

Voluntary Report – Voluntary - Public Distribution

Date: April 24, 2026

Report Number: KZ2026-0006

Report Name: Kazakhstan Announces Second Stage of 2026 Meat and Poultry Tariff Rate Quotas

Country: Kazakhstan - Republic of

Post: Astana(Nur-Sultan)

Report Category: Agricultural Situation, Livestock and Products, Poultry and Products, Trade Policy Monitoring

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Report Highlights:

On April 1, 2026, the Ministry of Trade and Integration announced the second stage of 2026 meat and poultry quotas by HS code for importers. The second stage approved the distribution of 8,505 metric tons (MT) of beef and 94,500 MT of poultry. The 2026 TRQ volumes and rates remain unchanged from those announced in 2025.

Background

Beginning in 2010, tariff rate quotas (TRQs) were introduced for Belarus, Kazakhstan, and Russia by the Eurasian Economic Commission's (EEC) Decision No. 130 dated November 27, 2009. Since then, the EEC has approved TRQ volumes for beef, poultry, and pork products for Eurasian Economic Union (EAEU) members. As an EAEU member, Kazakhstan then approves specific volumes to importers who are authorized to bring in the product under the [preferential customs rate](#) of 15 percent of customs value for beef and 25 percent (but not less than 0.20 euros/kg/\$0.24/lb.) for poultry. Any beef imported outside the quota is assessed a duty of 50 percent of the customs value, but not less than 1 euro/kg (~\$1.18/lb.). Any poultry imported outside of the quota is assessed a duty rate of 80 percent of the customs value, but not less than 0.7 euros/kg (~\$0.82/lb.). Beef and poultry products are still under TRQ regimes, while pork quotas were cancelled in 2016.

On October 7, 2025, the EEC issued [Decision No. 89](#), "On Establishment of Tariff-Rate Quotas for Import of Certain Agricultural Goods into the Customs Territory of the Eurasian Economic Union (EAEU) in 2026" and "Volumes of Tariff-Rate Quotas for Import of these Goods in the Territories of the Eurasian Economic Union Member states." The decision established TRQs and volumes for meat, poultry, and whey imports into the EAEU.

The first stage approved the distribution of 2,835 MT of beef among eight importers and 31,500 MT of poultry among 33 importers; the second stage approved the distribution of 8,505 MT of beef among nine importers and 94,500 MT of poultry among 40 importers. For more information please, see our previous report, [Kazakhstan Announces First Stage of 2026 Meat and Poultry Tariff Rate Quotas KZ2026-0001](#).

The relevant decree (in Russian) is available [here](#). You will find an unofficial English translation as an attachment to this report.

