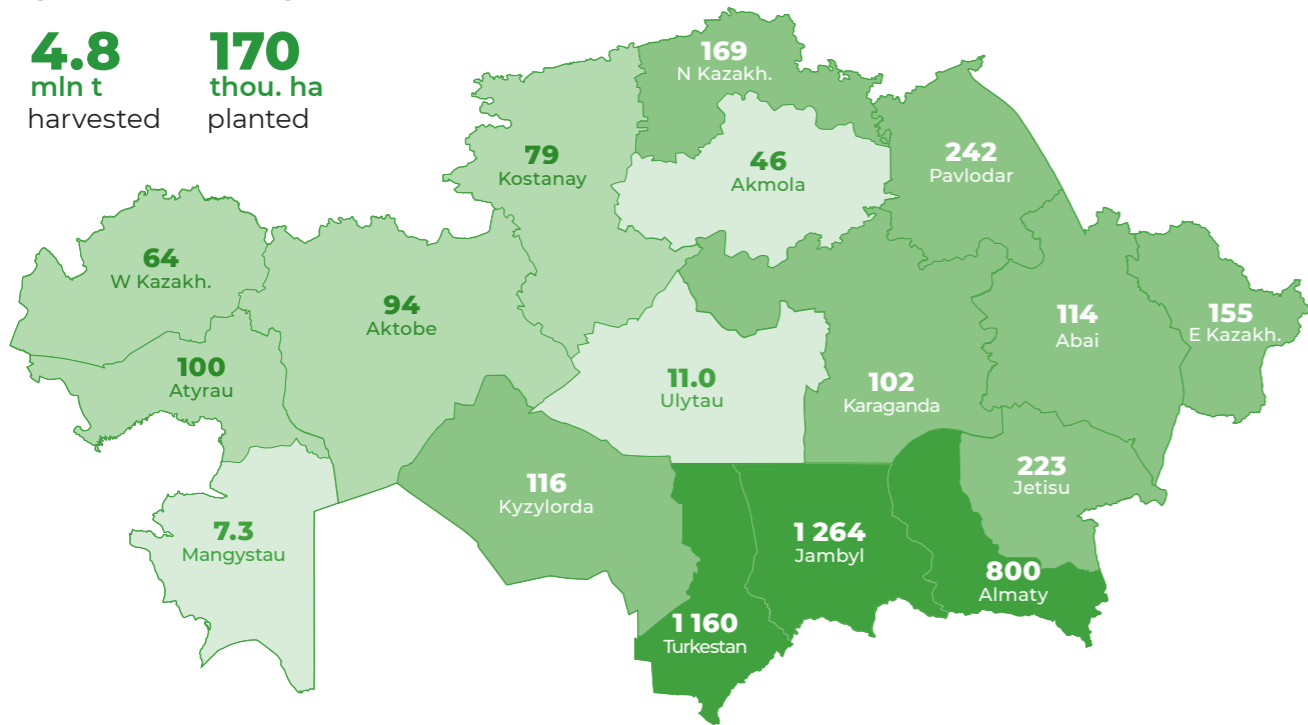


# VEGETABLES: PRODUCTION

# CROP PRODUCTION

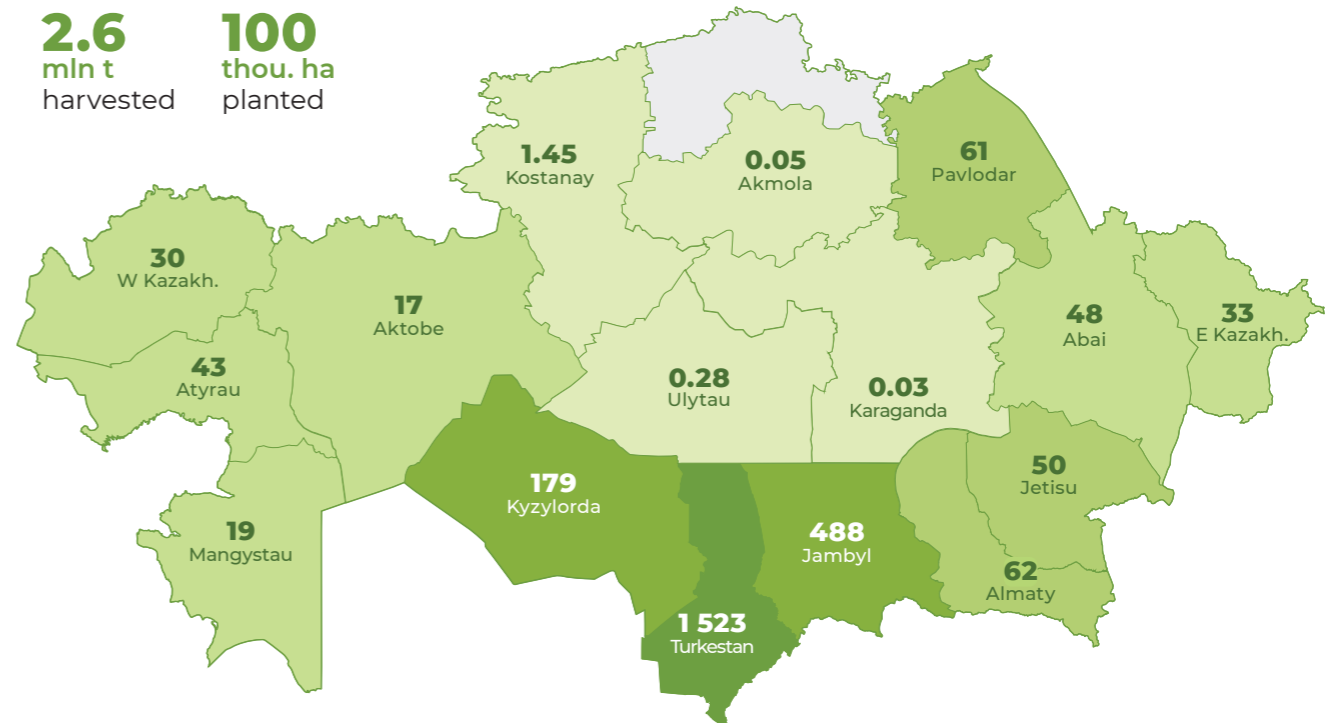
### Production of open field and greenhouse vegetables in 2022, thou. t

**4.8** mln t harvested  
**170** thou. ha planted

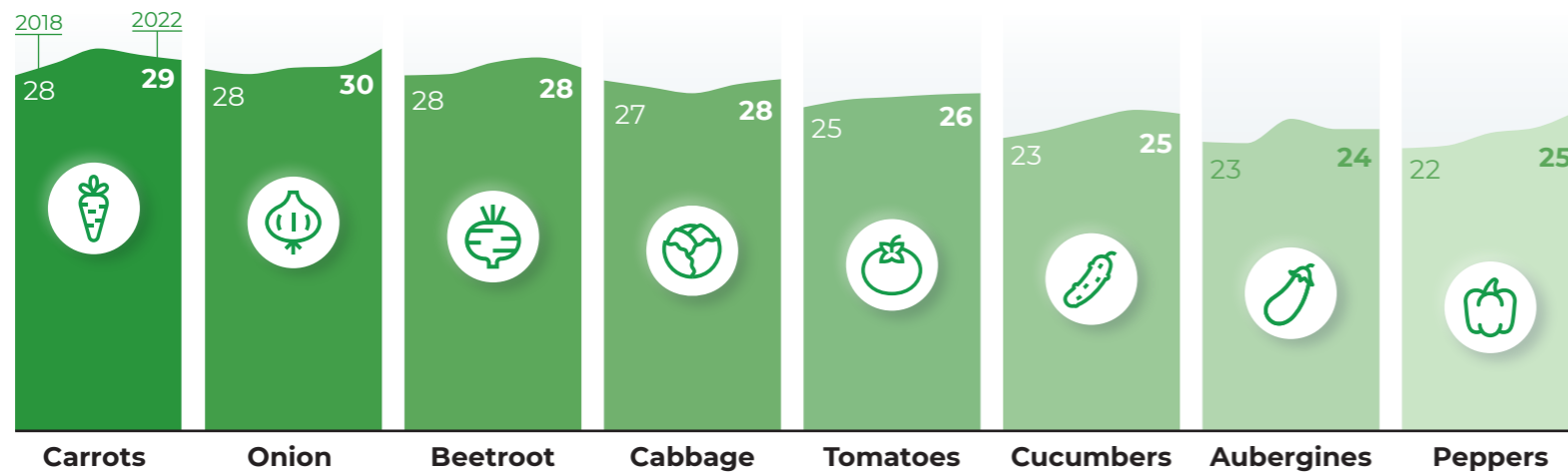


### Gourds production in 2022, thou. t

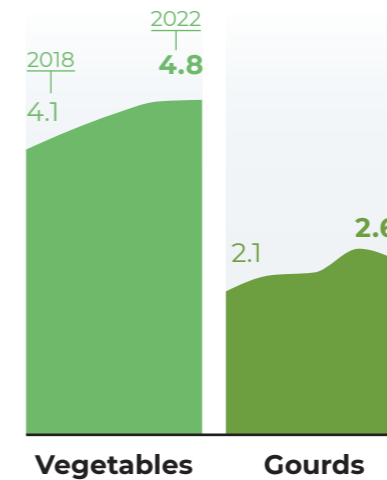
**2.6** mln t harvested  
**100** thou. ha planted



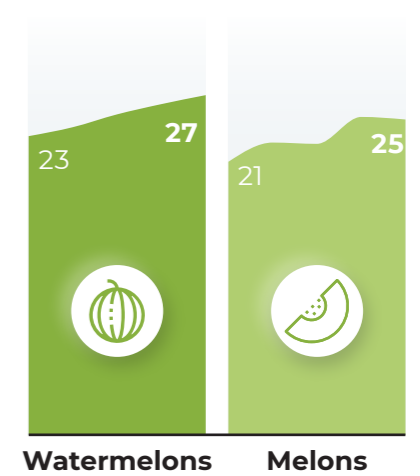
### Vegetable yield, t/ha



### Production, mln t

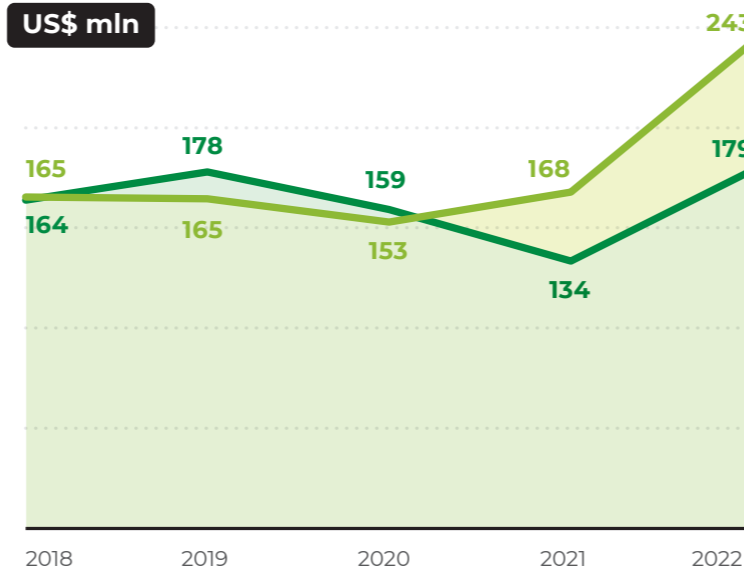
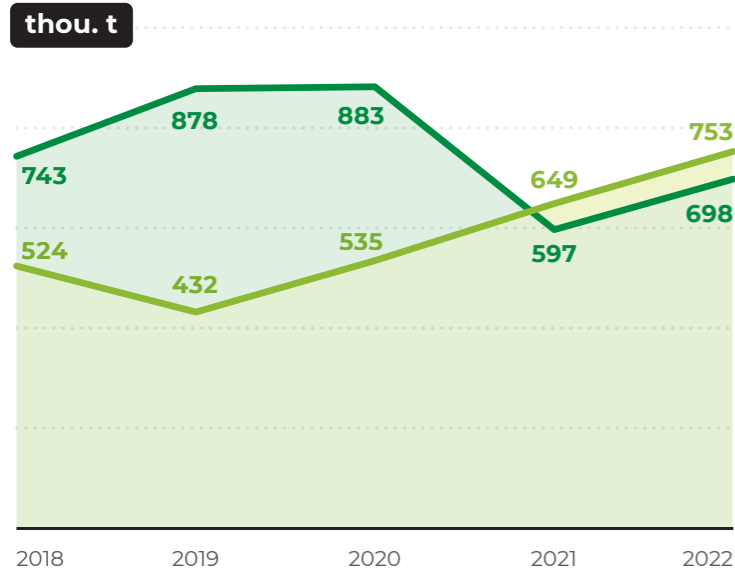


### Gourds yield, t/ha

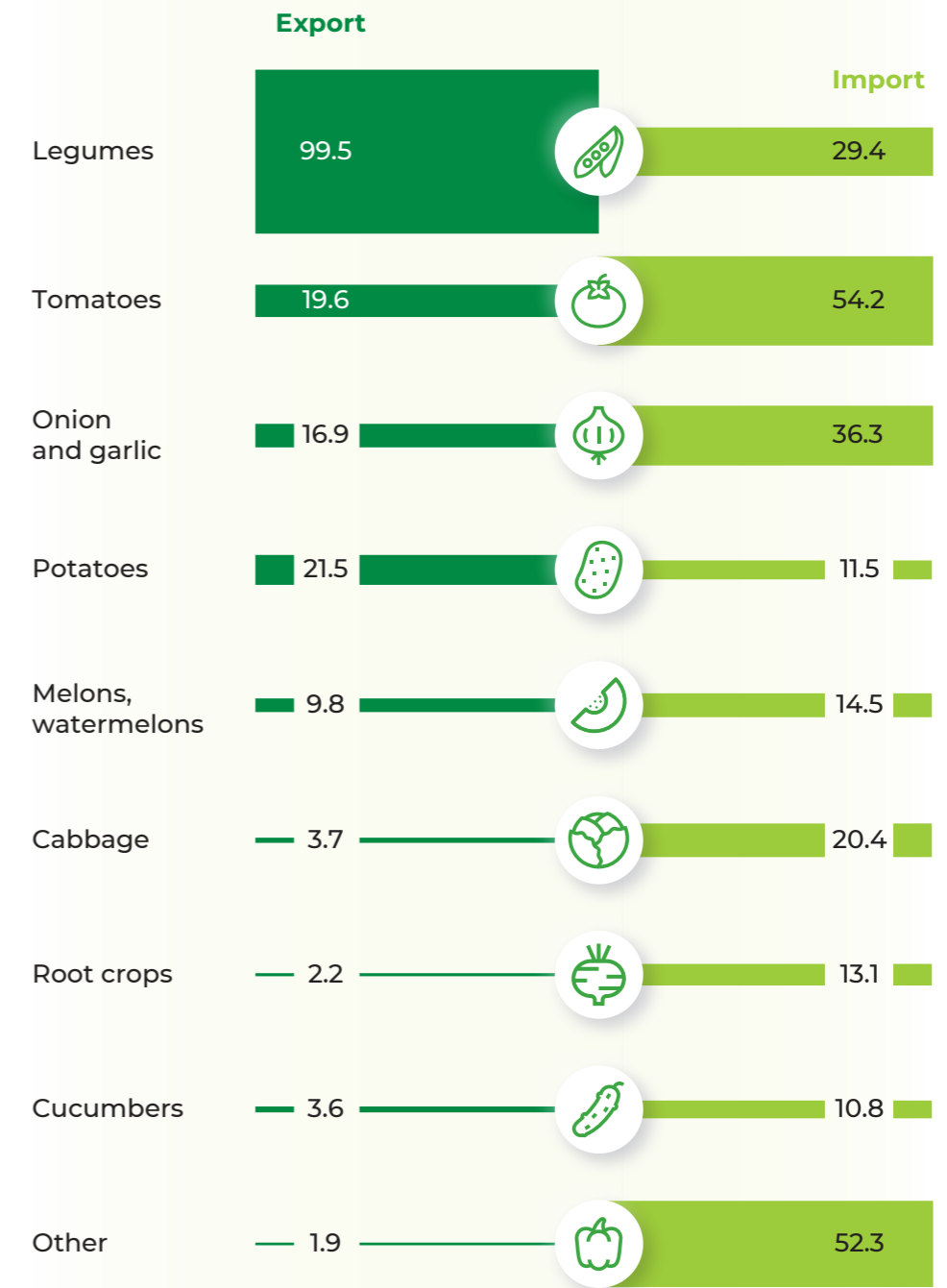




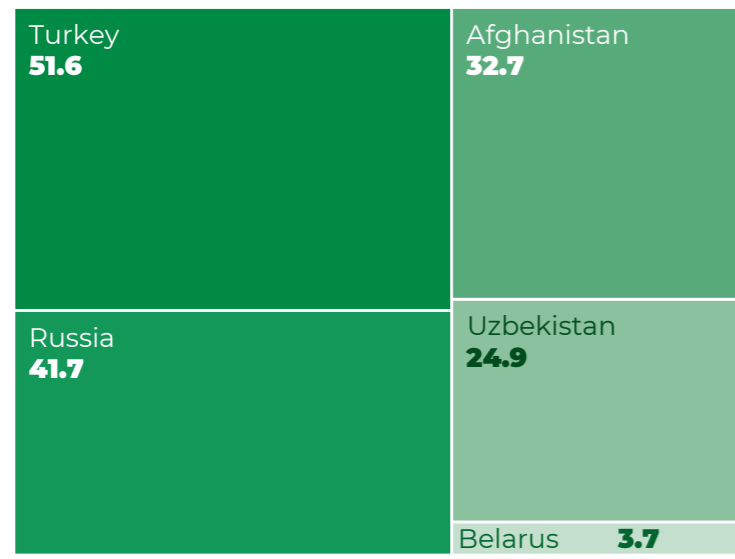
## Export and import of vegetables



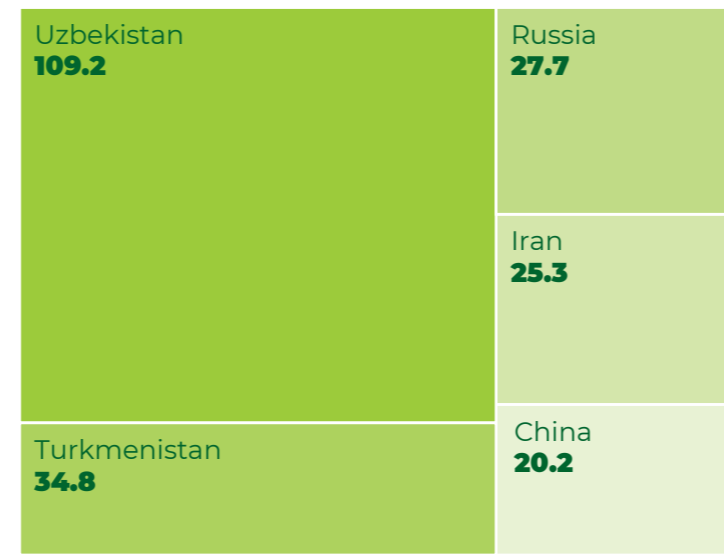
## Export and import structure in 2022, US\$ mln



## Top 5 directions of vegetable exports from Kazakhstan in 2022, US\$ mln

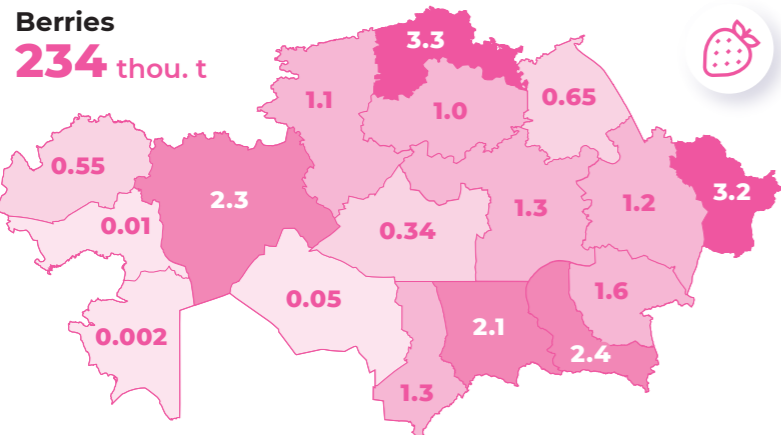
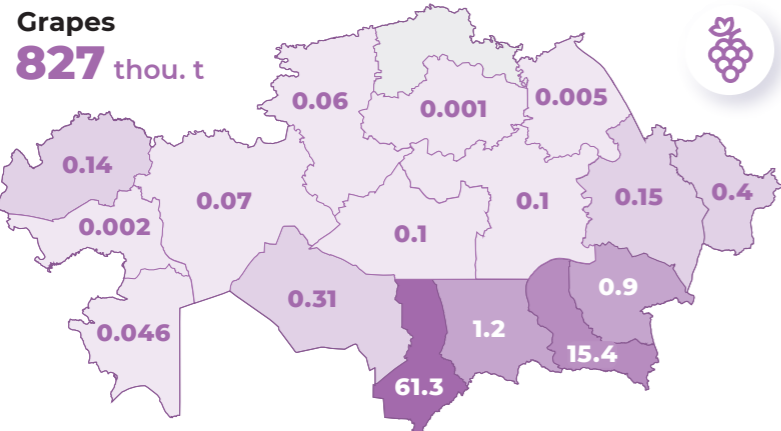
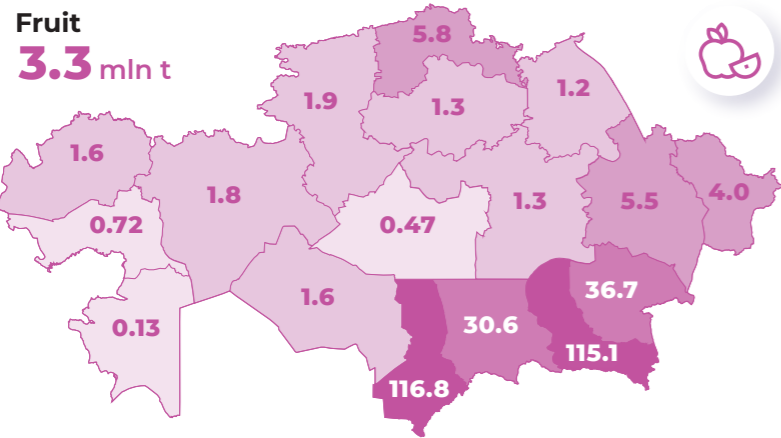


## Top 5 directions of vegetable imports into Kazakhstan in 2022, US\$ mln

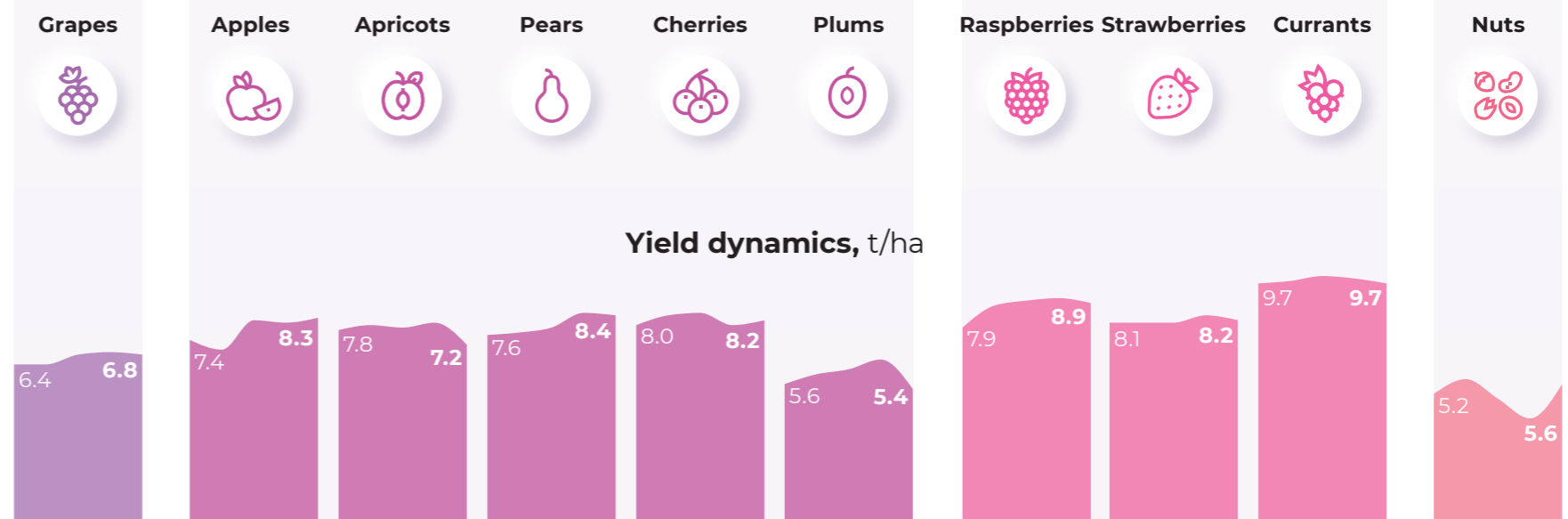
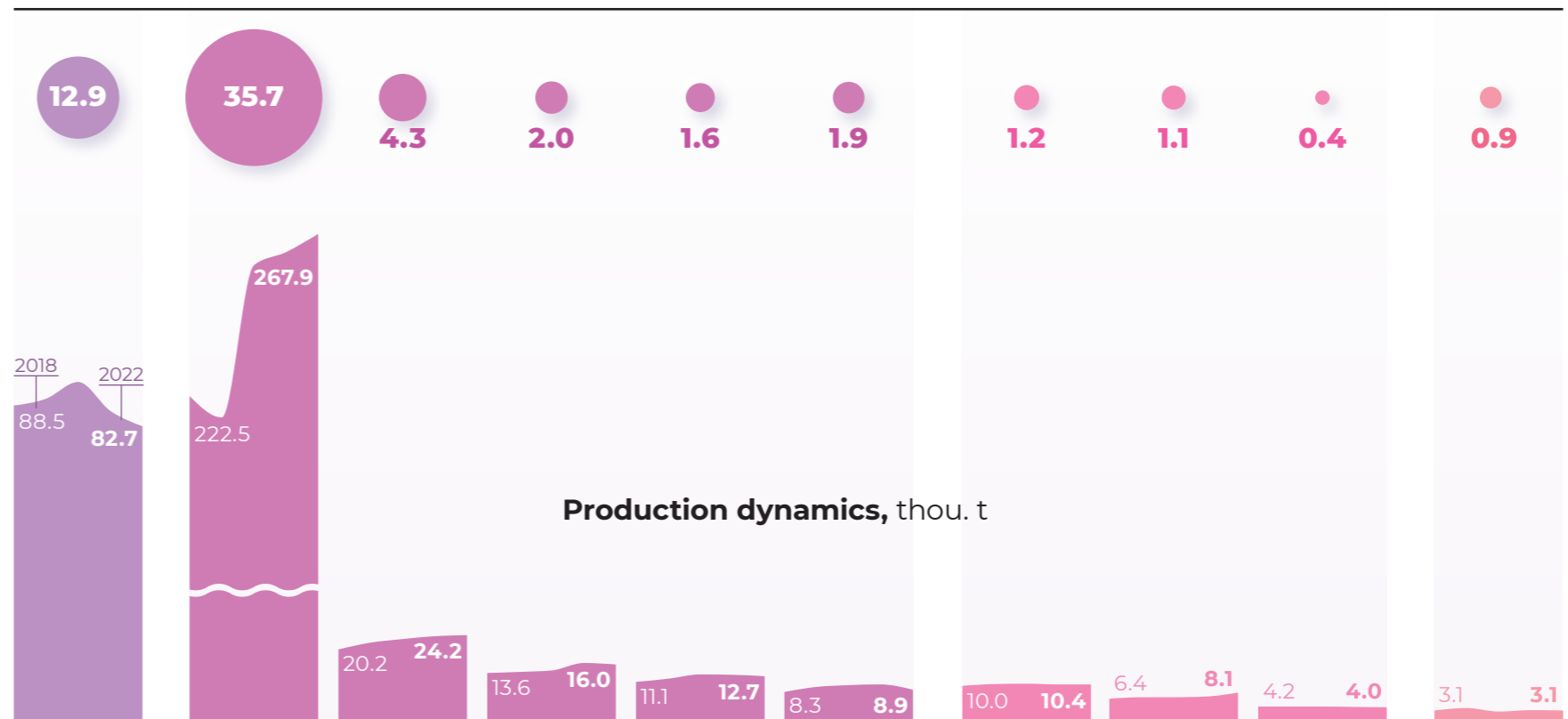




Production в 2022 г., thou. t

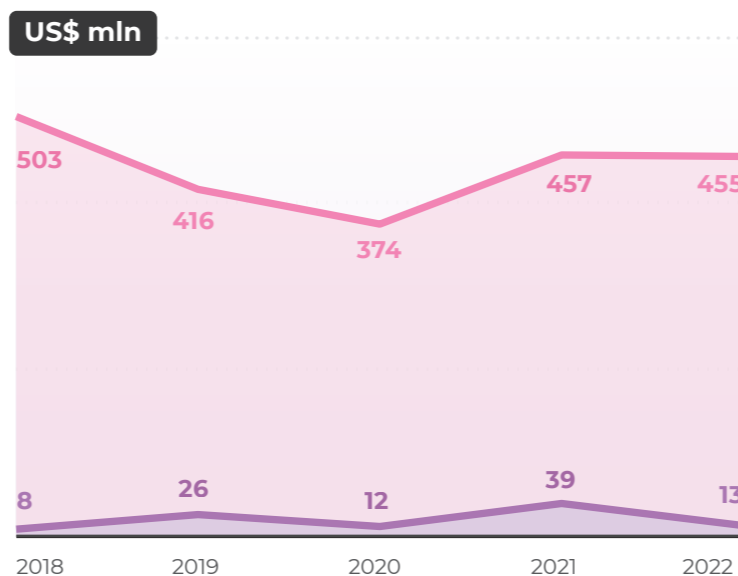
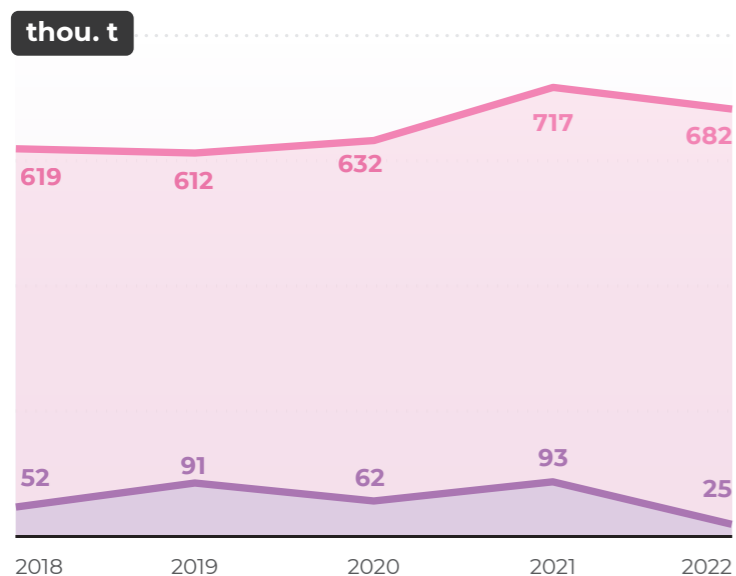


Area in 2022, thou. ha

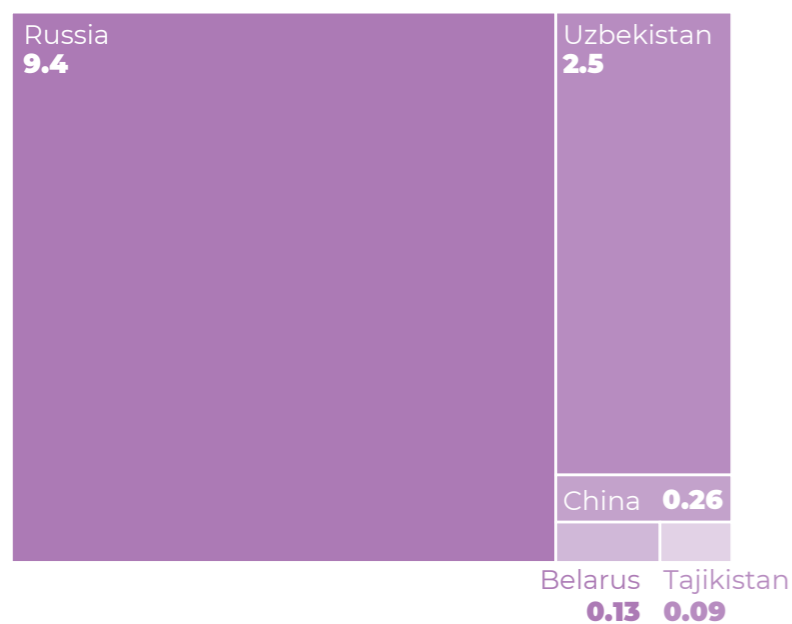




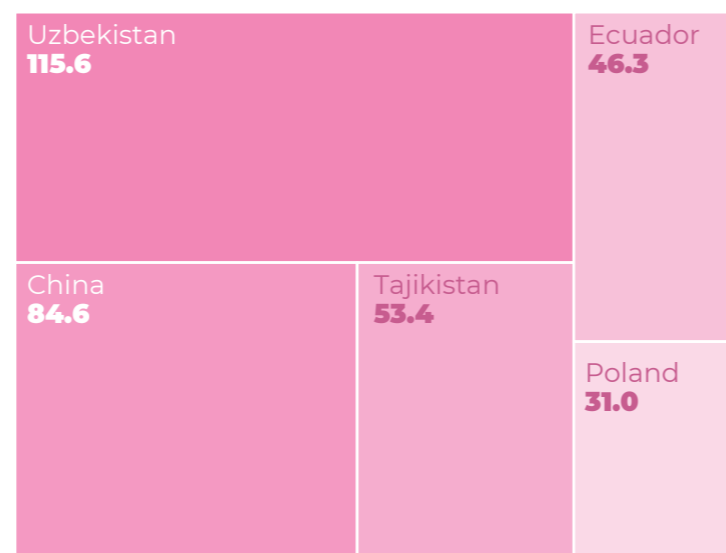
## Export and import of fruits and berries



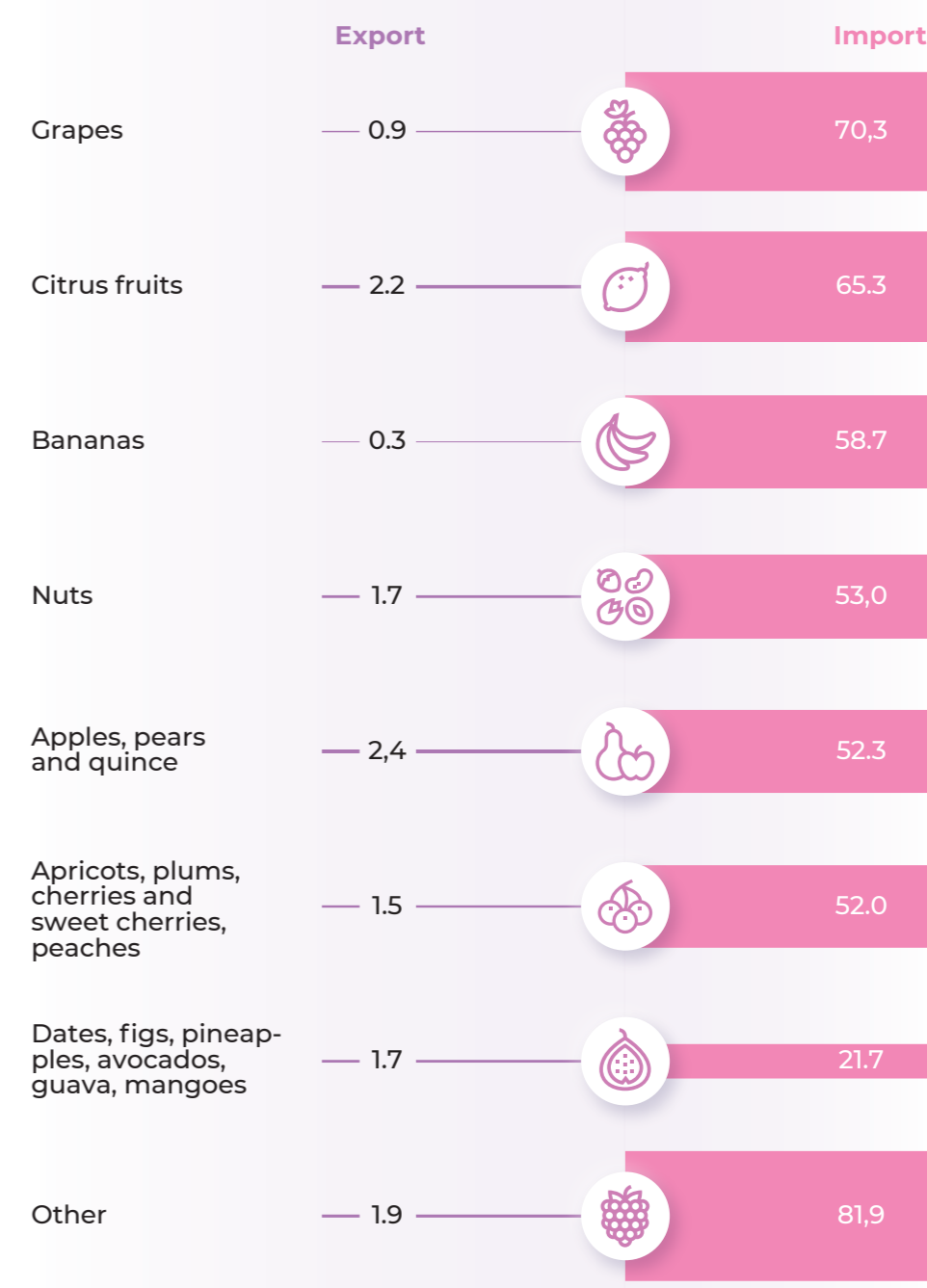
## Top 5 directions of fruit and berry exports from Kazakhstan in 2022, US\$ mln



## Top 5 directions of fruit and berry imports into Kazakhstan in 2022, US\$ mln



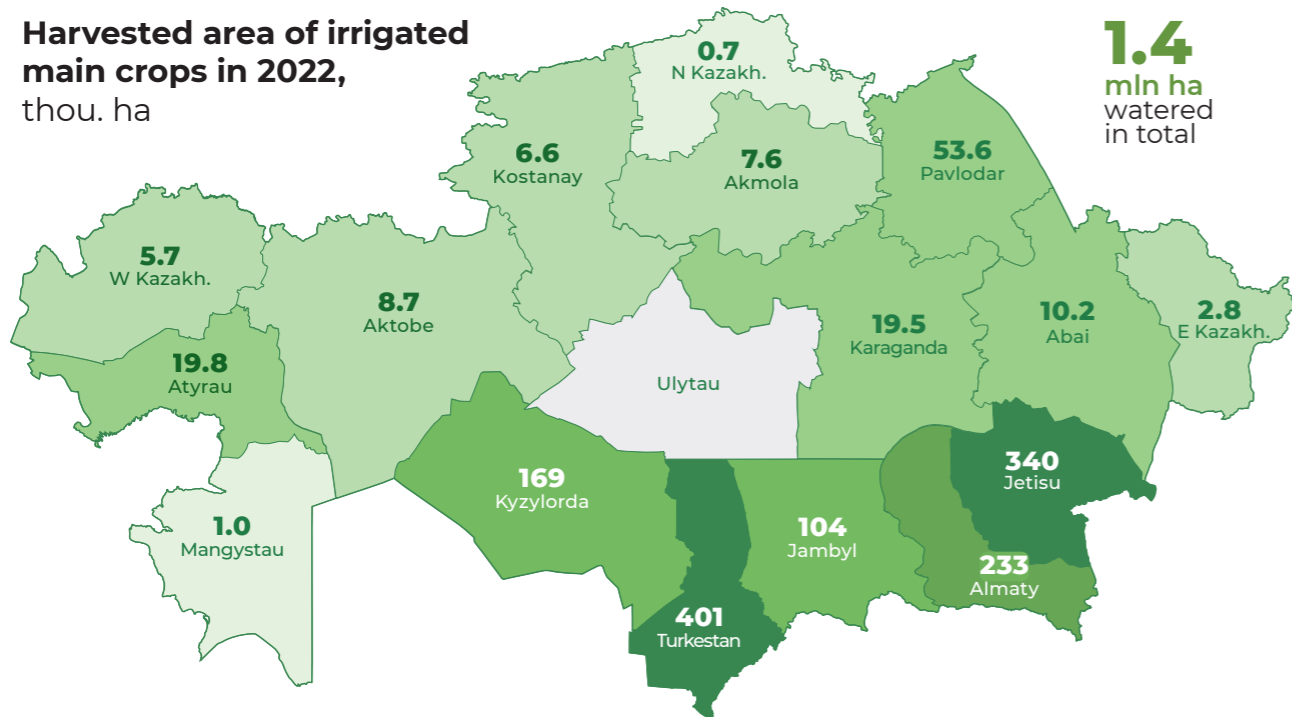
## Export and import structure in 2022, US\$ mln





Harvested area of irrigated main crops in 2022, thou. ha

1.4 mln ha watered in total



Ditch irrigation

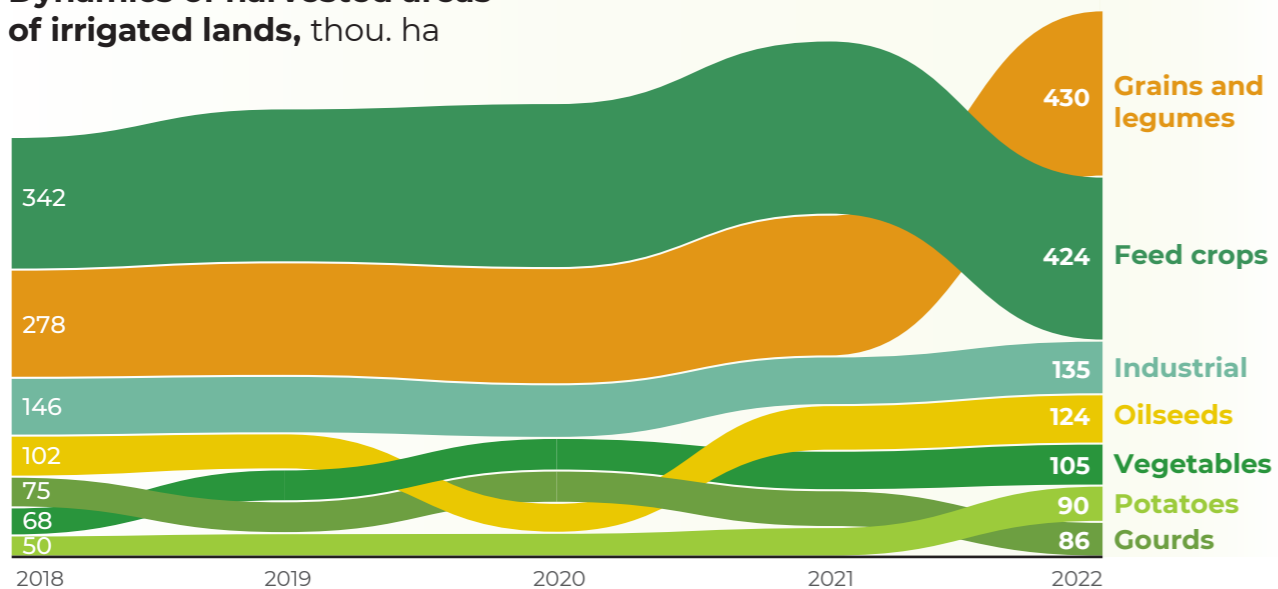
Types of irrigation

Drip or sprinkler irrigation

1.1 mln ha

280 thou. ha

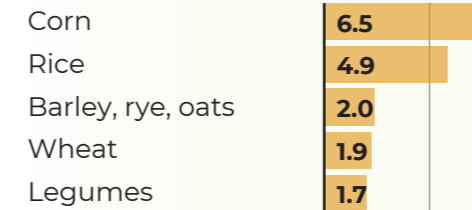
Dynamics of harvested areas of irrigated lands, thou. ha



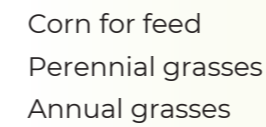
Yield of irrigated main crops in 2022, t/ha

Grains and legumes

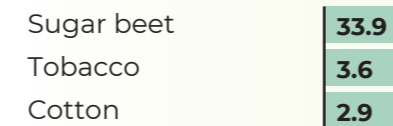
4.2 t/ha average yield



Feed crops



Industrial



Oilseeds

2.1 t/ha



Vegetables

28.4 t/ha

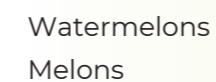


Potatoes

22.8

Gourds

26.2 t/ha





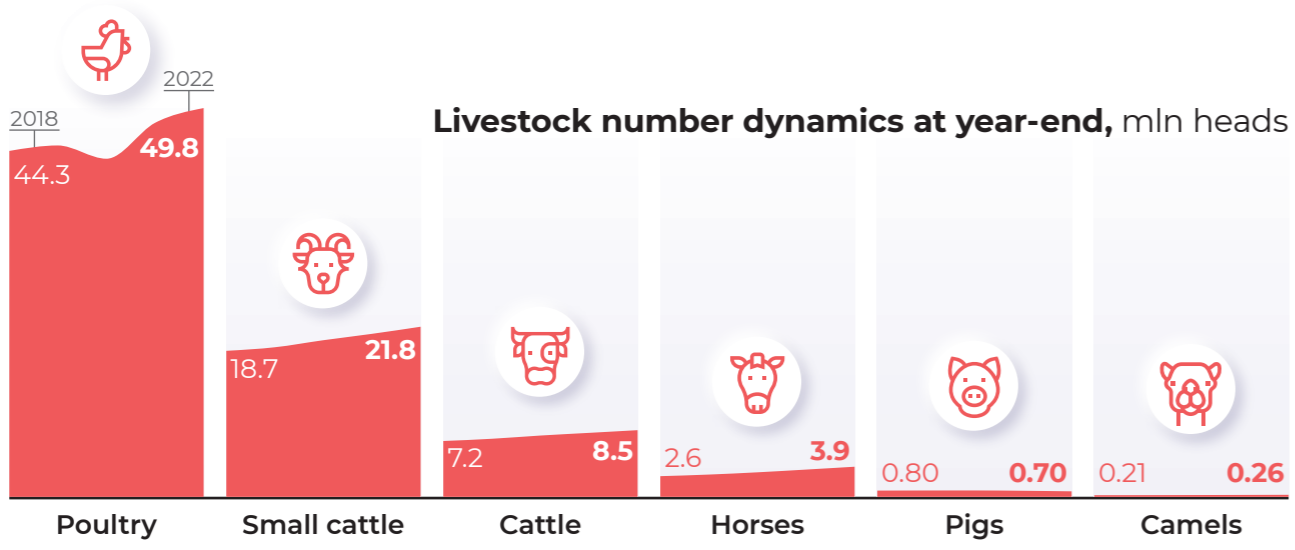
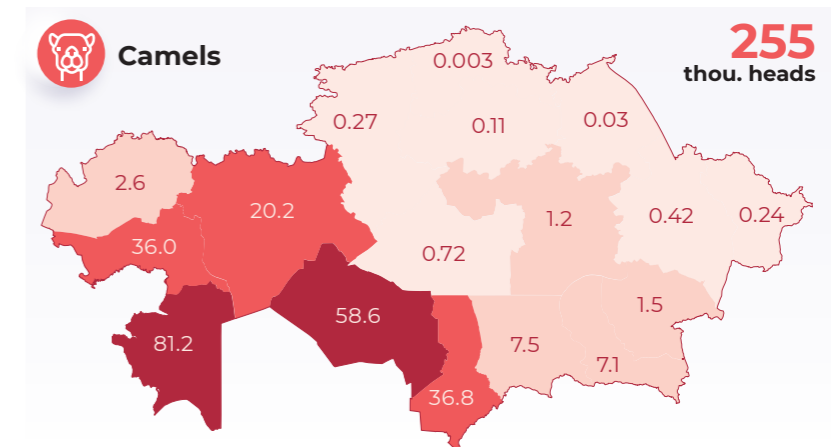
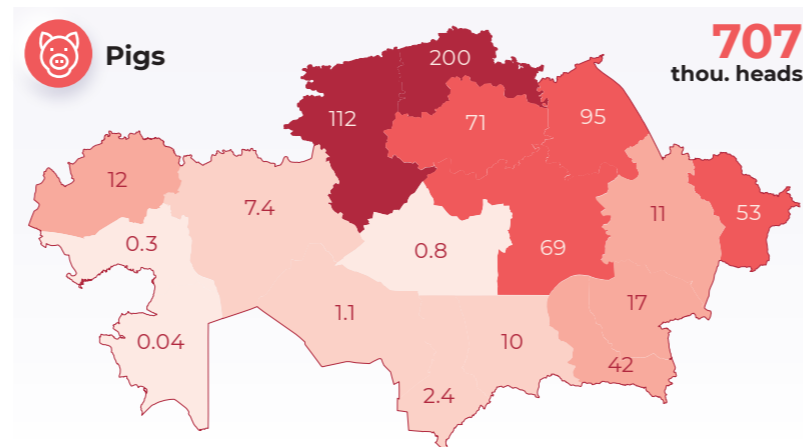
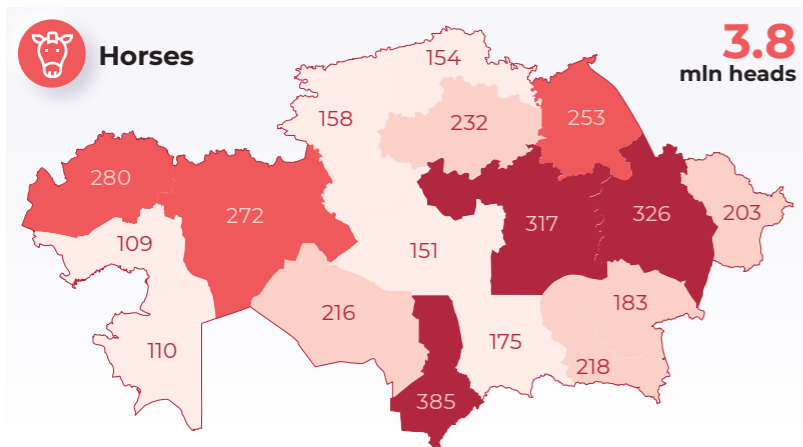
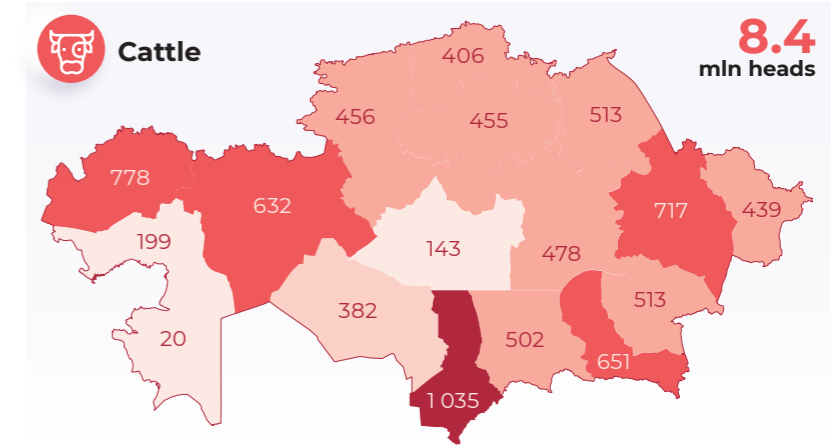
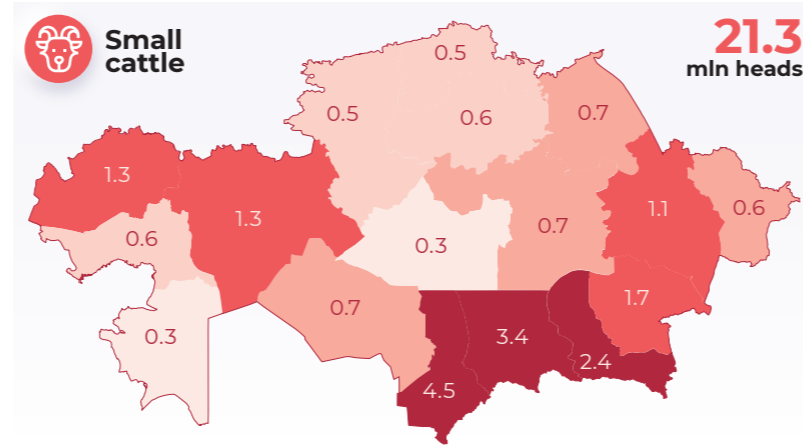
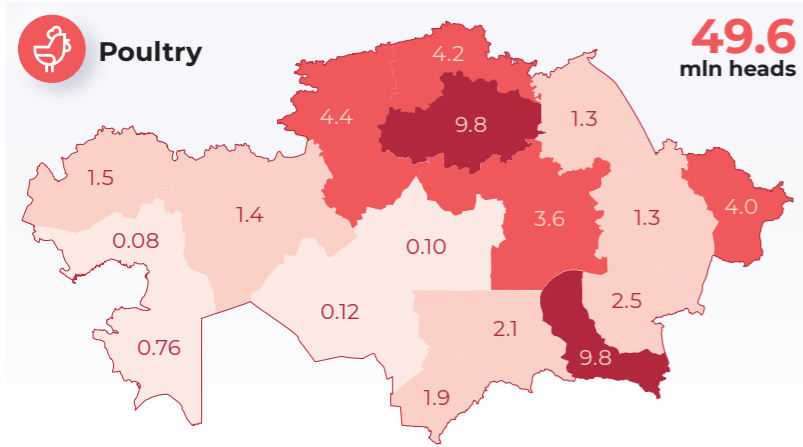
# LIVESTOCK PRODUCTION





# NUMBER OF FARM ANIMALS

# LIVESTOCK PRODUCTION



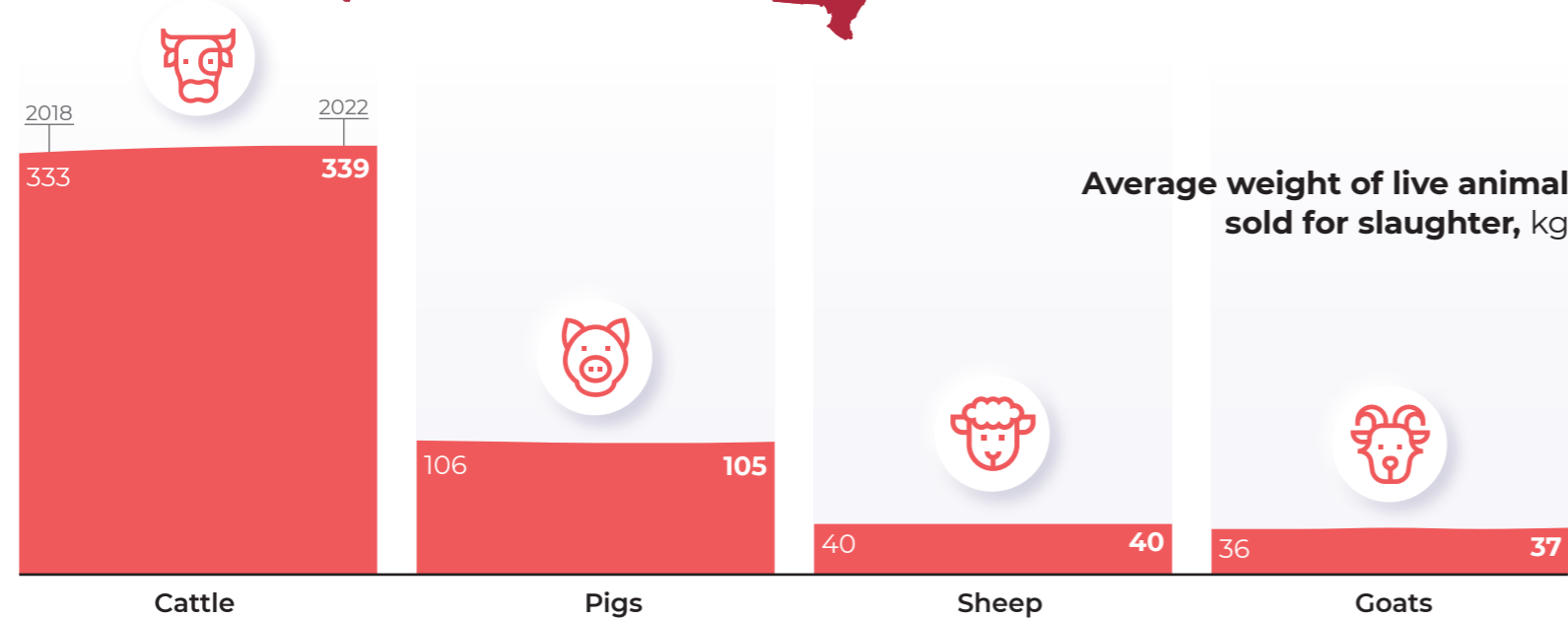
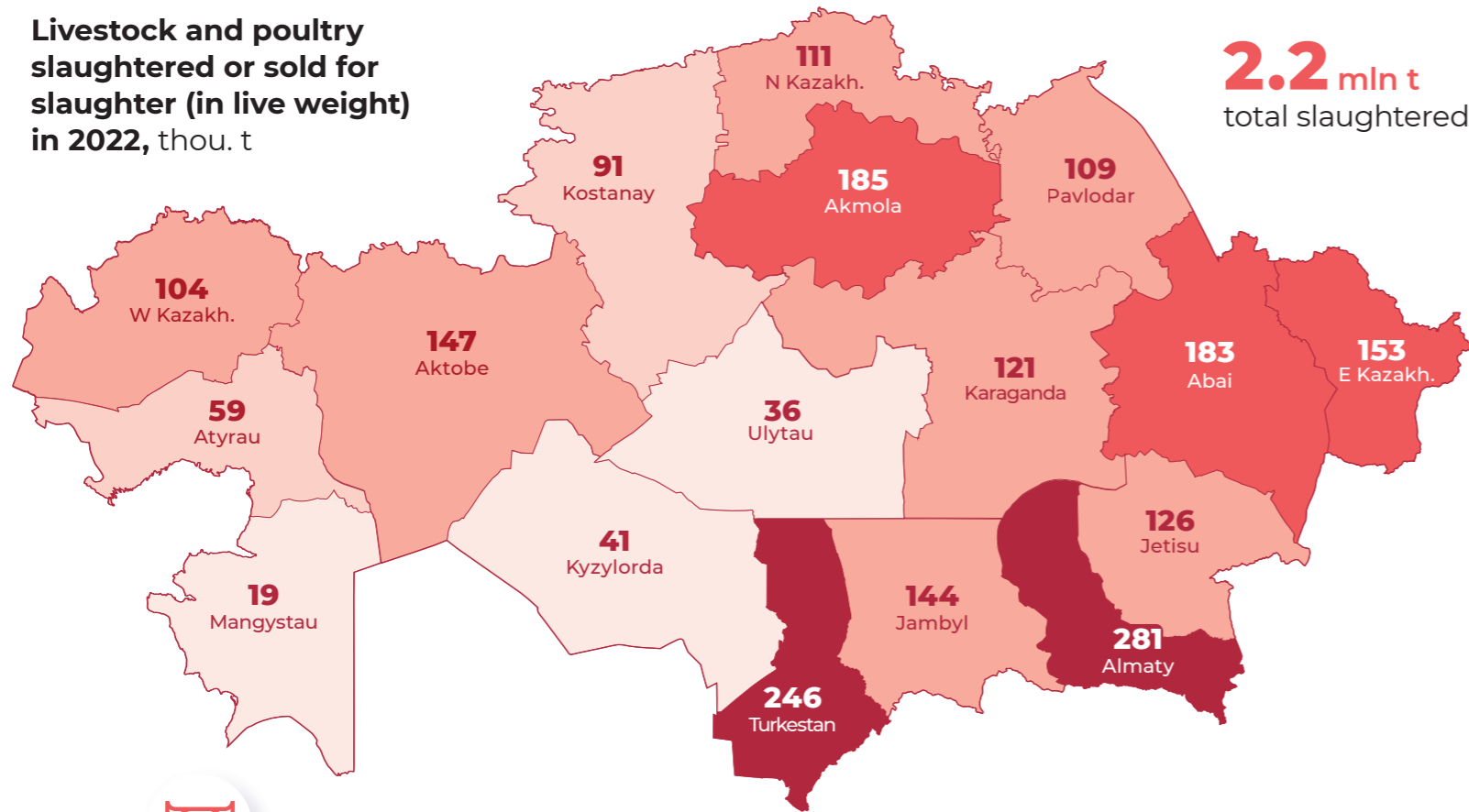
**TOP 5 countries of import/export of live animals in 2022, \$ bln**

Export					\$3.6 mln Kazakhstan
2.5	2.0	2.0	1.4	1.2	
France	Netherlands	Canada	Germany	Denmark	
Import					\$38.7 mln Kazakhstan
3.7	2.5	1.6	1.4	1.1	
USA	Italy	Netherlands	Germany	Hong Kong	



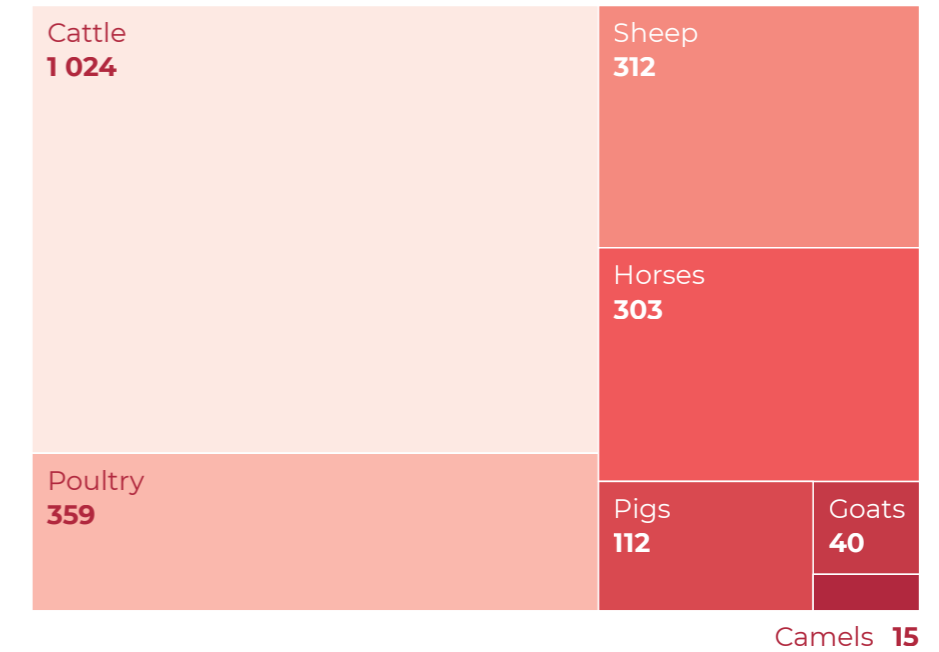
# MEAT LIVESTOCK: PRODUCTION

Livestock and poultry slaughtered or sold for slaughter (in live weight) in 2022, thou. t

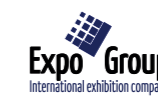
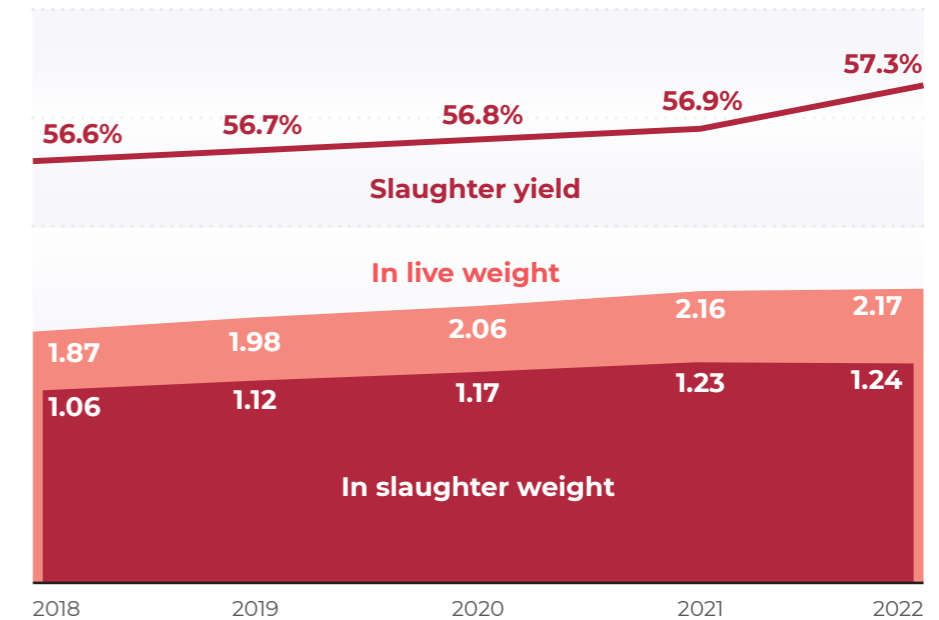


# LIVESTOCK PRODUCTION

Structure of livestock slaughter, mln t



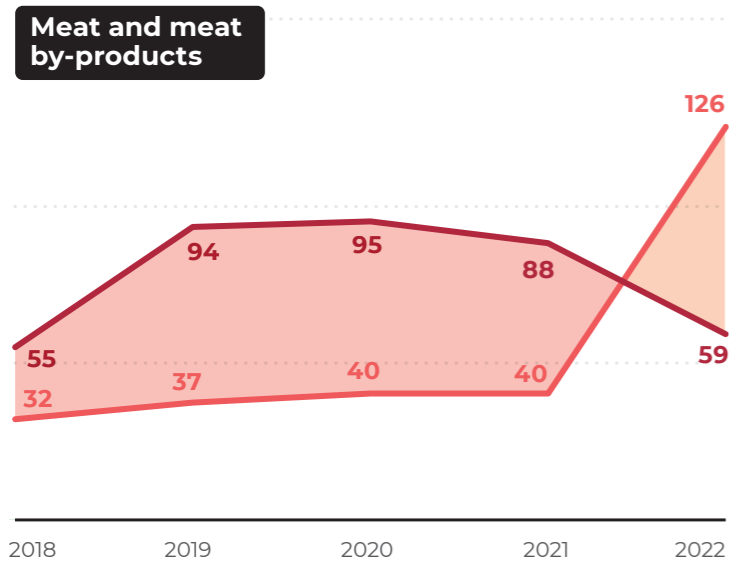
Slaughter productivity of livestock and poultry of all species, mln t



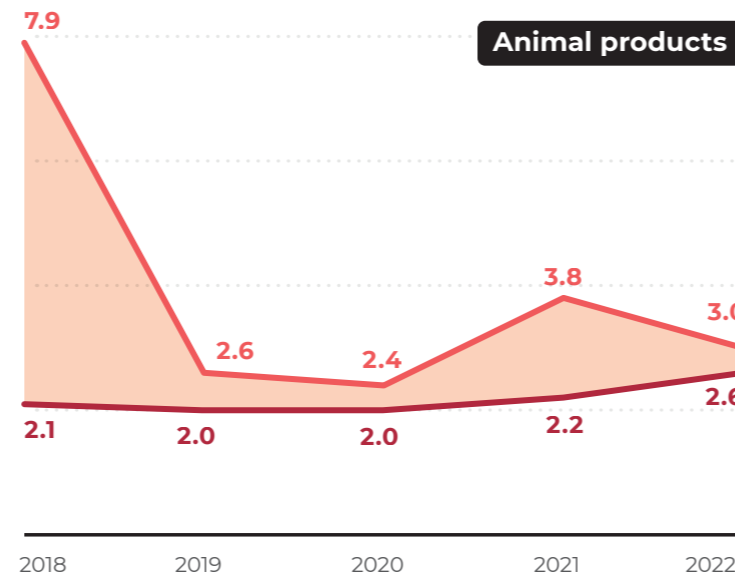
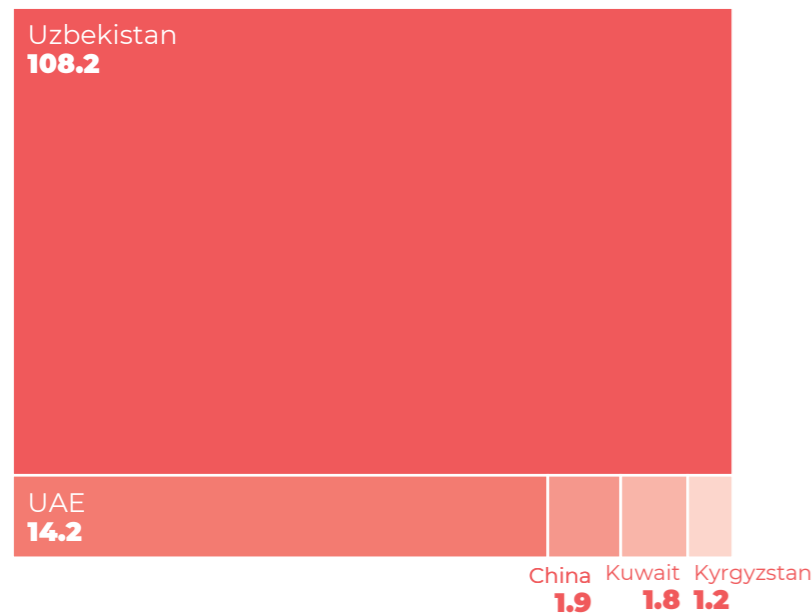


# MEAT LIVESTOCK: TRADE

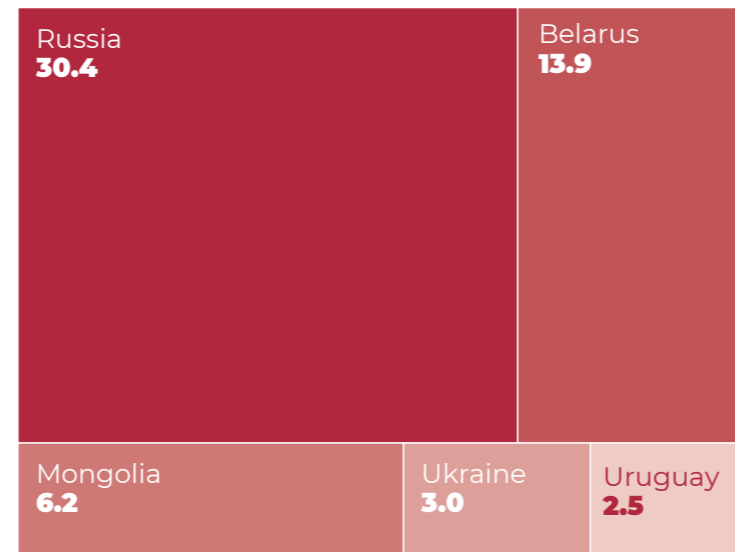
Export and import, US\$ mln



Top 5 directions of export from Kazakhstan in 2022, US\$ mln

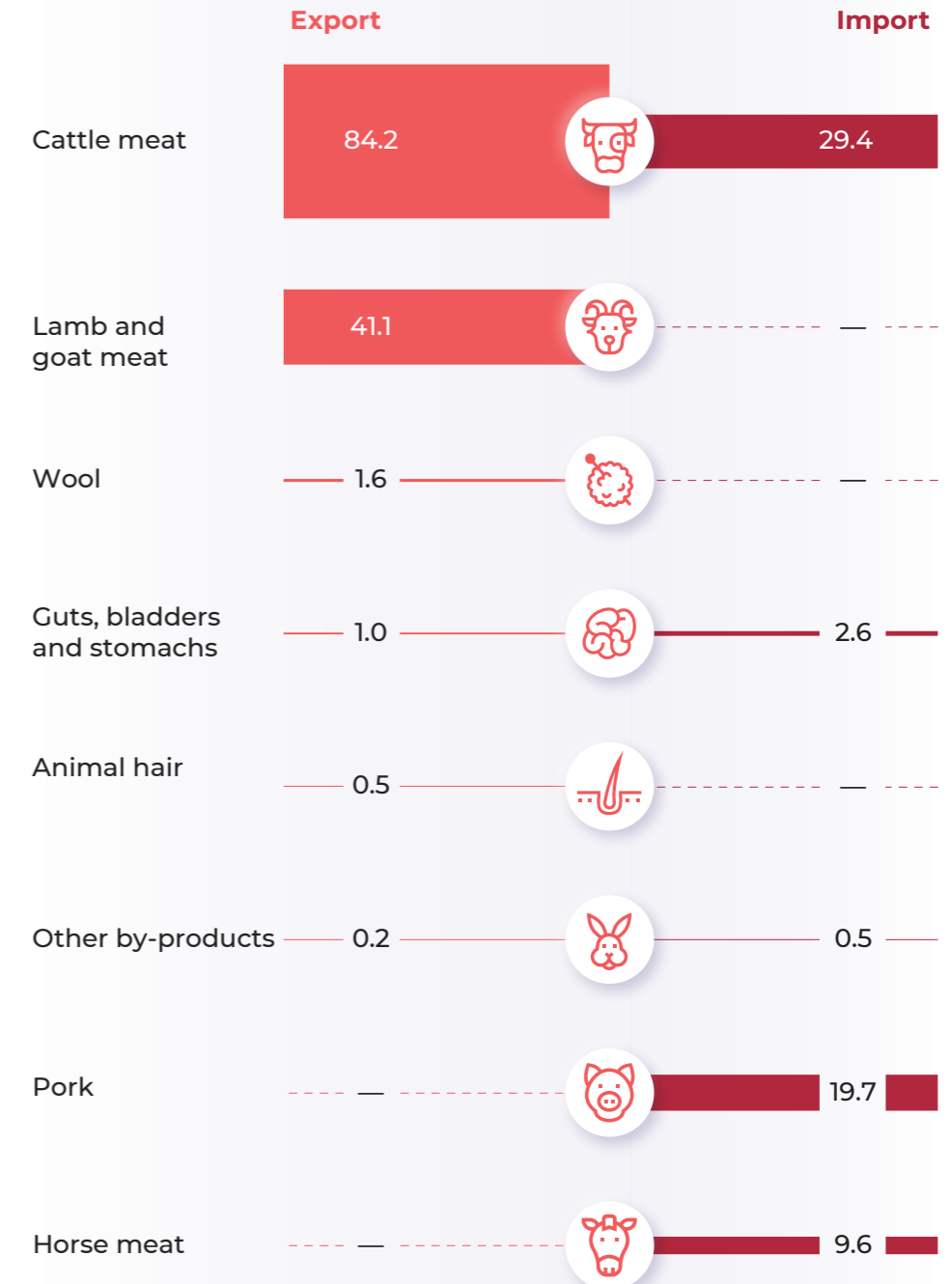


Top 5 directions of import to Kazakhstan in 2022, US\$ mln



# LIVESTOCK PRODUCTION

Structure of exports and imports in 2022, US\$ mln



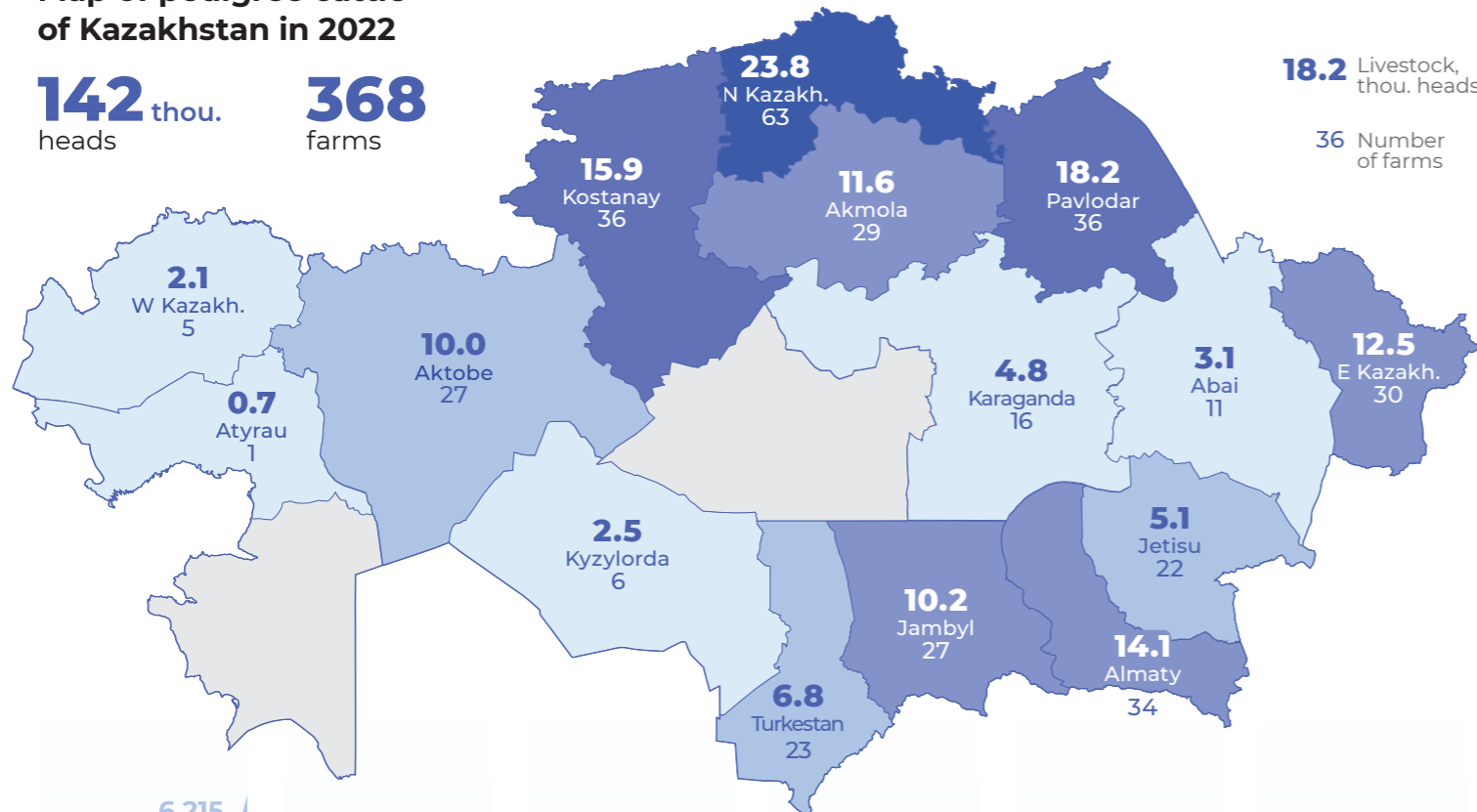


# DAIRY FARMING: PEDIGREE ANIMALS

# LIVESTOCK PRODUCTION

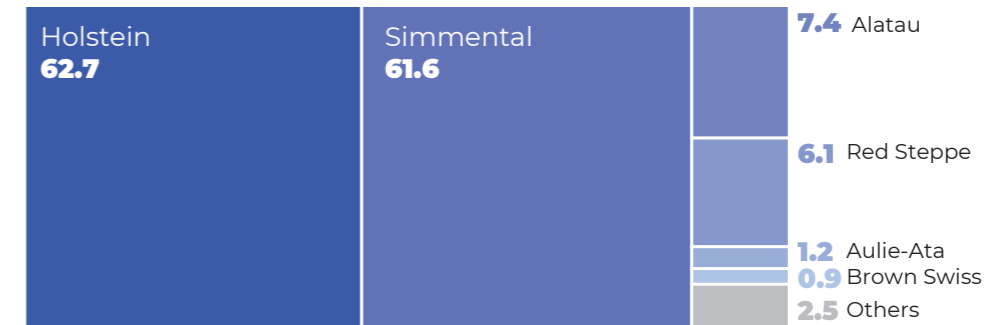
### Map of pedigree cattle of Kazakhstan in 2022

**142** thou. heads  
**368** farms

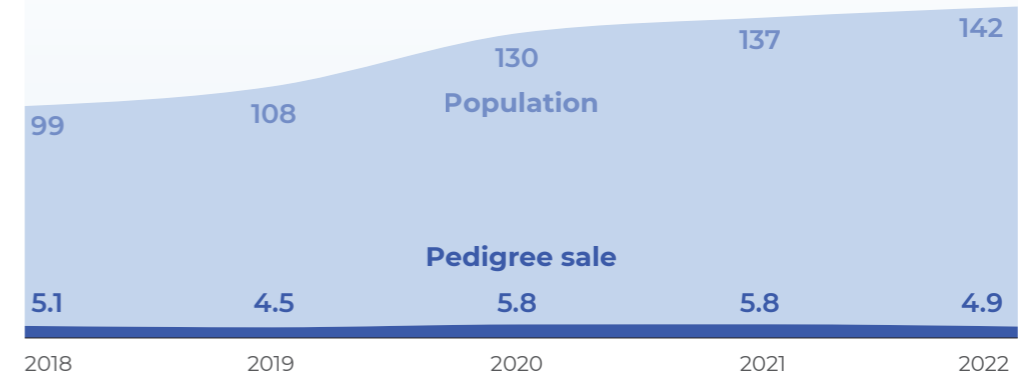


**18.2** Livestock, thou. heads  
**36** Number of farms

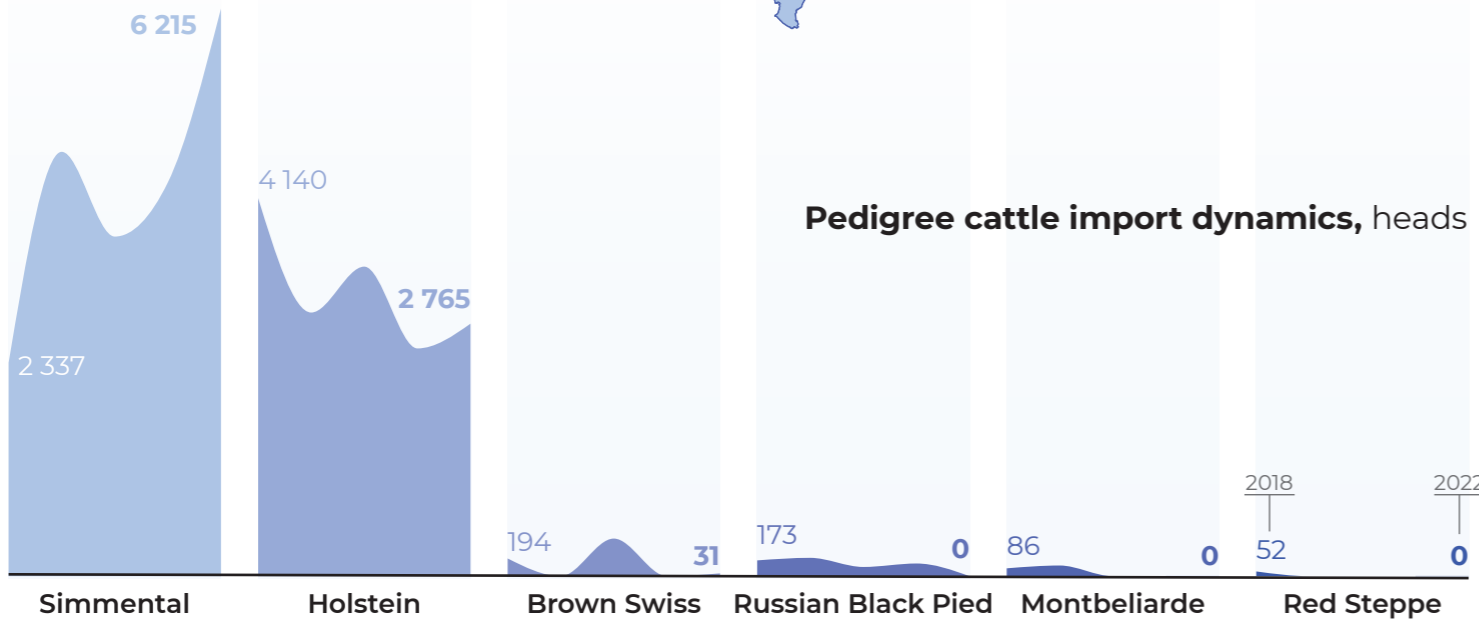
### Structure of dairy breeds as of 01/01/2023, thou. heads



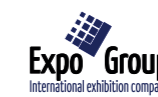
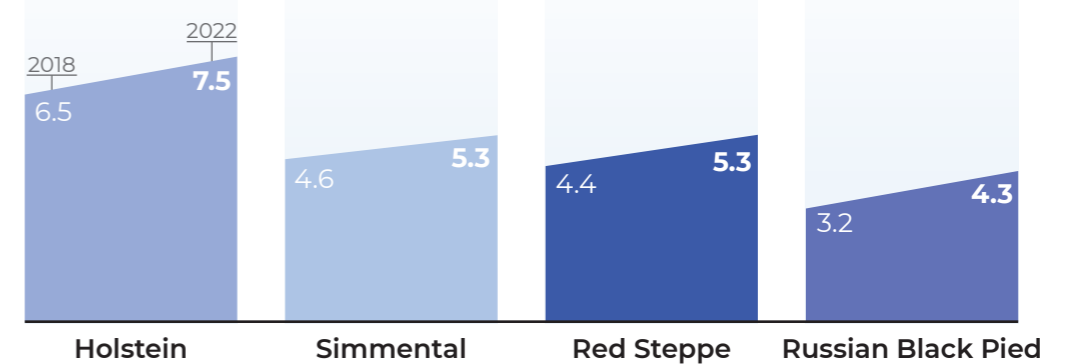
### Population and sale of pedigree cattle, thou. heads



### Pedigree cattle import dynamics, heads



### Dairy productivity by breeds, tons per season



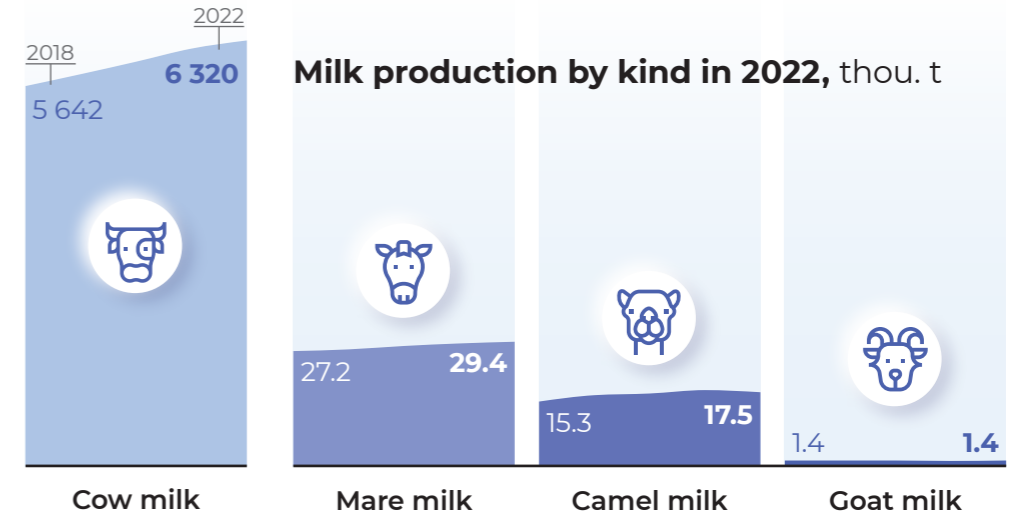
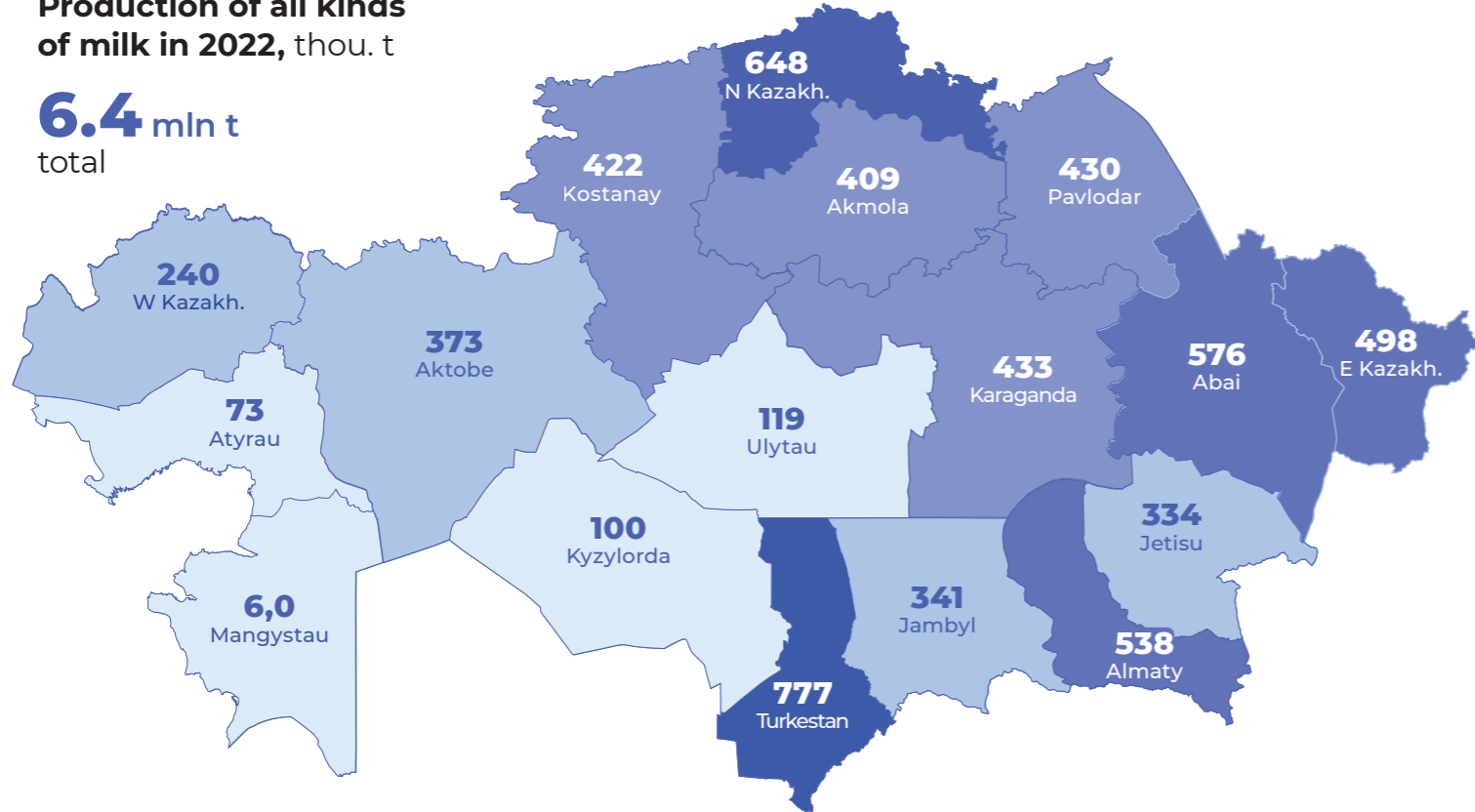


# DAIRY FARMING: PRODUCTION

# LIVESTOCK PRODUCTION

Production of all kinds of milk in 2022, thou. t

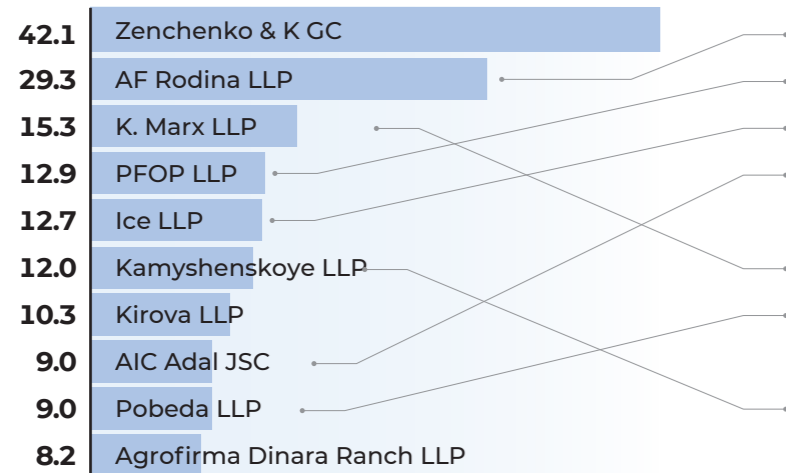
**6.4** mln t total



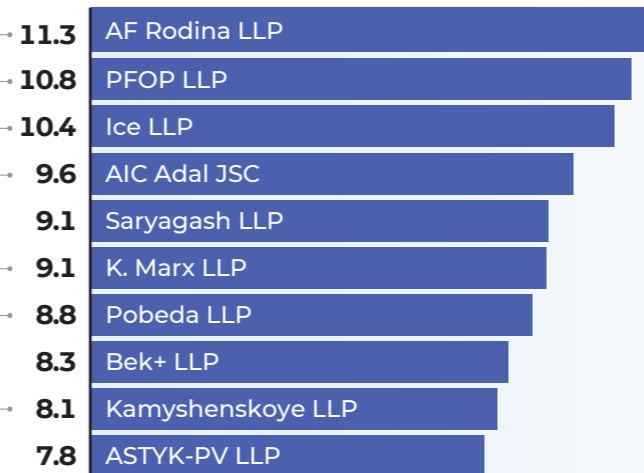
Milk production by farm category in 2022, mln t



TOP 10 farms by gross output of milk in 2022, thou. t



TOP 10 farms by dairy productivity in 2022., t/cow/season

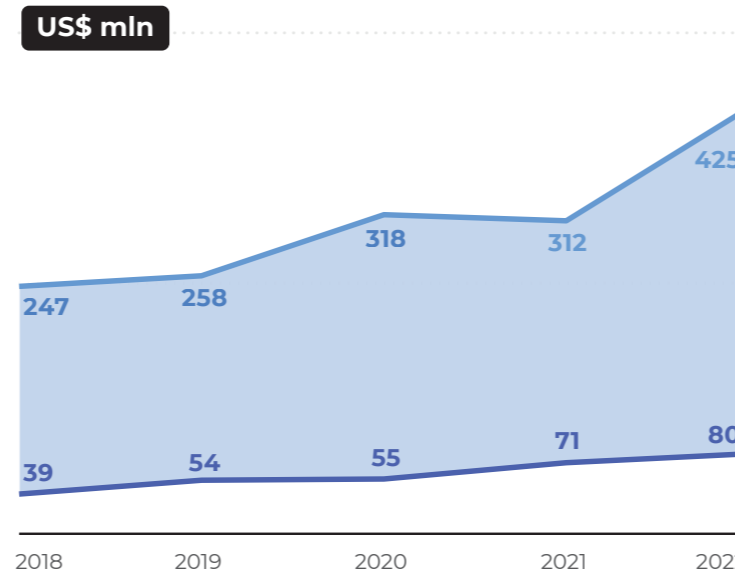
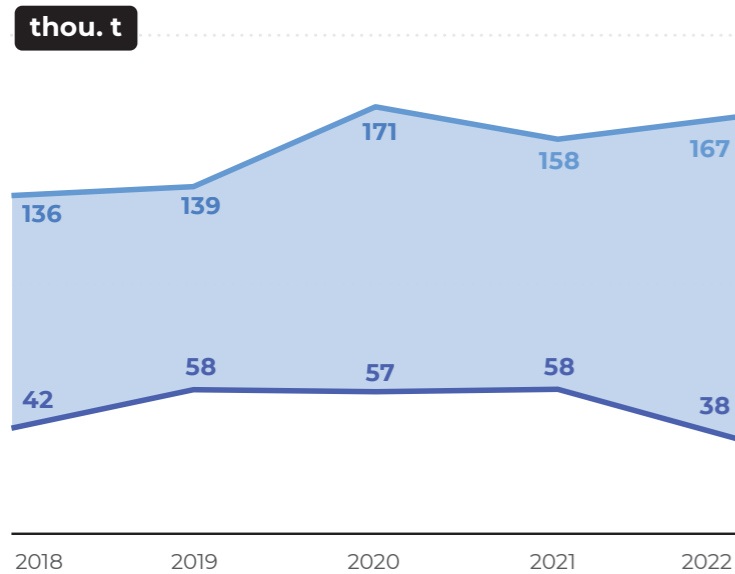


TOP 5 countries by dairy cattle population in July 2023, mln heads

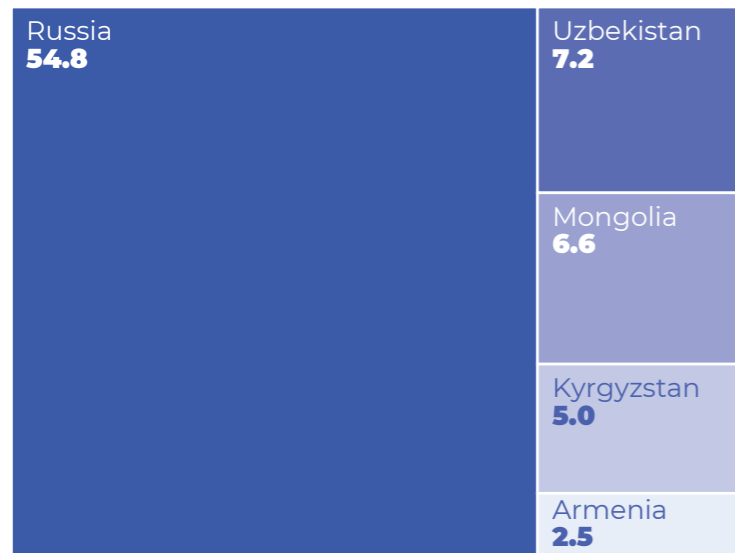




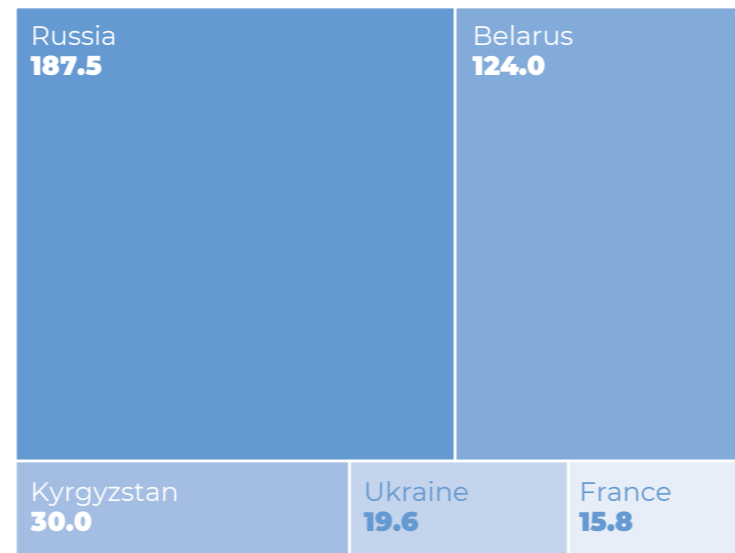
## Export and import of milk and dairy products



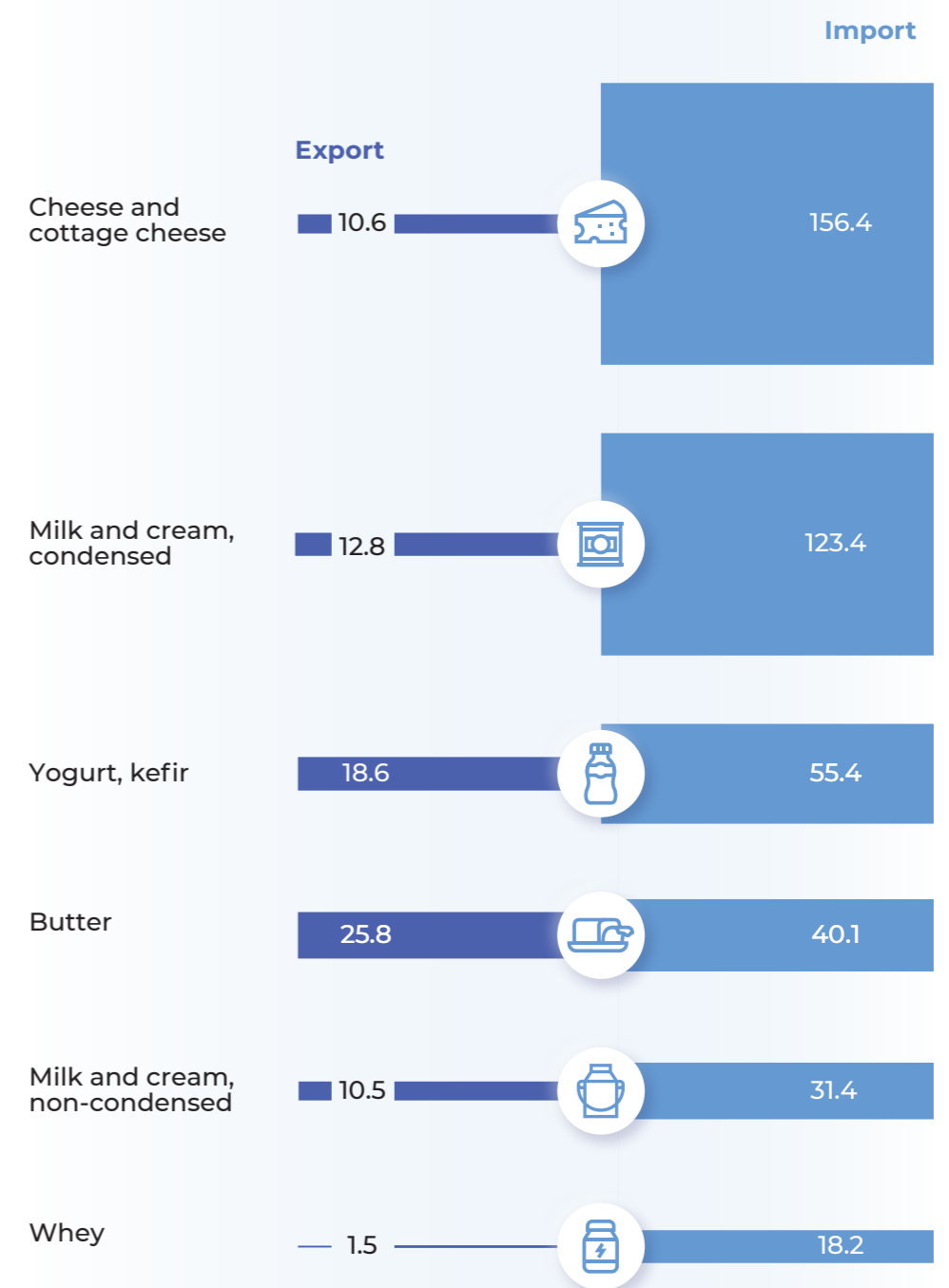
## Top 5 directions of export from Kazakhstan in 2022, US\$ mln



## Top 5 directions of import to Kazakhstan in 2022, US\$ mln



## Structure of exports and imports in 2022, US\$ mln

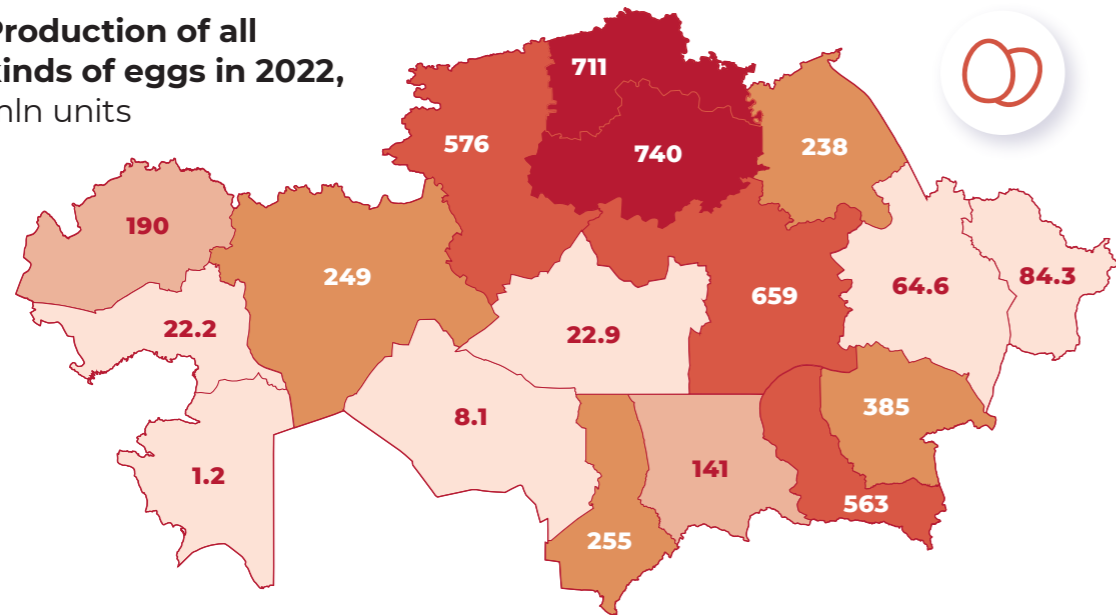




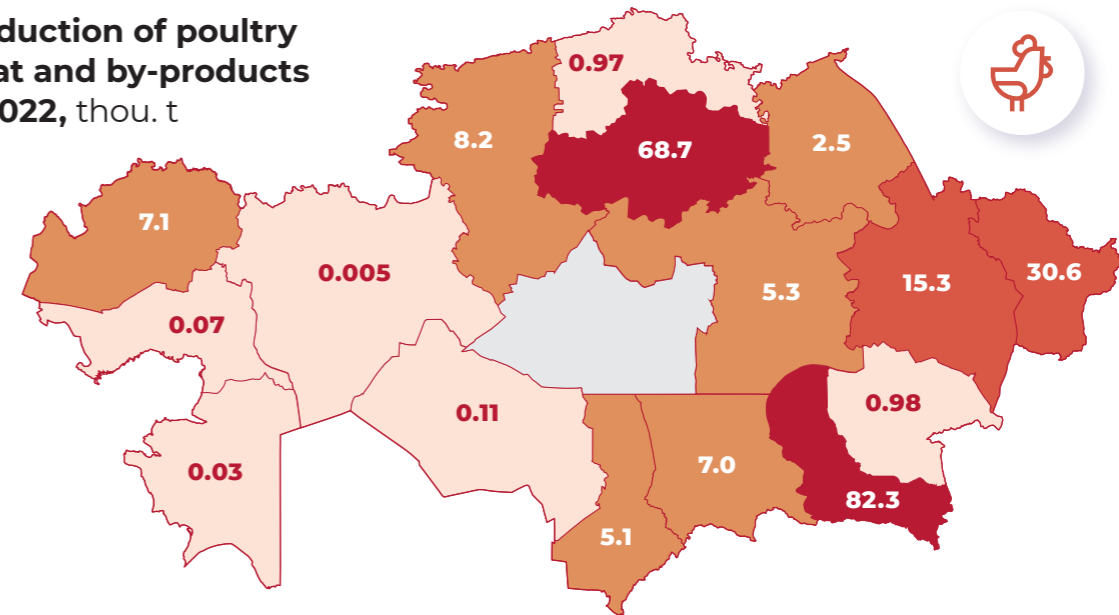
# POULTRY FARMING IN KAZAKHSTAN

# LIVESTOCK PRODUCTION

### Production of all kinds of eggs in 2022, mln units



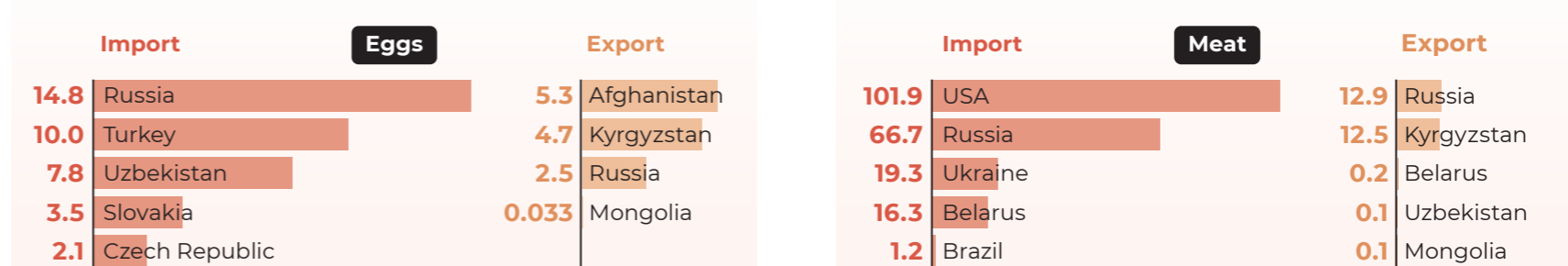
### Production of poultry meat and by-products in 2022, thou. t



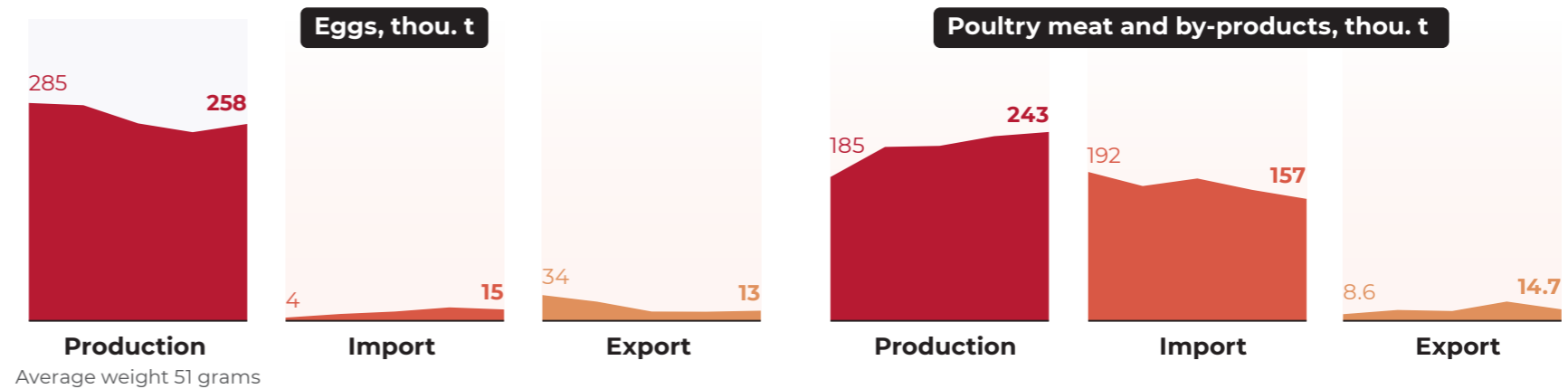
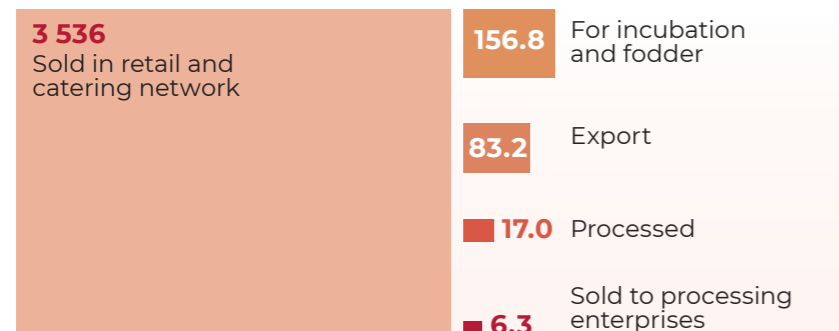
### Structure of egg production in 2022, mln units



### Top trade directions in 2022, US\$ mln



### Consumption of chicken eggs in 2022, mln units





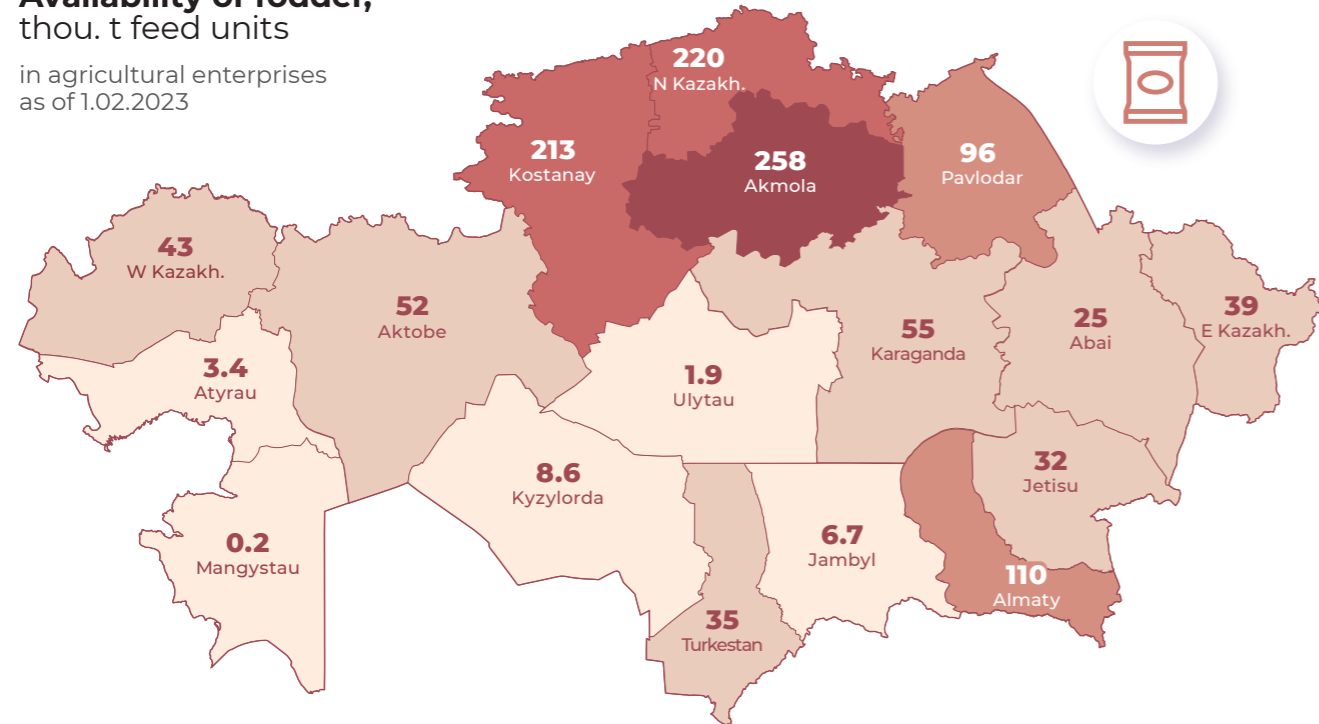


# FEED SUPPLY IN KAZAKHSTAN

# LIVESTOCK PRODUCTION

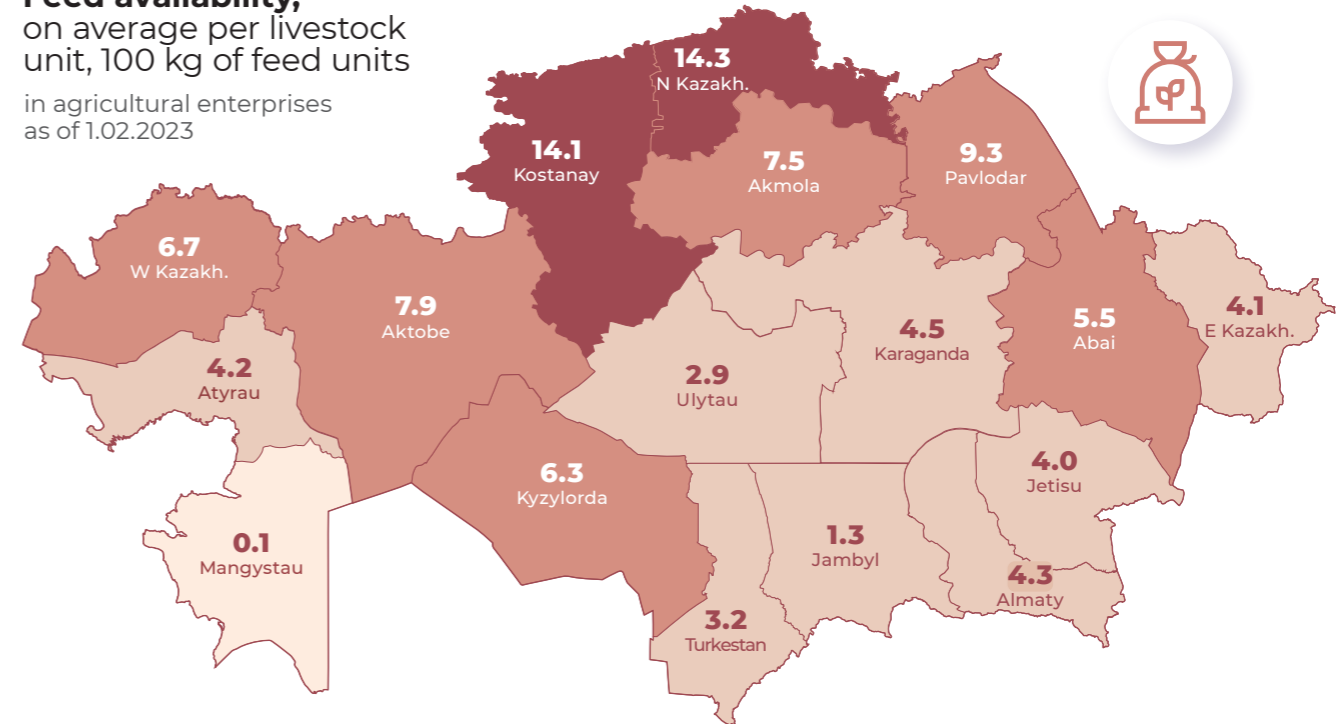
## Availability of fodder, thou. t feed units

in agricultural enterprises as of 1.02.2023

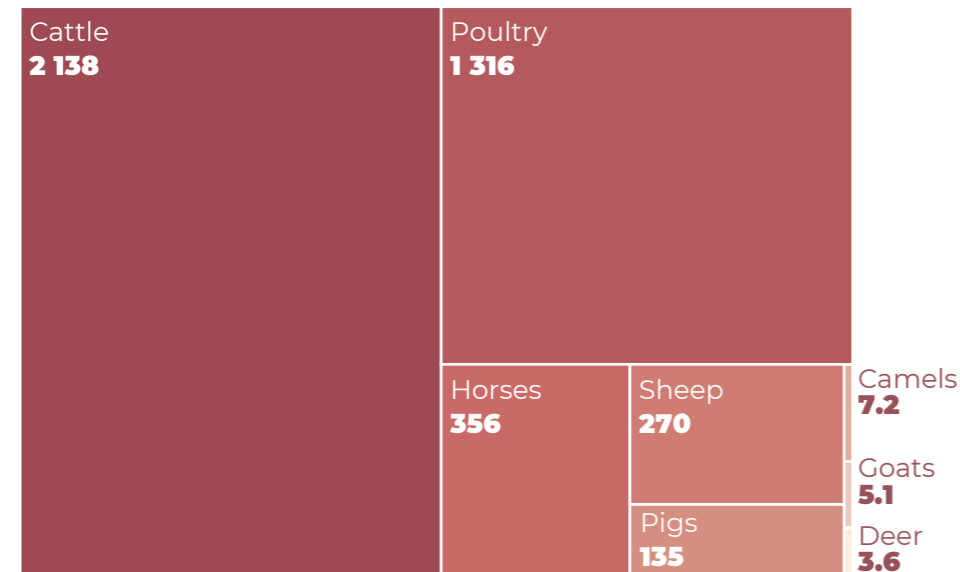


## Feed availability, on average per livestock unit, 100 kg of feed units

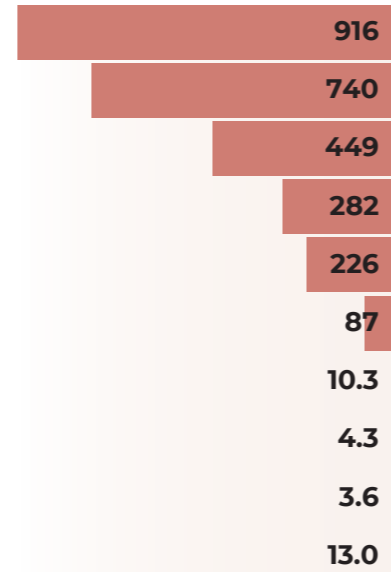
in agricultural enterprises as of 1.02.2023



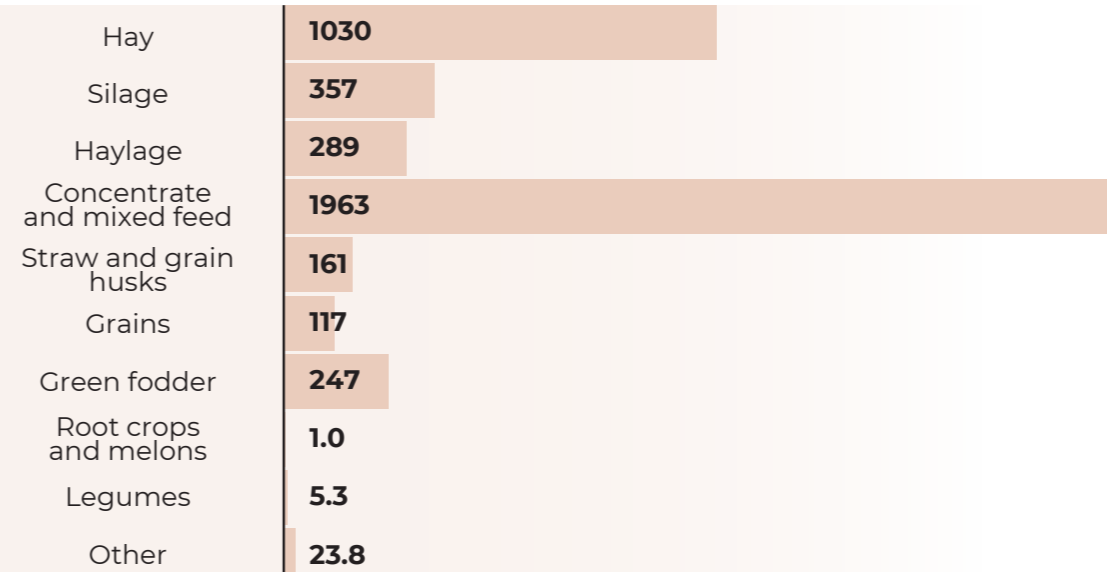
## Feed consumption in agricultural enterprises by types of livestock in 2022, thou. t of feed units



## Feed availability as of 1.01.2023, thou. t of feed units



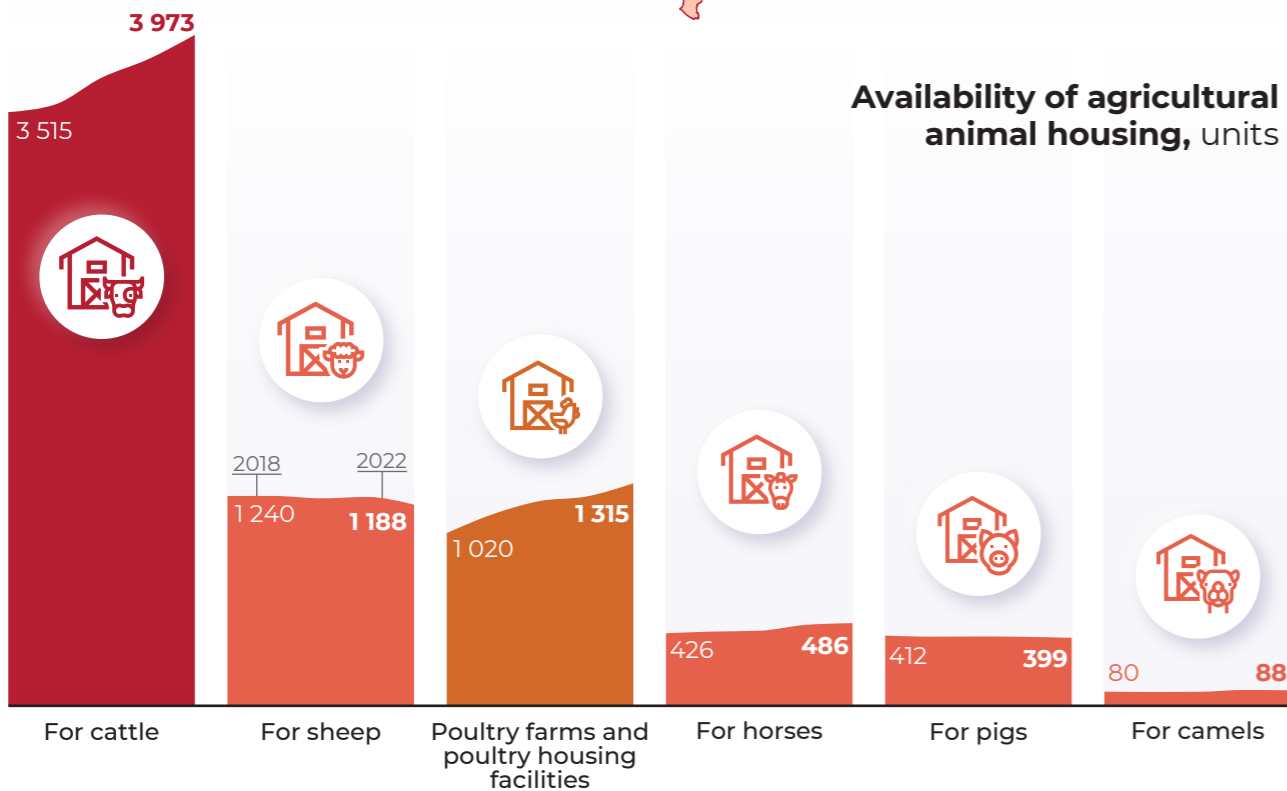
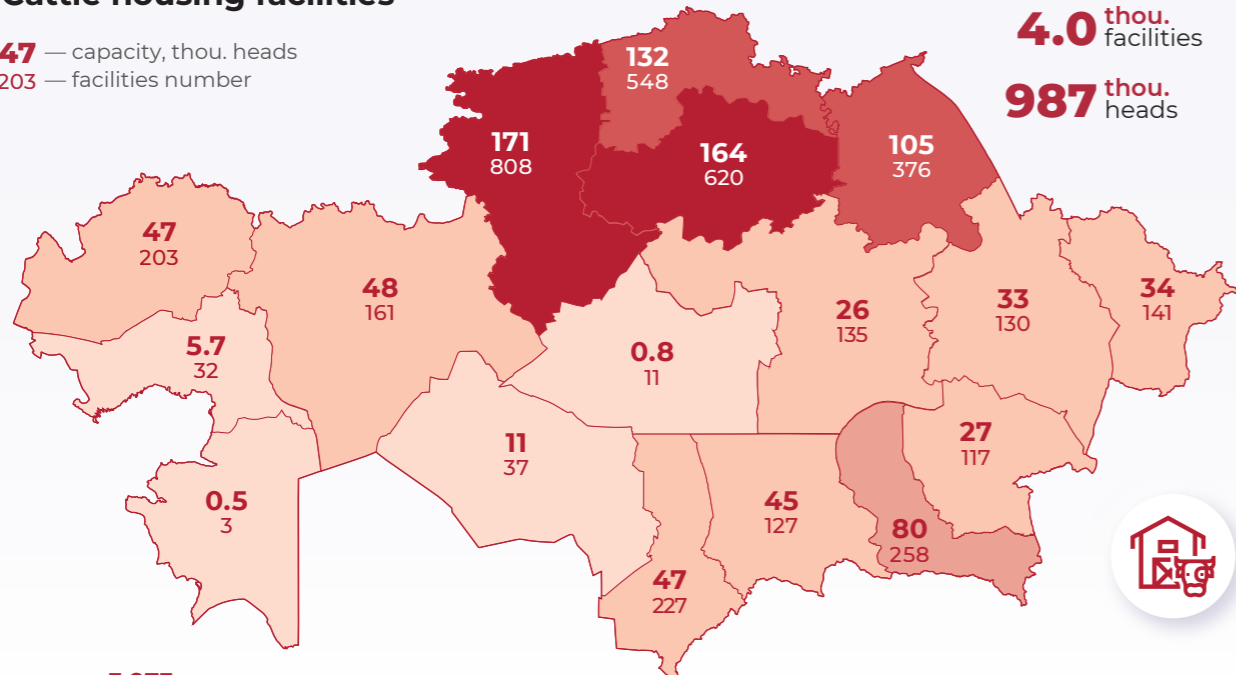
## Fodder consumption in 2022, thou. t of feed units





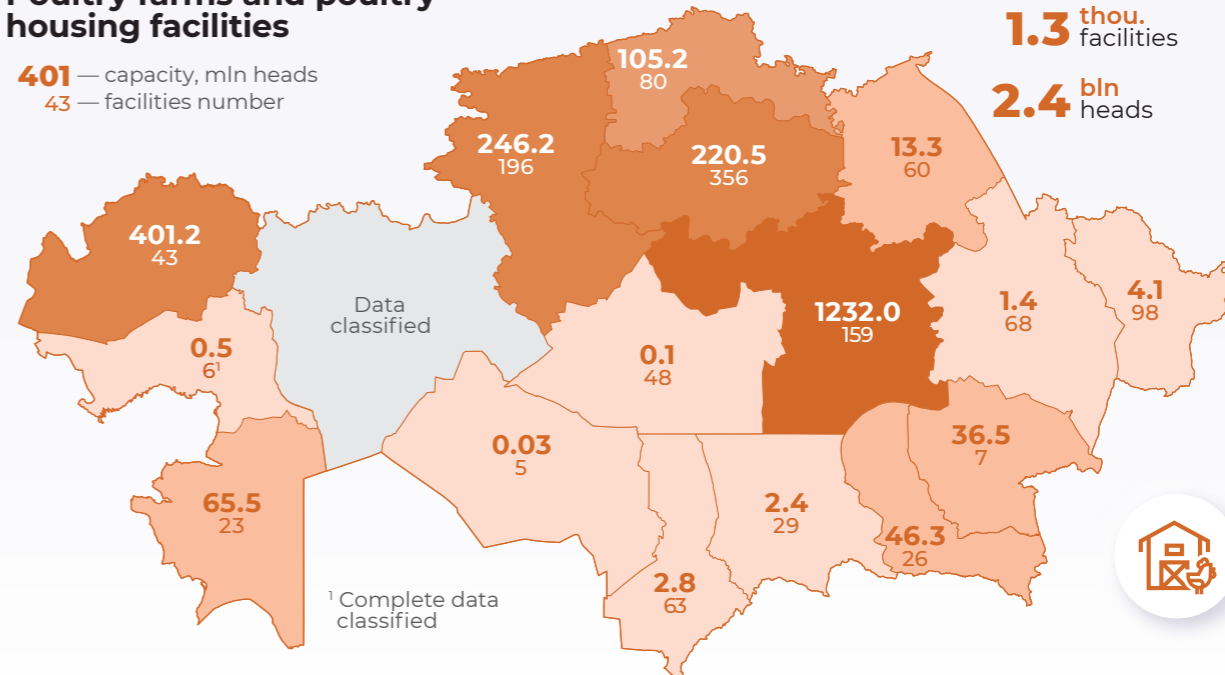
## Cattle housing facilities

47 — capacity, thou. heads  
203 — facilities number



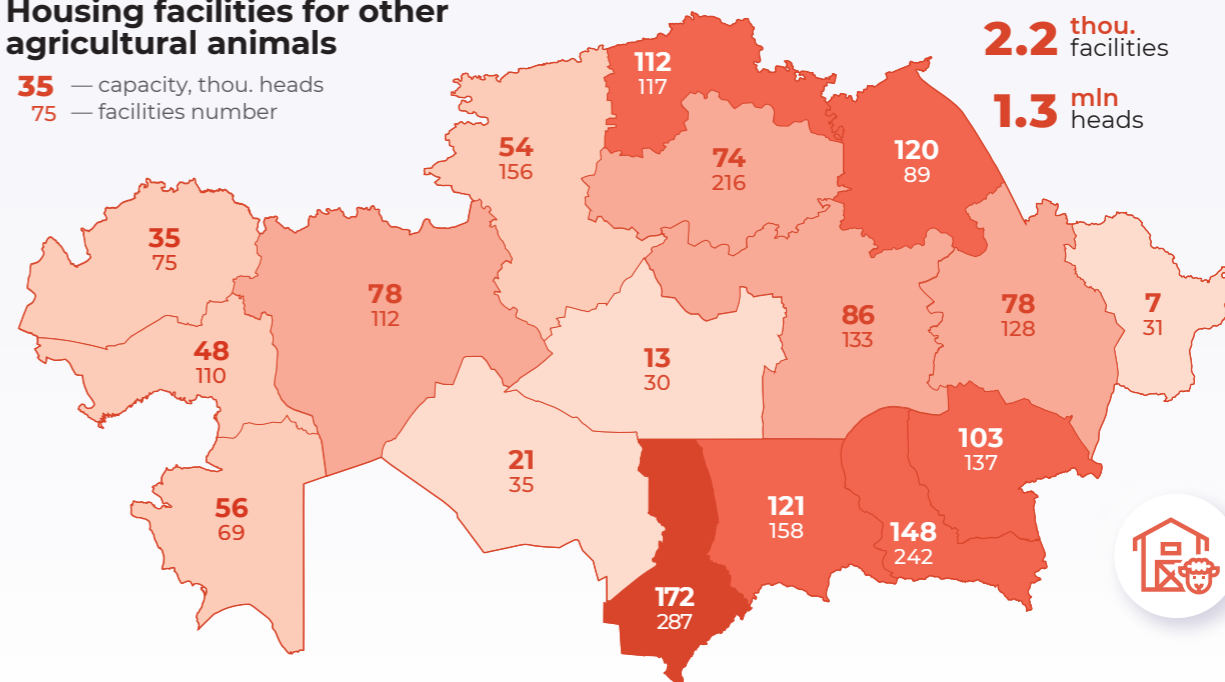
## Poultry farms and poultry housing facilities

401 — capacity, mln heads  
43 — facilities number



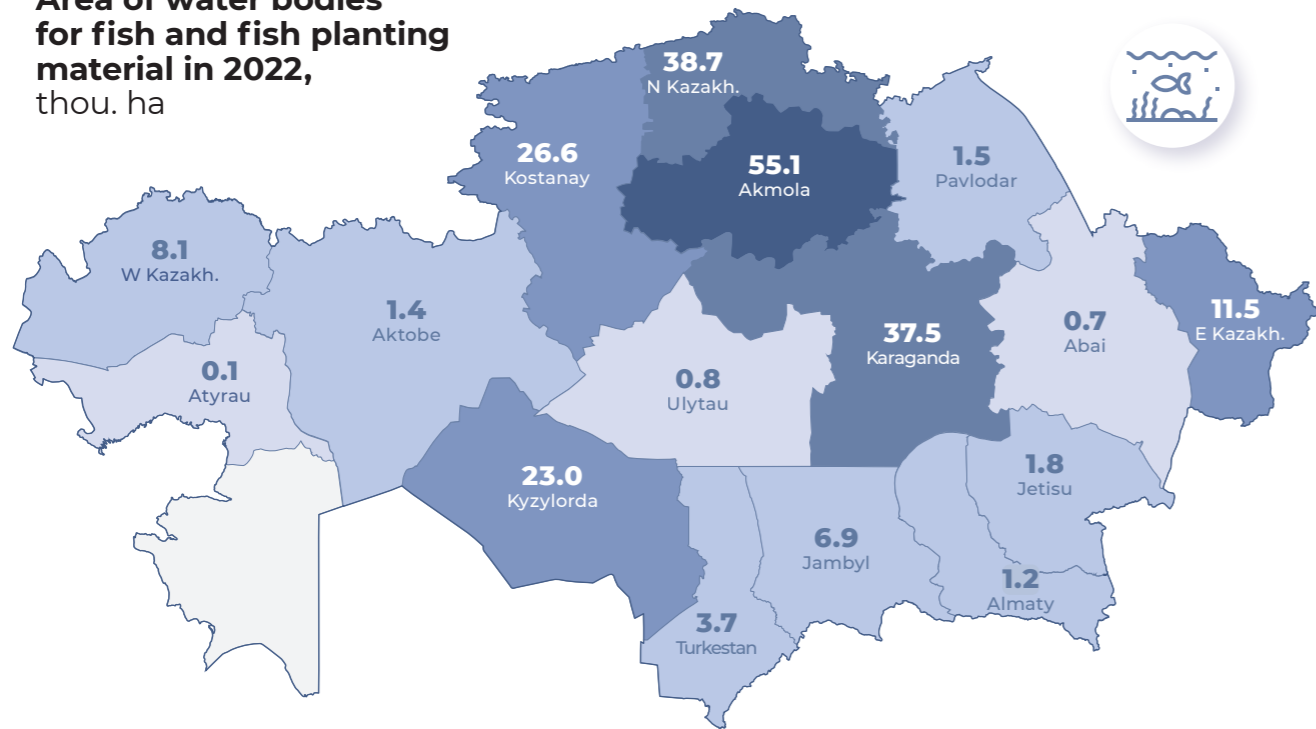
## Housing facilities for other agricultural animals

35 — capacity, thou. heads  
75 — facilities number

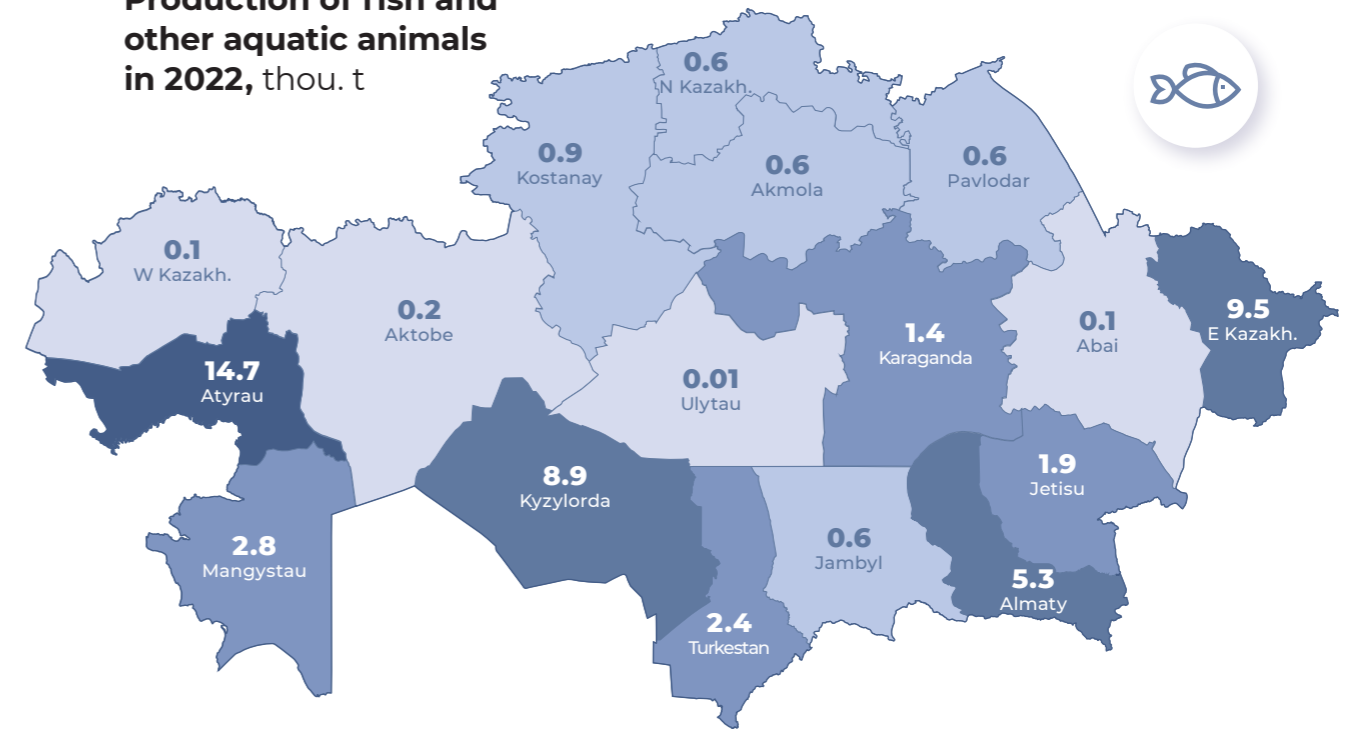




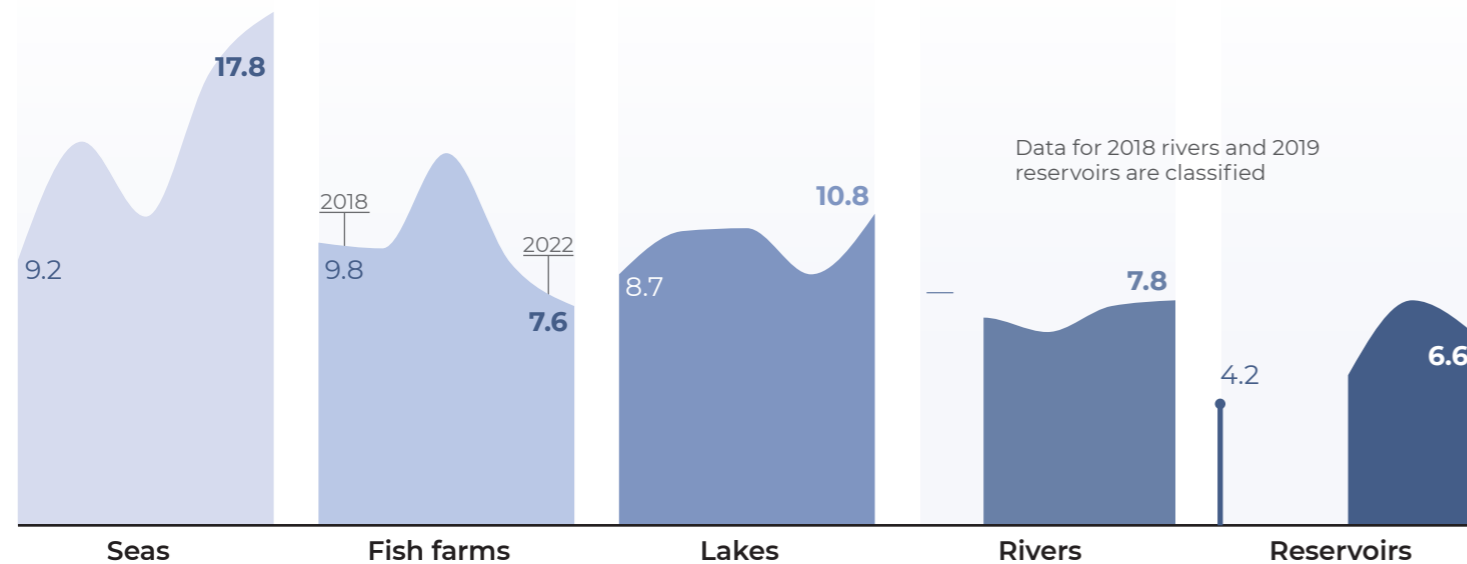
Area of water bodies for fish and fish planting material in 2022, thou. ha



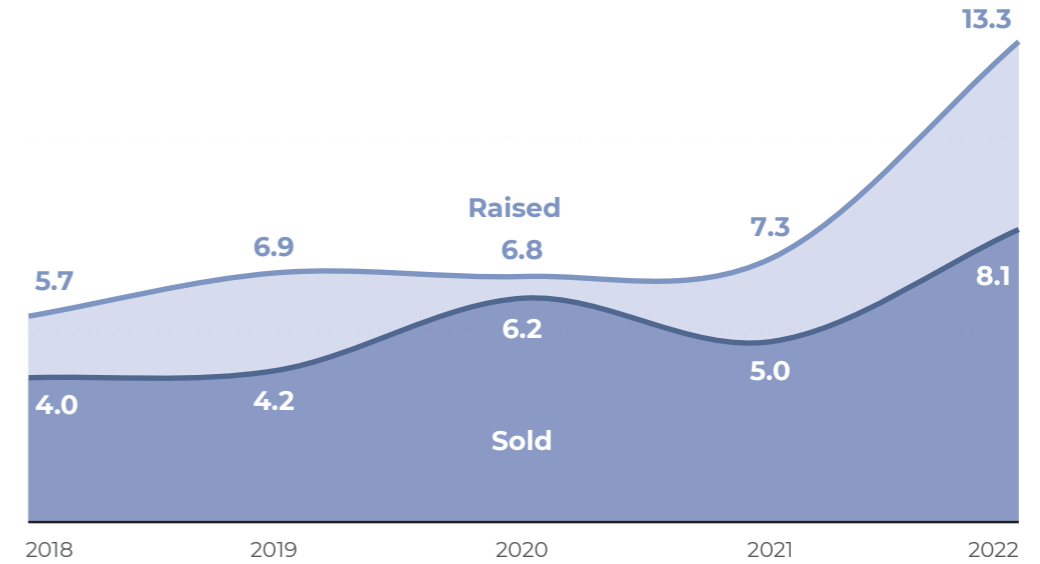
Production of fish and other aquatic animals in 2022, thou. t



Dynamics of fish and other aquatic animal production by types of water bodies, thou. t



Dynamics of farming and selling commercial fish and other aquatic animals, thou. t



# PROCESSING





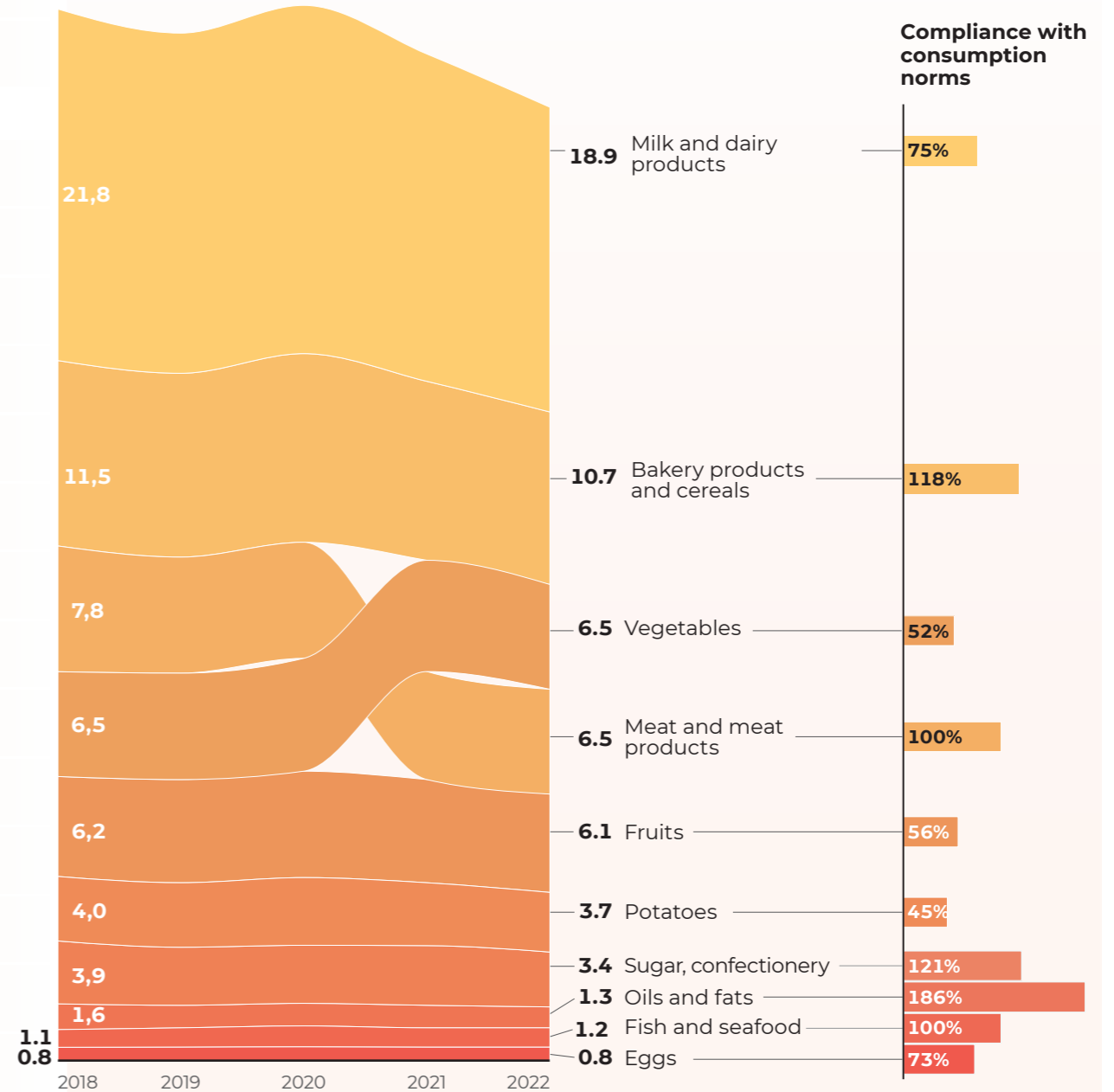
# PRODUCTION OF MAIN TYPES OF FOODSTUFFS IN KAZAKHSTAN

## FOOD PROCESSING

### Production and sales of basic food products in 2022

Product	Production (mln liters)	Sales (mln liters)	Self-sufficiency (%)
Non-alcoholic beverages	3 044	3 160	96%
Alcoholic beverages	850	919	93%
<b>thou. t</b>			
Flour, cereals, pasta	3 569	1 533	233%
Meat processing	1 352	1 546	88%
Dairy products (without milk)	937	1 067	88%
Vegetable oils, other fats	709	511	139%
Bakery, confectionery products.	659	742	89%
Food salt	336	104	325%
Sugar	282	555	51%
Chocolate and chocolate products	97	176	55%
Fruit and vegetable juices	86	130	66%
Vinegar, sauces, seasonings, yeast	74	119	62%
Fish and seafood	59	84	70%
Processed vegetables	21	89	24%
Tea and coffee	17	53	32%
Processed fruits and nuts	6	157	4%

### Consumption of basic food products on average per capita, kg/month

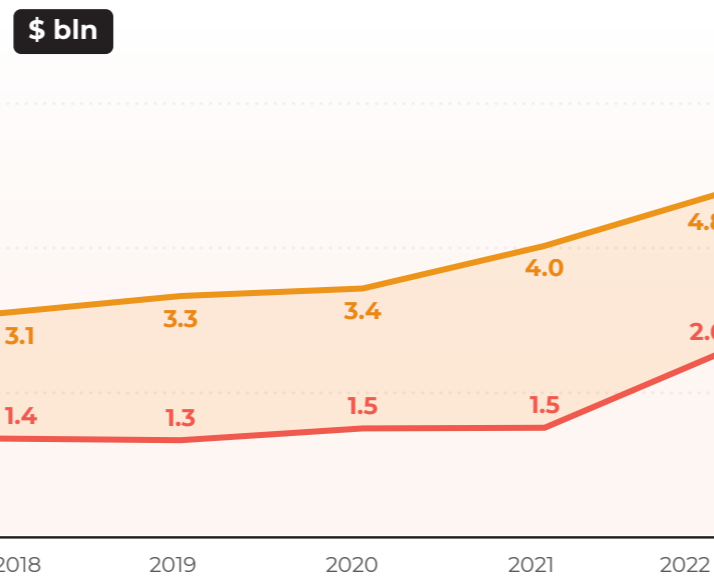
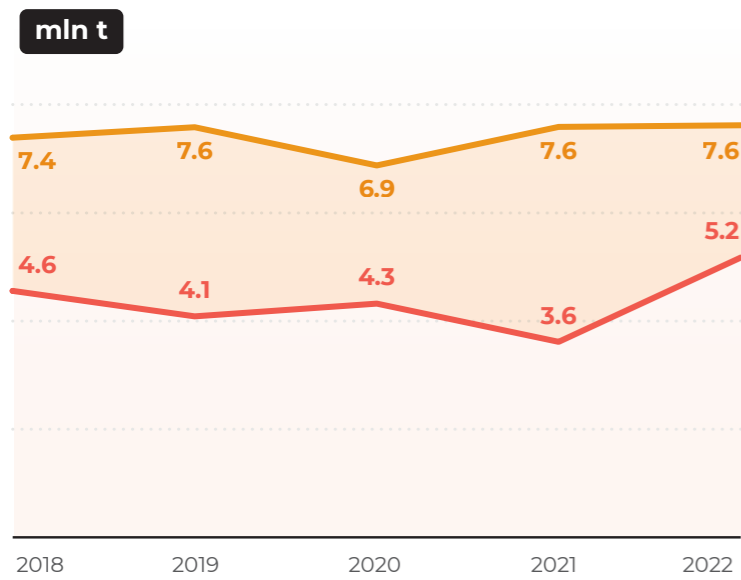




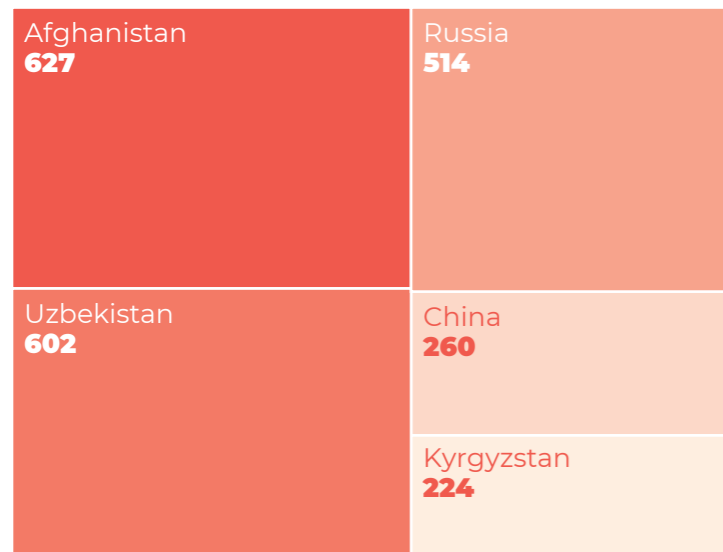
# PROCESSED PRODUCTS: TRADE

# FOOD PROCESSING

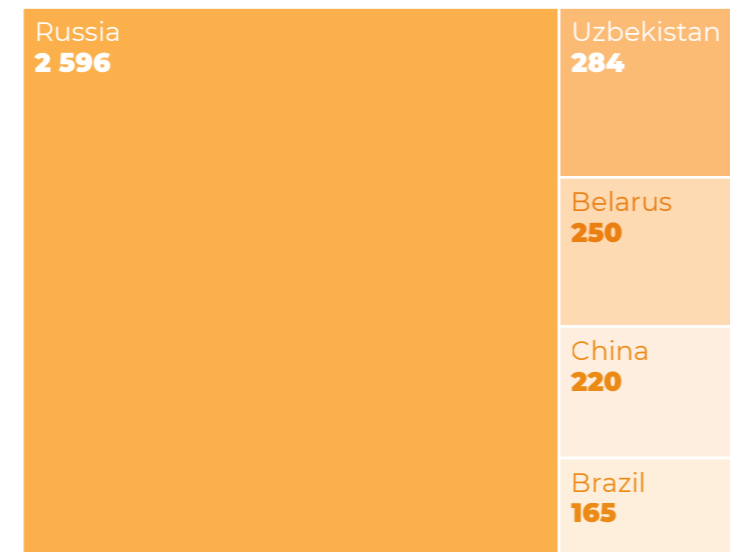
### Export and import of food products



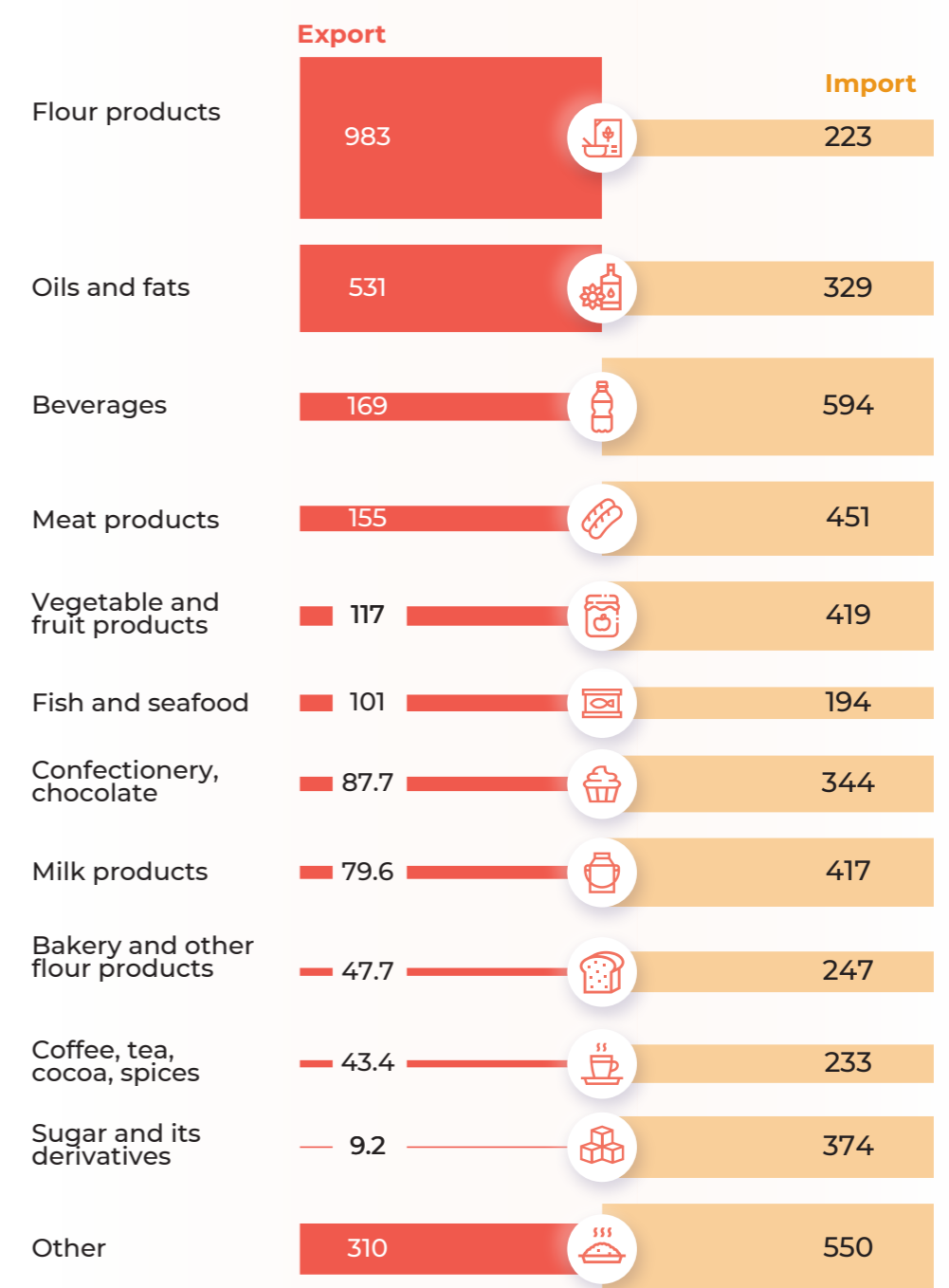
### Top 5 directions of export from Kazakhstan in 2022, US\$ mln



### Top 5 directions of import to Kazakhstan in 2022, US\$ mln



### Structure of exports and imports in 2022, \$ mln

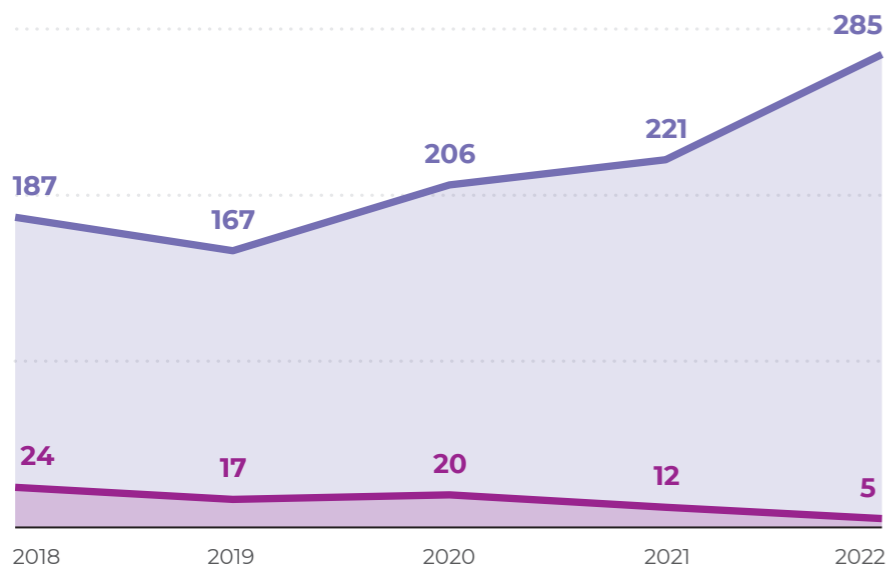


# INFRASTRUCTURE AND FINANCE

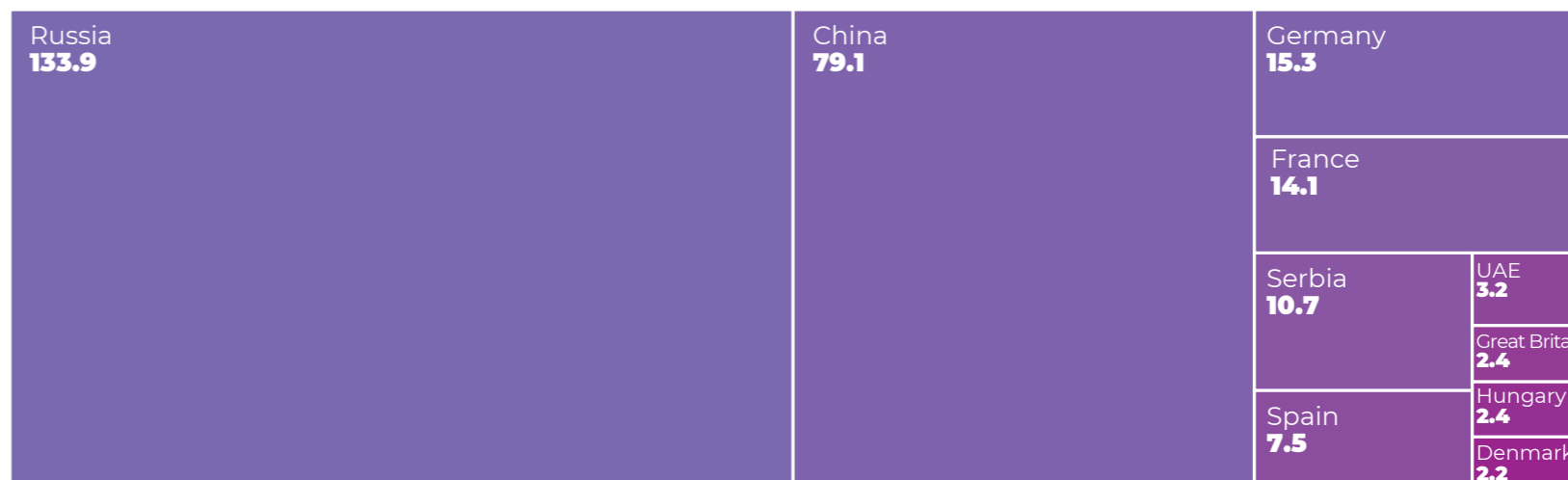




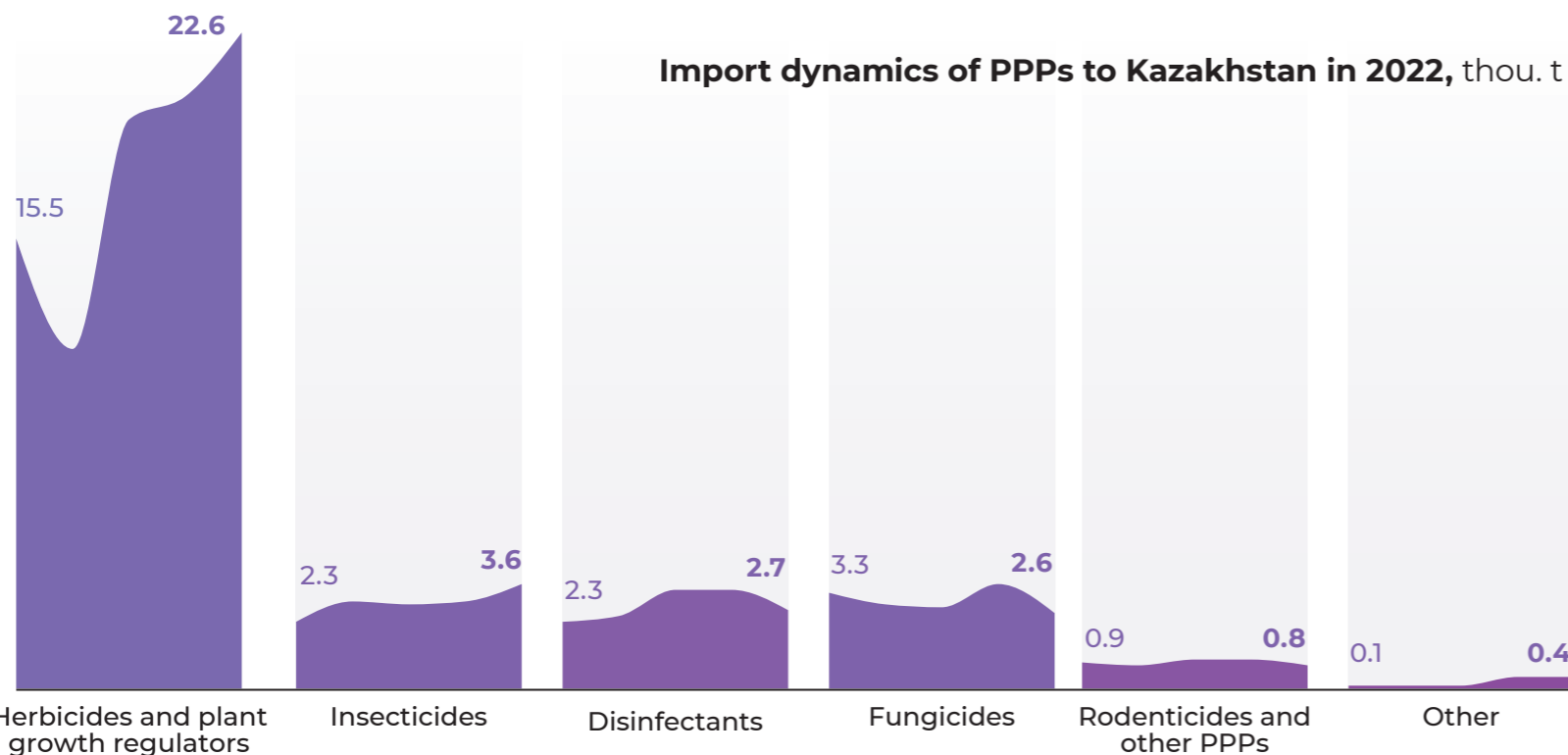
### Export and import of PPPs, US\$ mln



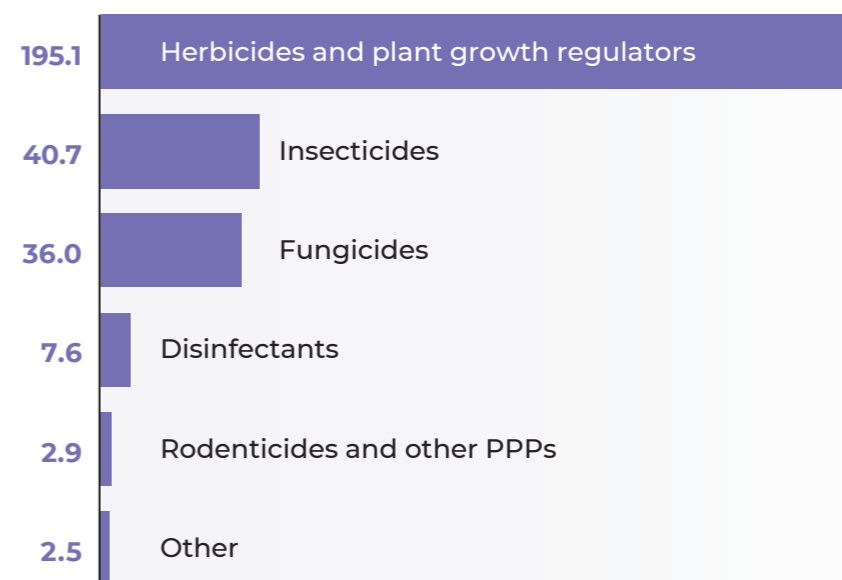
### TOP PPPs exporting countries to Kazakhstan in 2022, US\$ mln



### Import dynamics of PPPs to Kazakhstan in 2022, thou. t



### Import of PPPs to Kazakhstan in 2022, US\$ mln



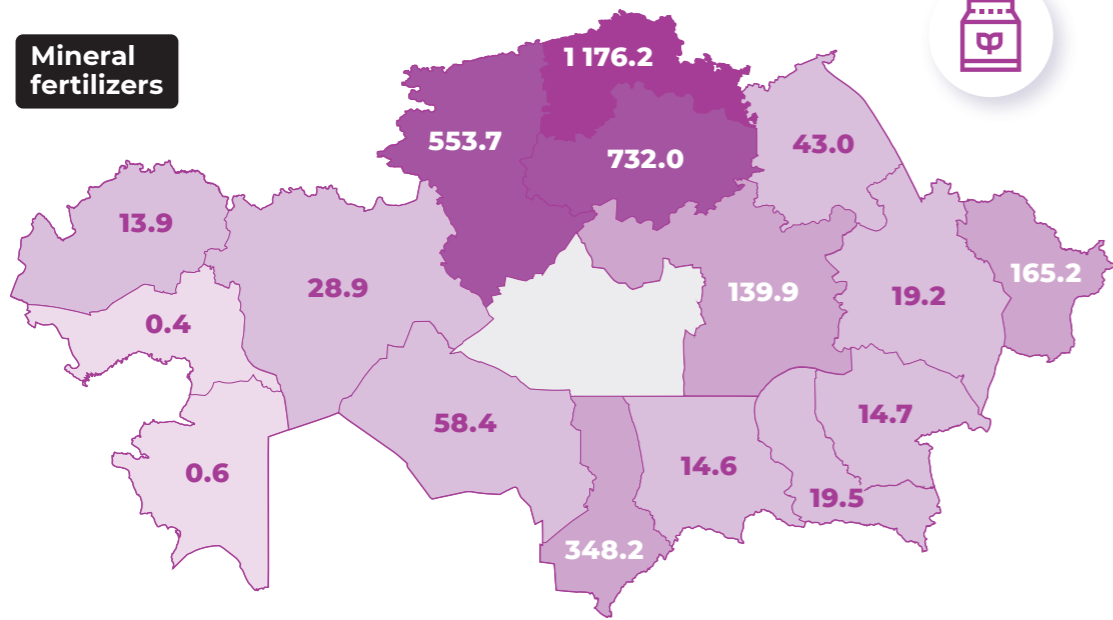




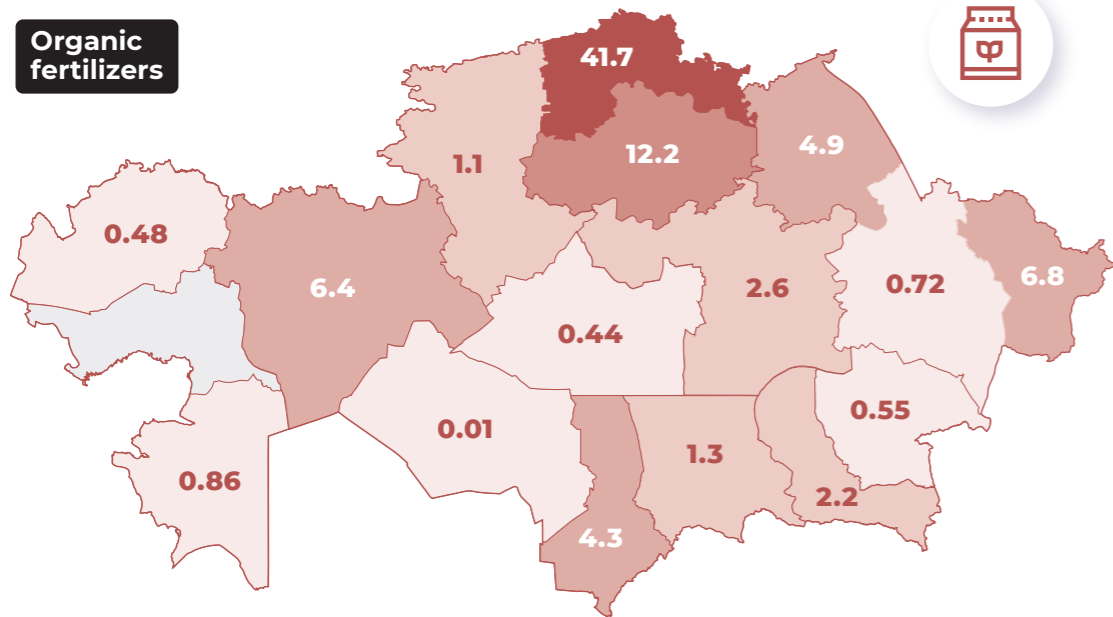
# FERTILISERS

### Fertilized area in 2022, thou. ha

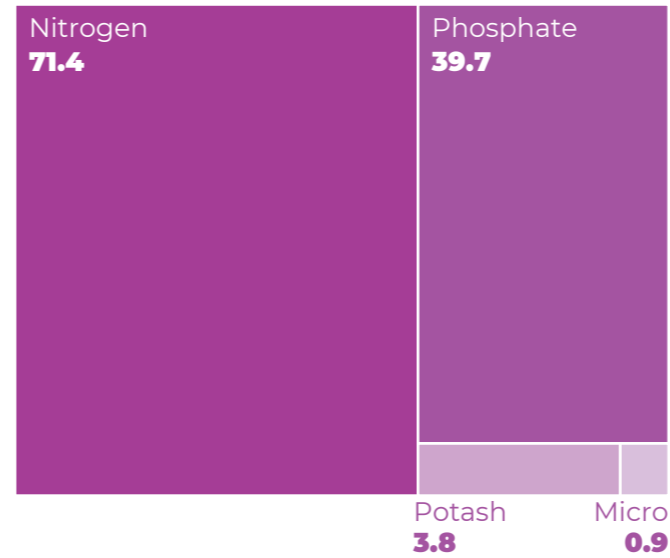
#### Mineral fertilizers



#### Organic fertilizers

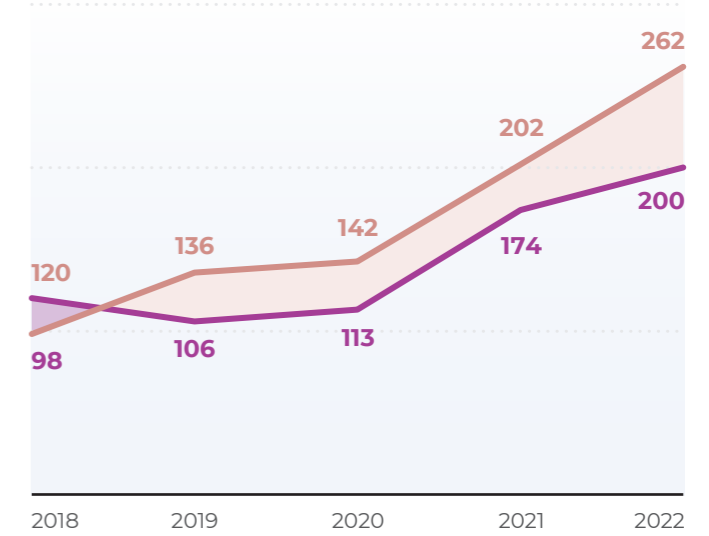


### Structure of applied mineral fertilizers in 2022, thou. t<sup>1</sup>



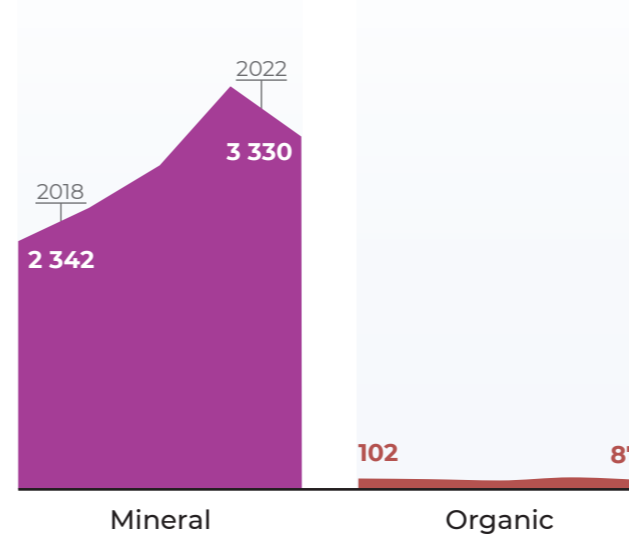
# INFRASTRUCTURE AND FINANCE

### Export and import of fertilizers, US\$ mln

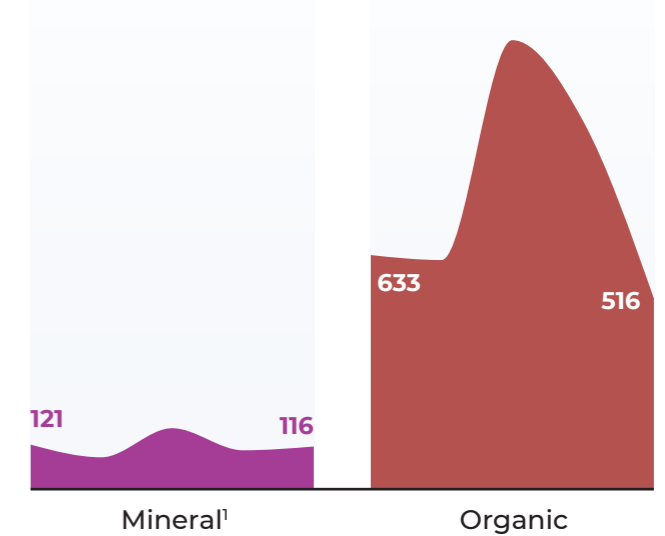


### Dynamics of fertilizer application by all categories of farms

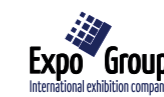
#### Application area, thou. ha



#### Application volume, thou. t



<sup>1</sup> In terms of 100% of nutrients



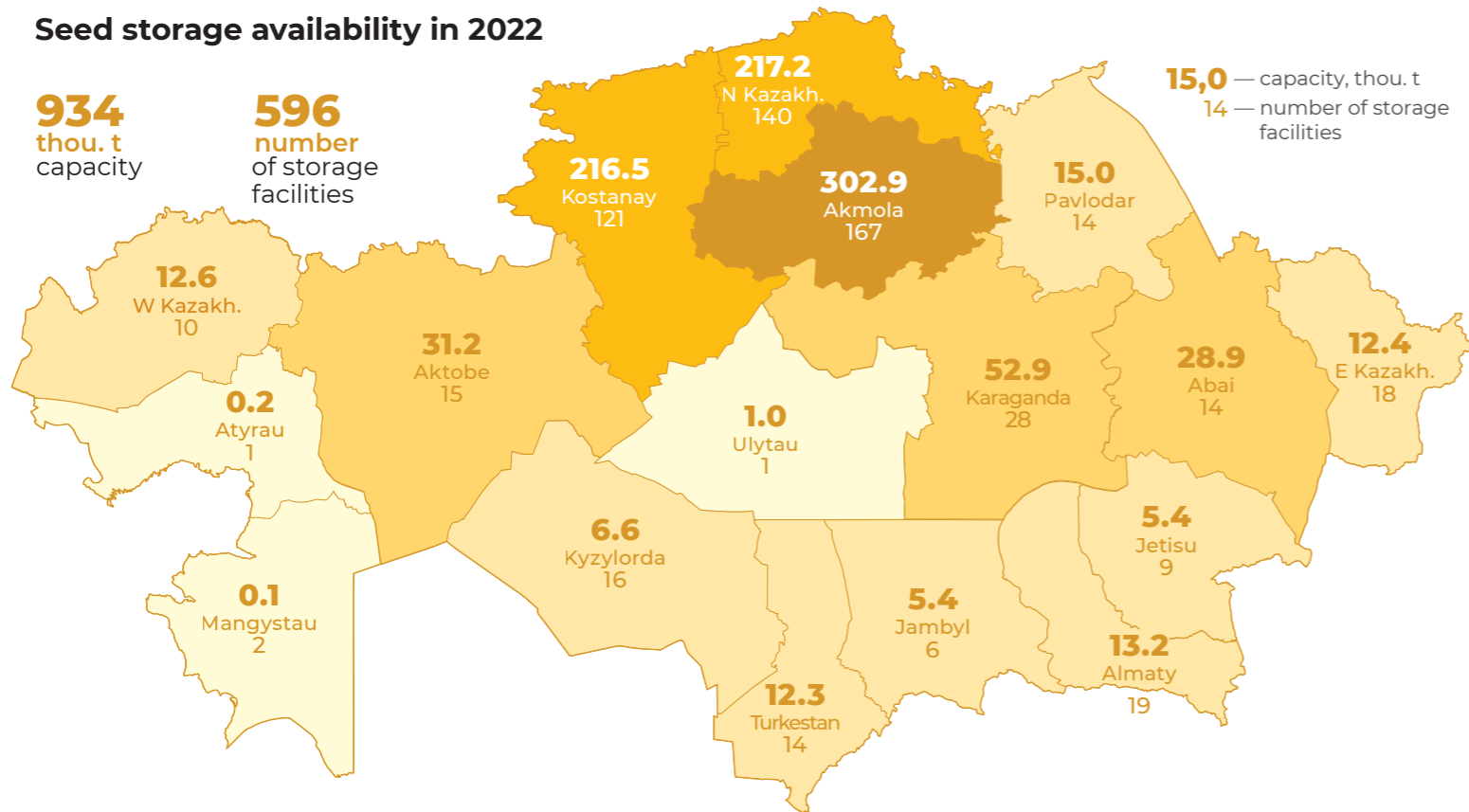


Seed storage availability in 2022

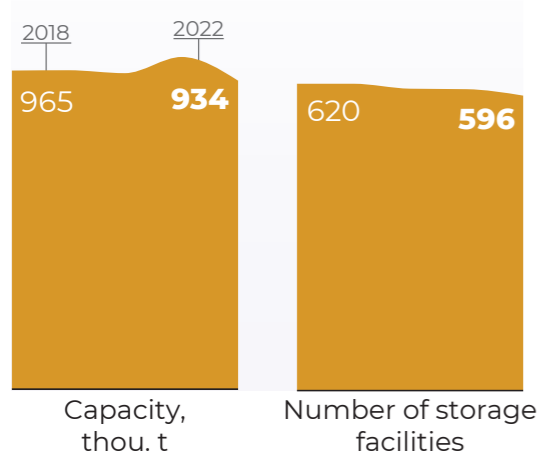
934 thou. t capacity

596 number of storage facilities

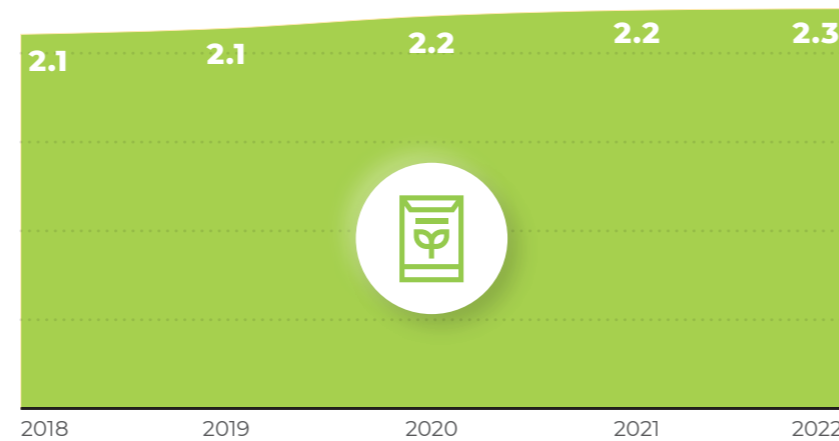
15,0 — capacity, thou. t  
14 — number of storage facilities



Seed storage availability



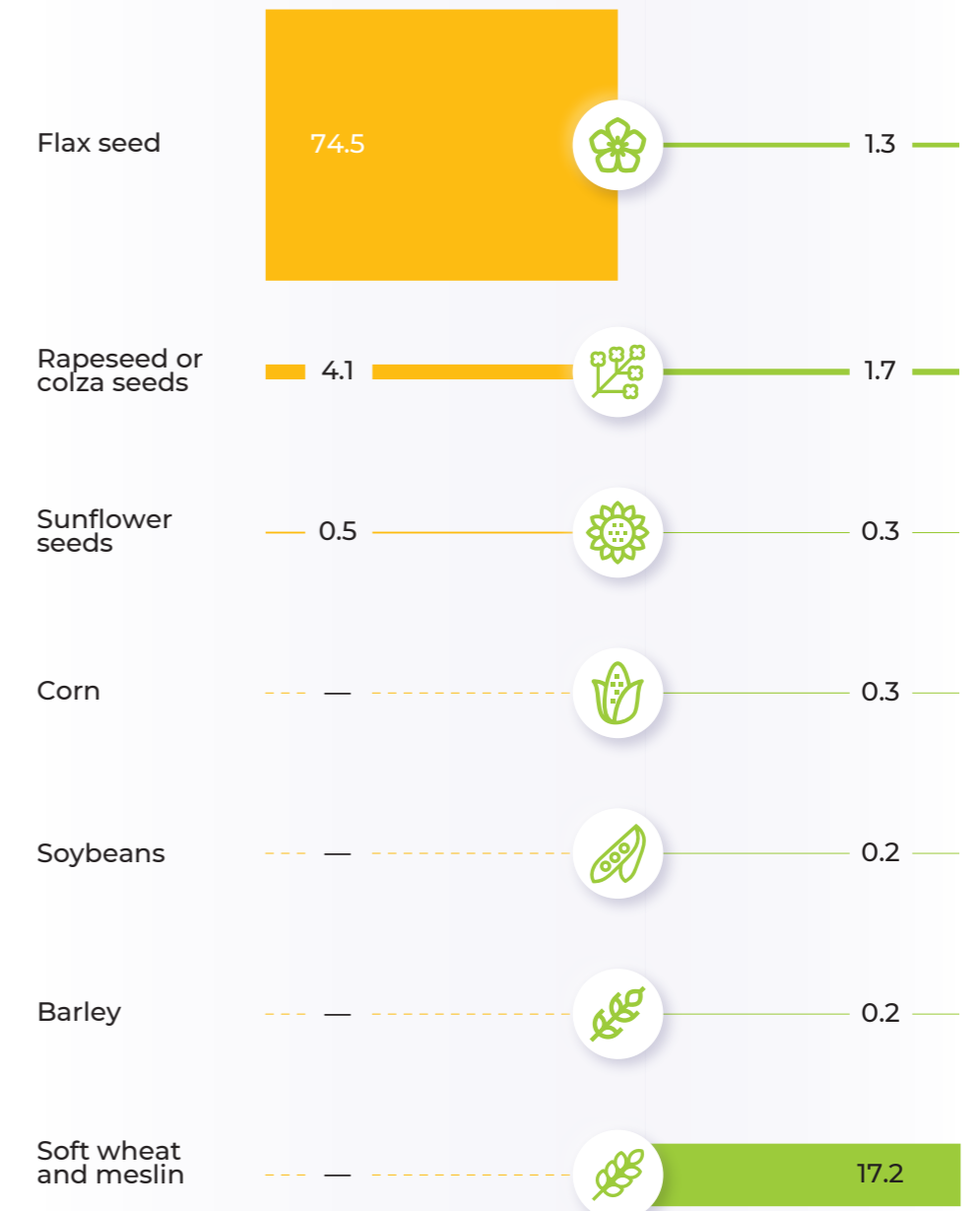
Use of grain for sowing, mln t



Structure of export and import of seeds for sowing in 2022, thou. t

Exports

Import

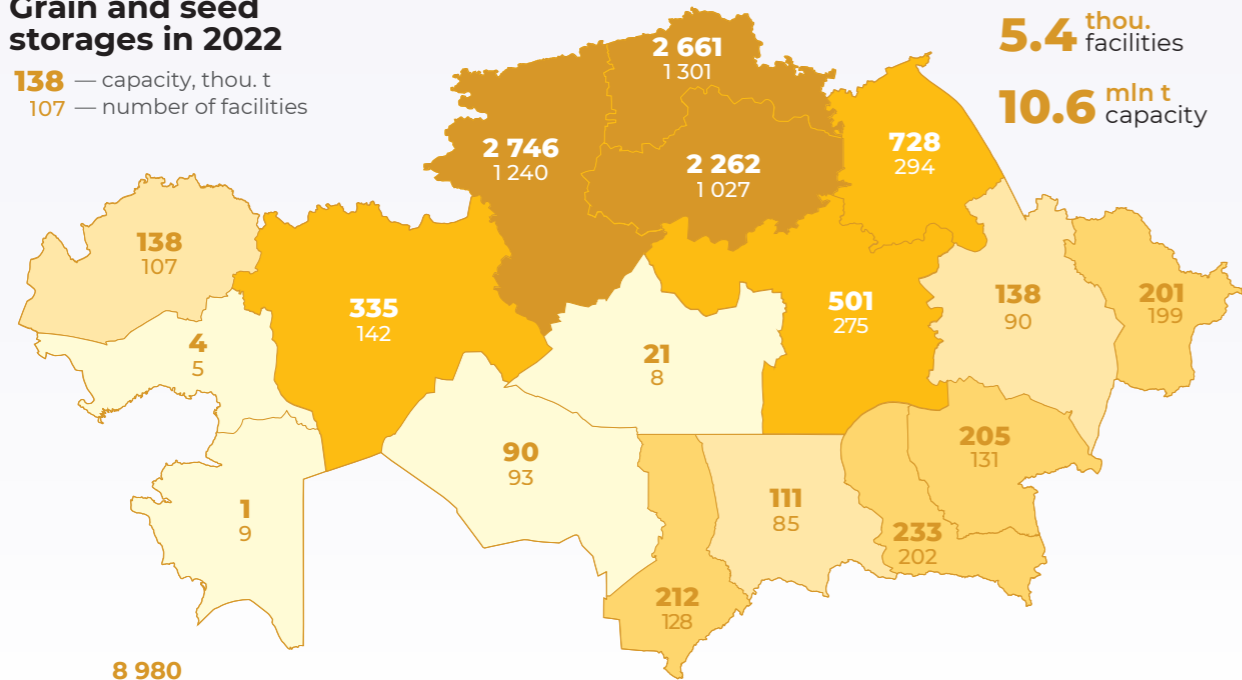




# WAREHOUSE INFRASTRUCTURE

## Grain and seed storages in 2022

138 — capacity, thou. t  
107 — number of facilities



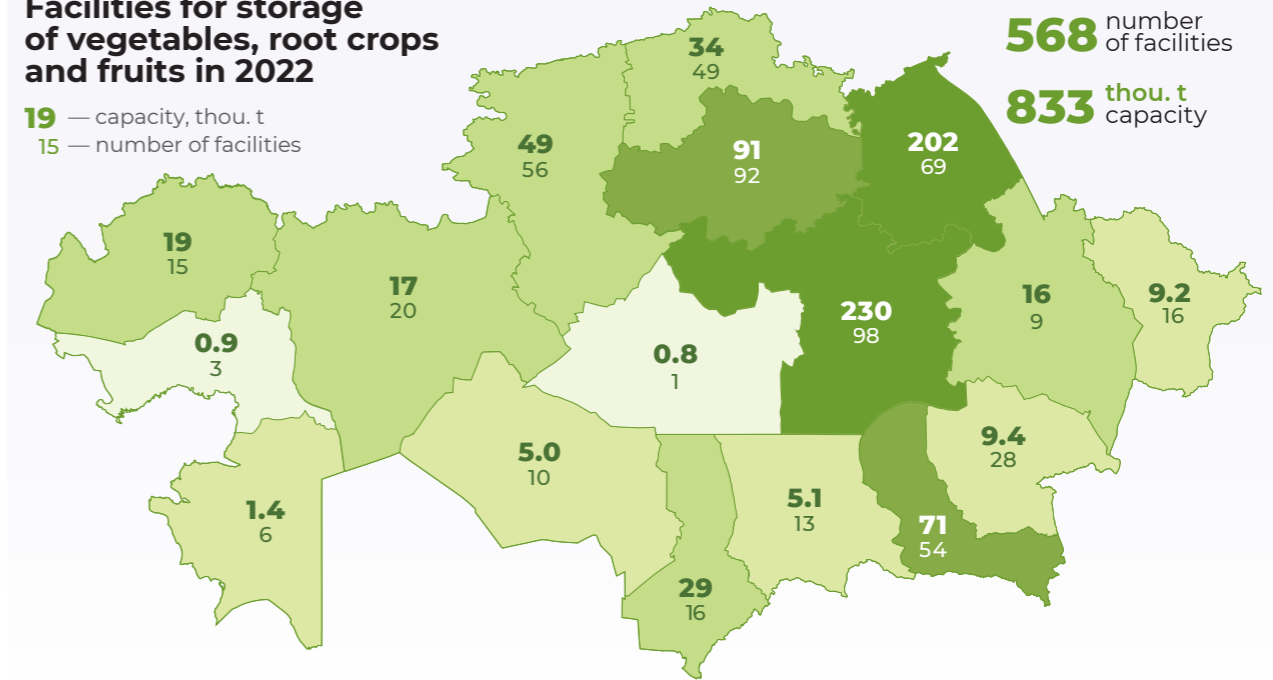
5.4 thou. facilities

10.6 mln t capacity

# INFRASTRUCTURE AND FINANCE

## Facilities for storage of vegetables, root crops and fruits in 2022

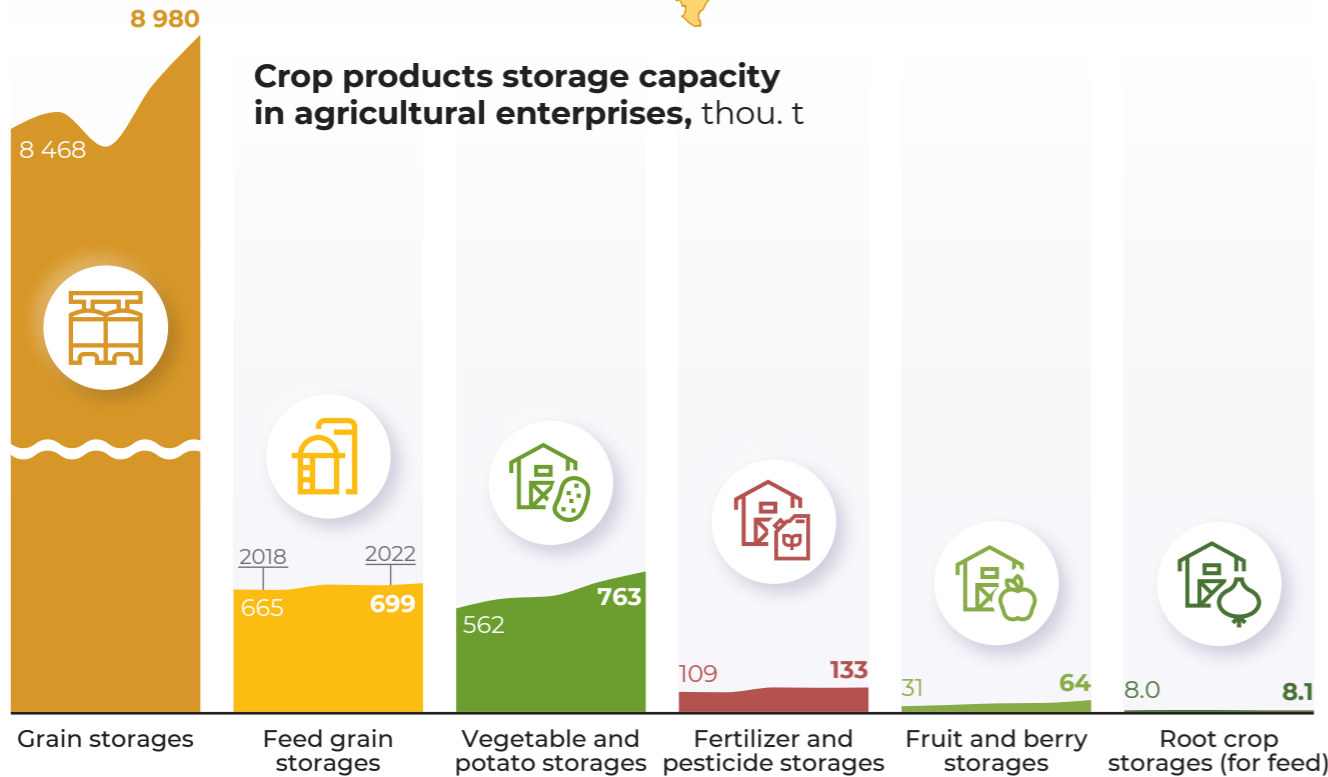
19 — capacity, thou. t  
15 — number of facilities



568 number of facilities

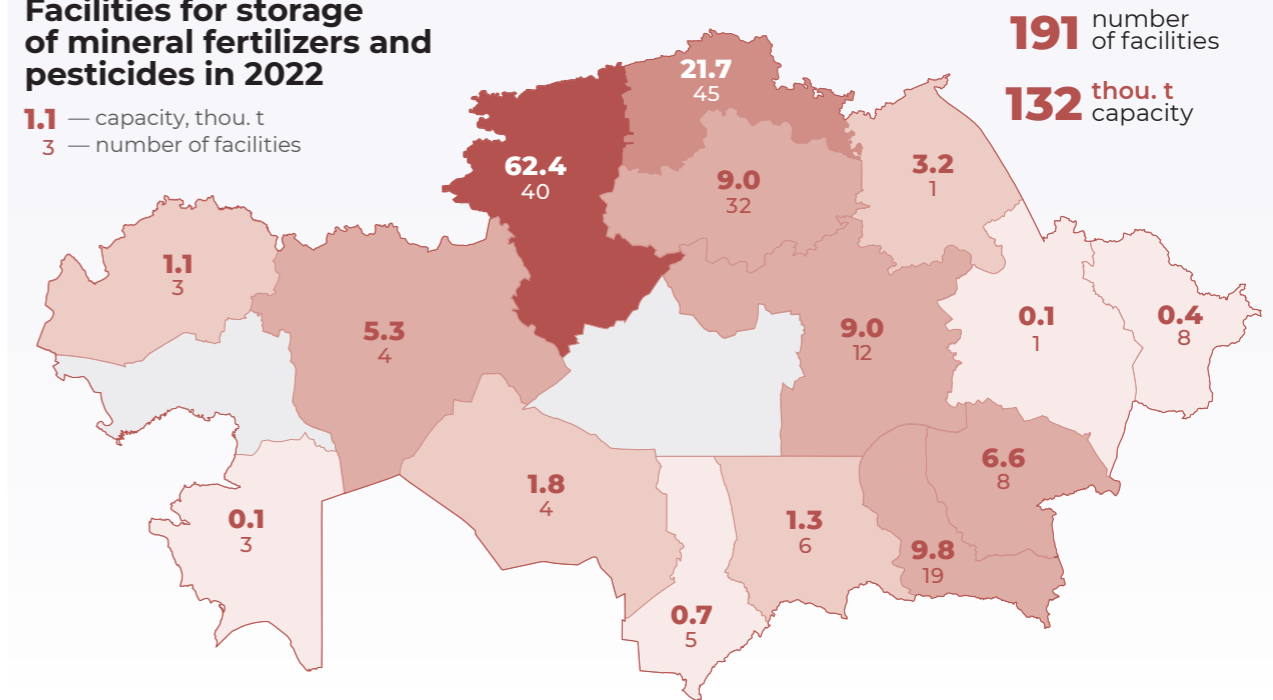
833 thou. t capacity

## Crop products storage capacity in agricultural enterprises, thou. t



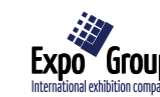
## Facilities for storage of mineral fertilizers and pesticides in 2022

1.1 — capacity, thou. t  
3 — number of facilities



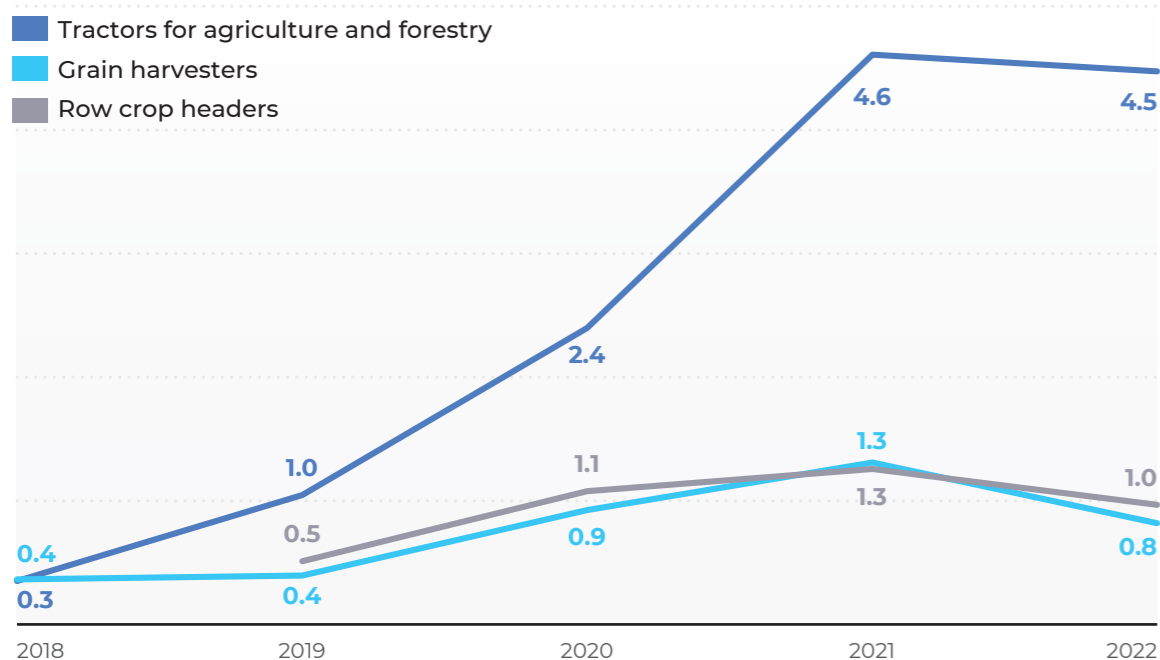
191 number of facilities

132 thou. t capacity

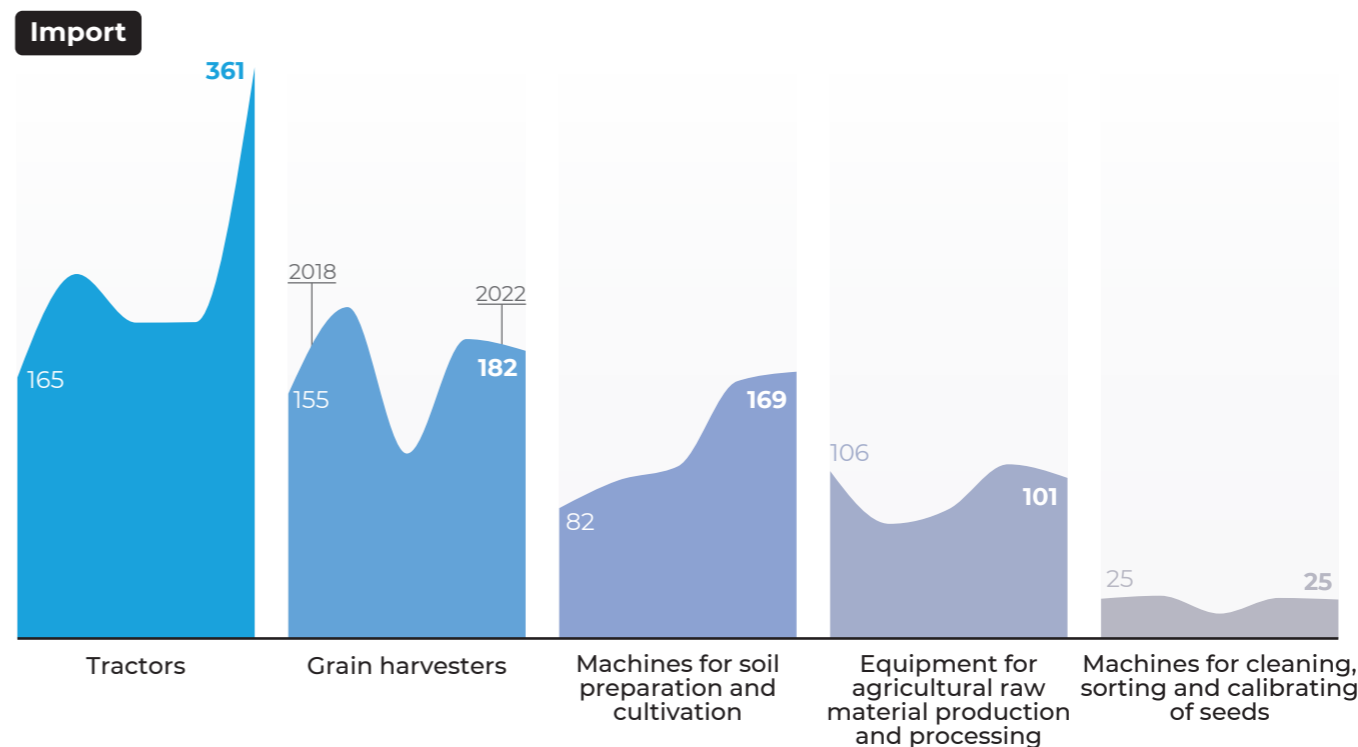




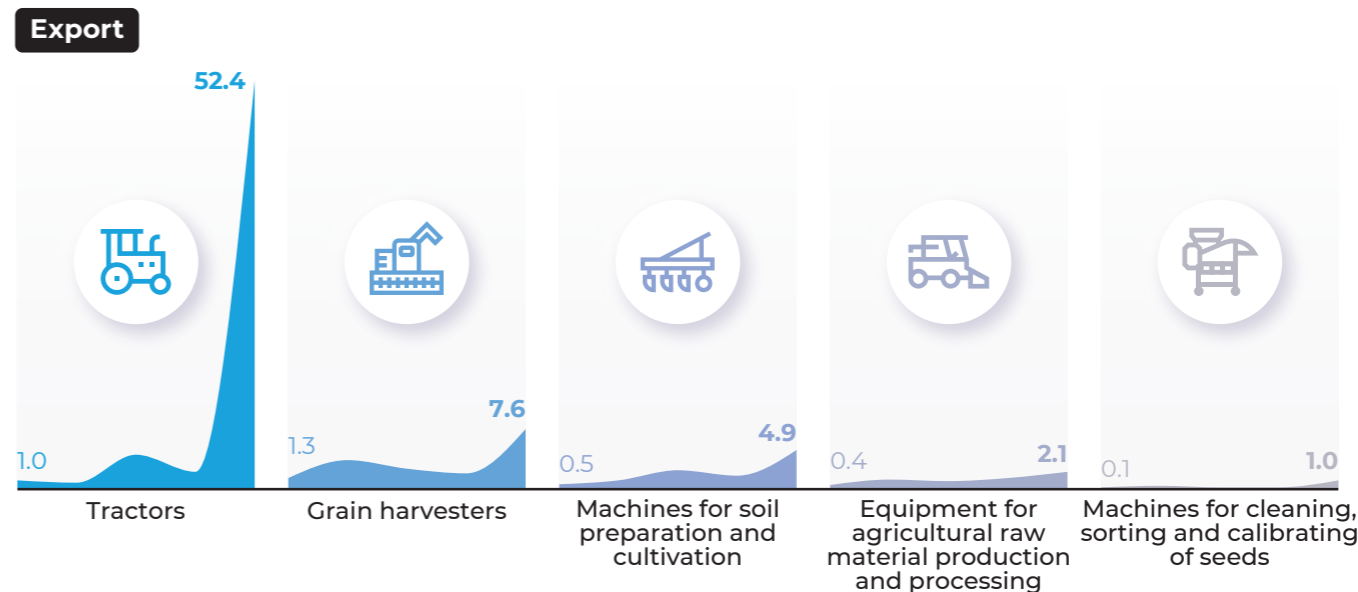
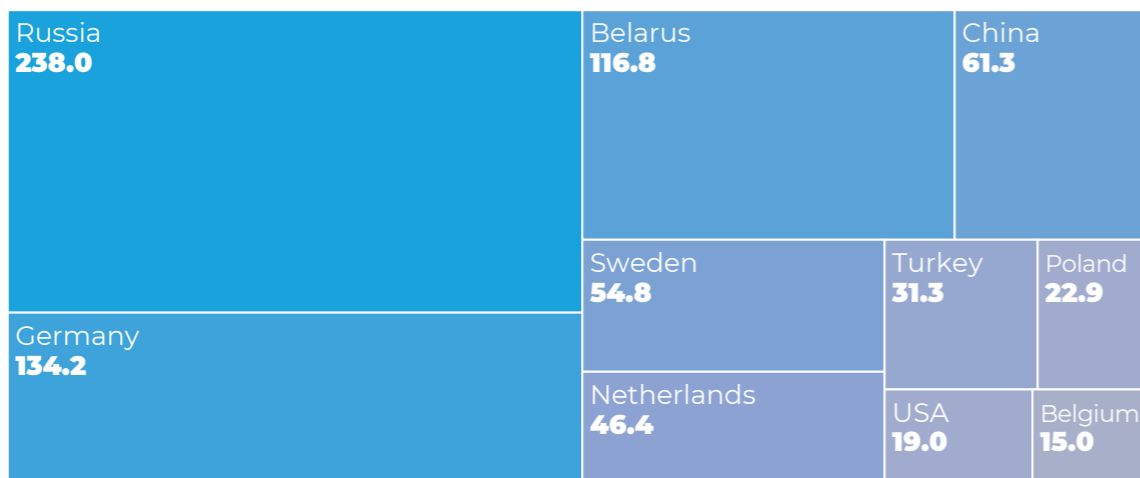
### Agricultural machinery production in Kazakhstan, thou. units



### Agricultural machinery export and import dynamics, US\$ mln



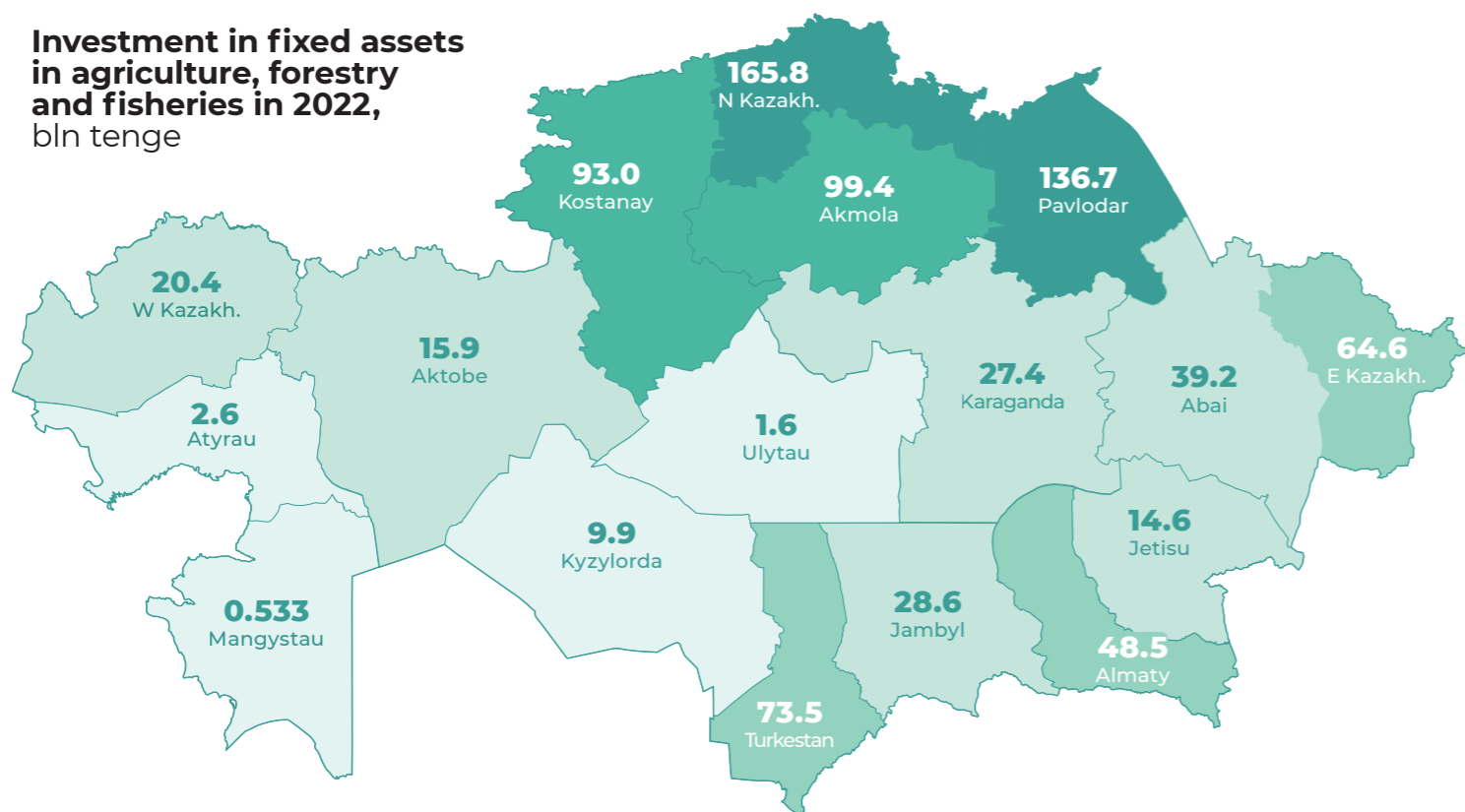
### Top 10 suppliers of ag machinery to Kazakhstan in 2022, US\$ mln



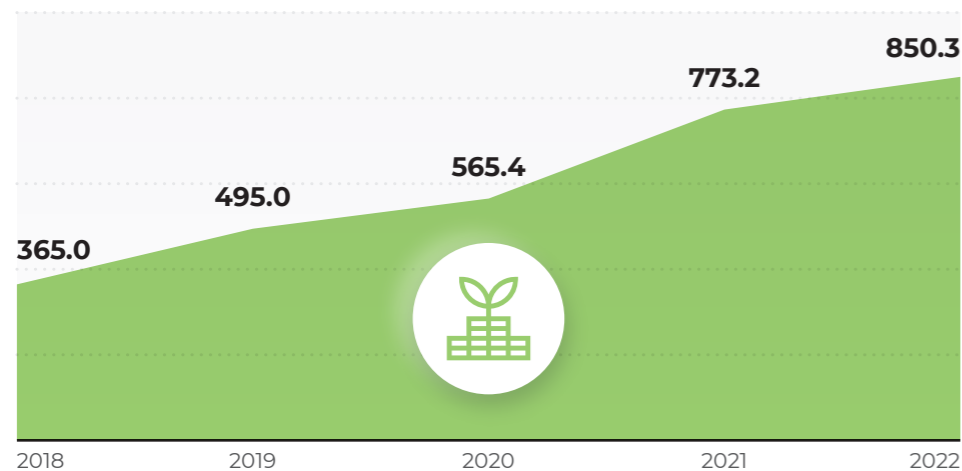


## INVESTMENTS IN AGRIBUSINESS

### Investment in fixed assets in agriculture, forestry and fisheries in 2022, bln tenge



### Investment dynamics in fixed assets in agriculture, forestry and fisheries, bln tenge



In 2022, the growth of nominal investment (unadjusted for inflation) reached 10% as compared to 2021.

The share of equity and bank loans in investment financing increased, while the percentage of budget funds decreased.

76% of the investment was used for the purchase of machinery and equipment.

## INFRASTRUCTURE AND FINANCE

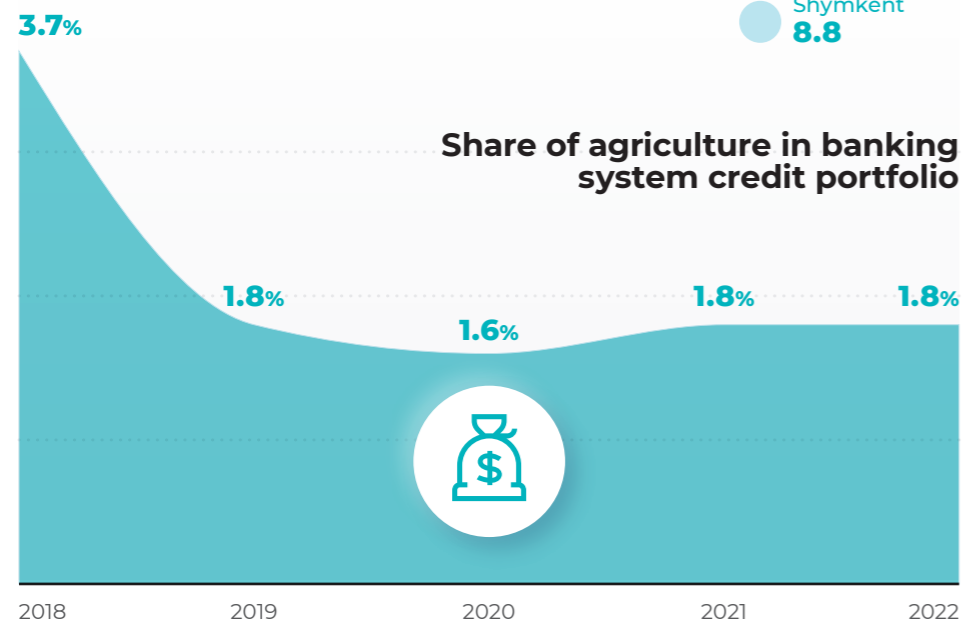
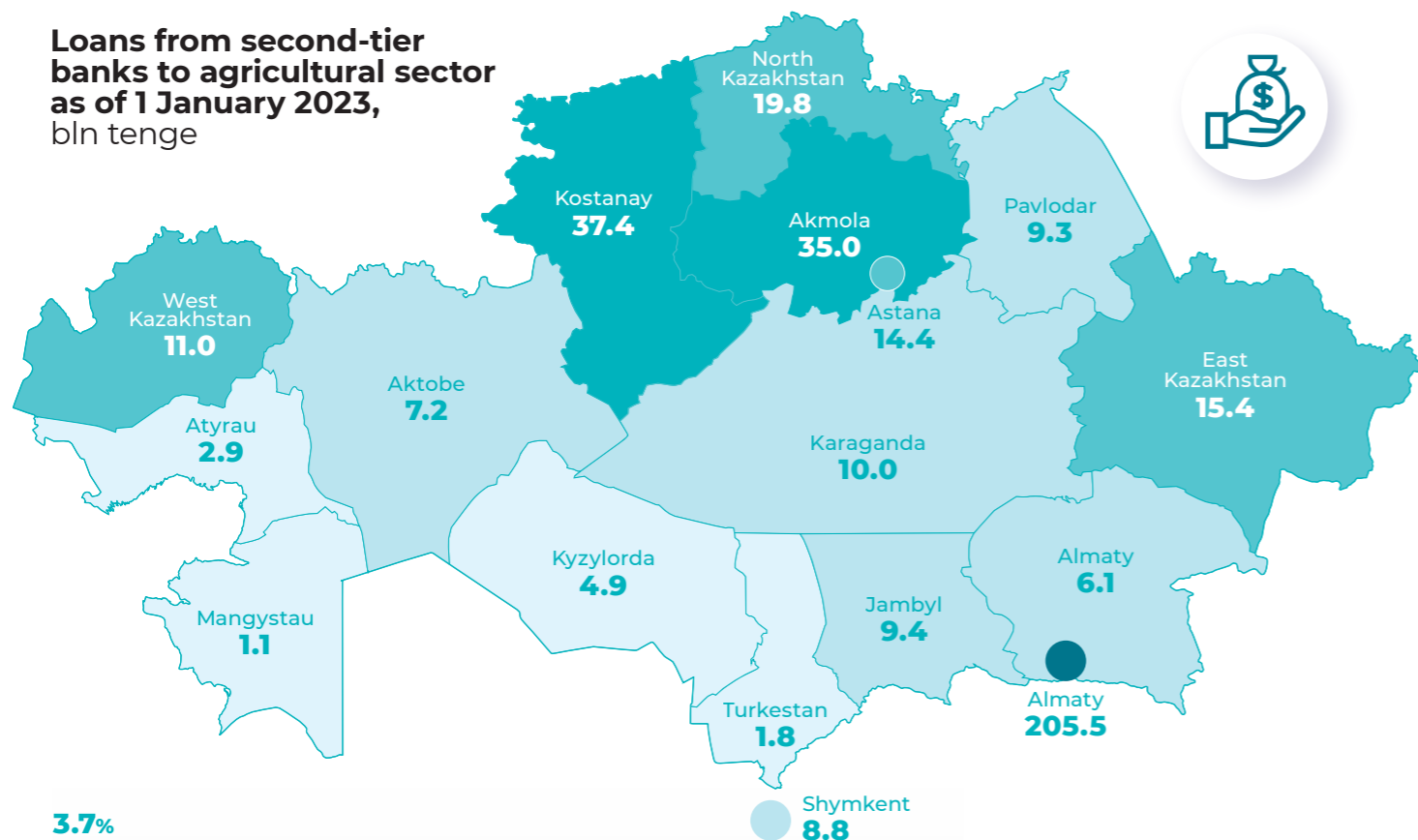
### Investment structure in 2022, bln tenge





# LENDING TO THE AGRIBUSINESS SECTOR

### Loans from second-tier banks to agricultural sector as of 1 January 2023, bln tenge



### Share of agriculture in banking system credit portfolio



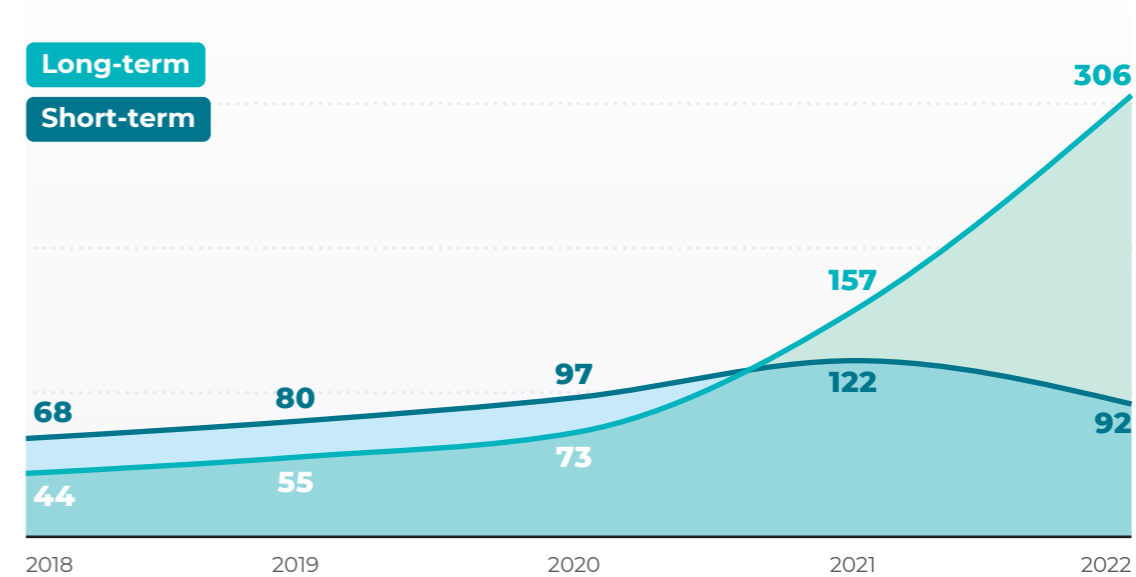
While the volume of credits to the agricultural sector increased, its share in the total loan portfolio remained at 1.8%.

In 2022, the tendency towards an increase in the share of long-term loans and a decrease in short-term loans continued.

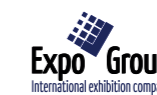
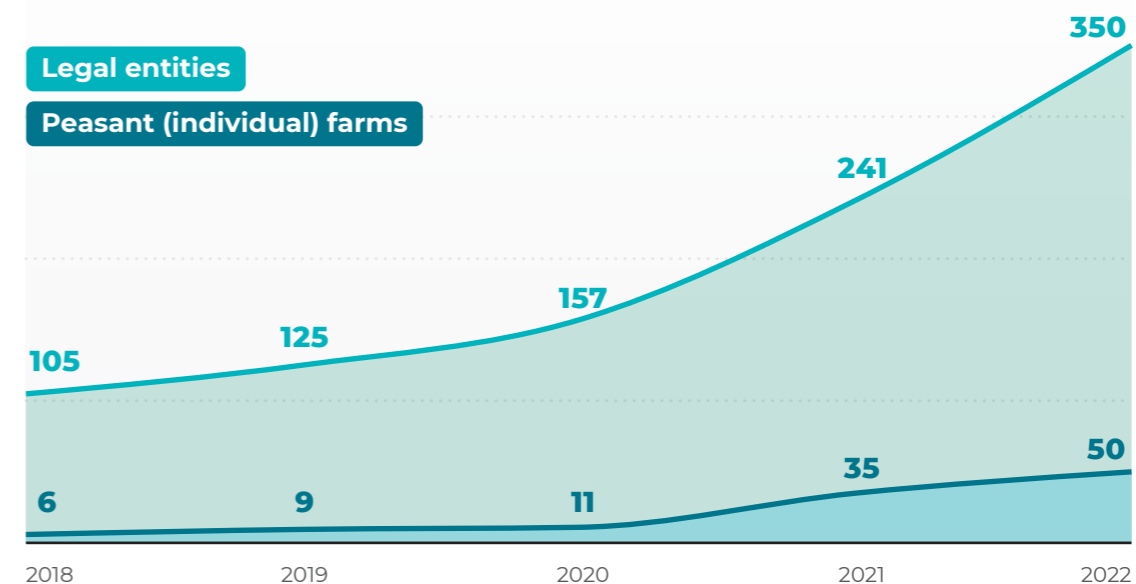
At the same time, 88% of all loans to agriculture were provided to agricultural enterprises.

# INFRASTRUCTURE AND FINANCE

### Loans issued by banks to agricultural sector, bln tenge



### Loans issued by banks to agricultural sector, bln tenge



## Report authors

### EIDala.kz

[reklama@eldala.kz](mailto:reklama@eldala.kz)



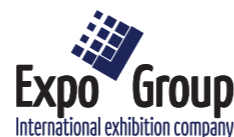
## Partners

### ExpoGroup

Kunaev str., 4, office A7.006  
Astana, Kazakhstan

**+7 7172 76 88 88**

[kazagroexpo.kz](http://kazagroexpo.kz)  
[kazfarm.kz](http://kazfarm.kz)  
[instagr.am/expogroupkaz](https://www.instagram.com/expogroupkaz)



### Agrocenter EuroChem-Kazakhstan

Al-Farabi avenue, 17/1  
BC Nurdy-Tau, block 5B,  
office 16

Almaty, Kazakhstan

**+7 727 356 56 57**

[agro.eurochem.ru](http://agro.eurochem.ru)  
[eurochemgroup.com](http://eurochemgroup.com)



### KAZSEEDS Limited

Kabanbai Batyr avenue, 15A,  
office A3-7, Esil district,  
Astana, Kazakhstan

**+8 727 334 40 00**

[kazseeds.kz](http://kazseeds.kz)



## Terms of use

### All exceptional property and non-property rights for this report pertain to Eldala Media LLC.

Non-compliance with this report terms of use will entail liability according to the legislation of Kazakhstan. Parts of this report may be reprinted with a direct hyperlink to EIDala.kz webpage, containing the report. The use and publishing of a complete digital version of this report on third-party websites is strictly prohibited.

## Disclaimer

### This report is designed exclusively to inform users.

We have made every effort to ensure the accuracy of the information contained in this report. Despite the fact that this information has been carefully prepared by experts, it can only be used to get a general idea of the subject discussed. Do not use the information contained in the report for professional advice on a particular issue or to pass professional judgement.

The data was collected and prepared for publication in 2023 based on the results of 2022 calendar year.