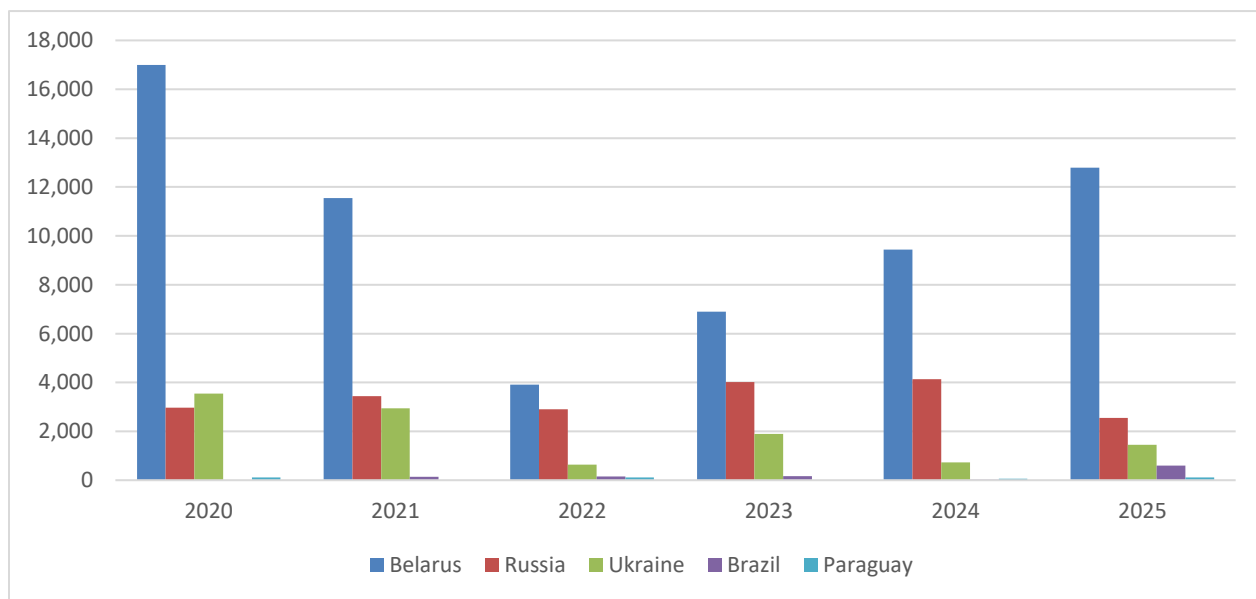
Impact

The United States was number nine in exports of beef to Kazakhstan in 2025, sending 11 MT valued at \$390,000, or less than 0.1 percent of total imports last year. The top three sources of beef for Kazakhstan were Belarus (73 percent), Russia (14.5 percent), and Ukraine (8.2 percent). American beef is mainly shipped by air to Kazakhstan for high-end retailers and HoReCa businesses. Exporters note that the U.S. dollar to Kazakhstan tenge exchange rate combined with high logistical costs to access the land-locked country limit local importers from ordering from the United States, though there remains ample opportunity for increasing U.S. market share.

Table 1. Beef and beef products imports, 2020-2025

			2020	2021	2022	2023	2024	2025	Share in 2025, %
_World		T	26,068	20,340	8,728	14,605	15,685	17,612	
Belarus	1	T	17,001	11,551	3,917	6,895	9,434	12,788	72.6%
Russia	2	T	2,963	3,441	2,903	4,011	4,134	2,553	14.5%
Ukraine	3	T	3,543	2,936	639	1,888	729	1,446	8.2%
Brazil	4	T	0	140	151	168	26	593	3.4%
Paraguay	5	T	112	0	112	0	56	112	0.6%
Argentina	6	T	56	195	0	83	56	55	0.3%
Uruguay	7	T	0	26	0	0	427	28	0.2%
Kyrgyzstan	8	T	1	0	0	0	0	20	0.1%
United States	9	T	141	9	10	10	13	11	0.1%

Source: TDM LLC.



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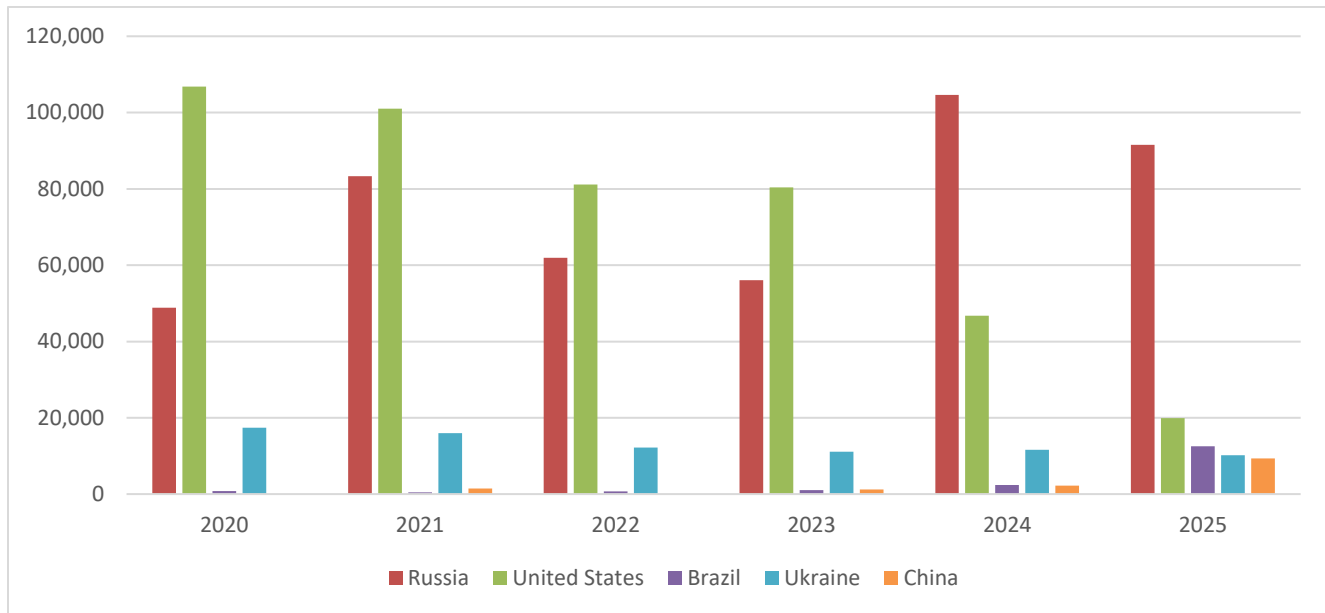
United States poultry exports have decreased significantly since 2019 when they reached a peak of 130,000 MT, to only 20,000 MT in 2025. Supply has become highly concentrated in Russia (60 percent market share), while U.S. share has collapsed due in part to Kazakhstan’s curious interpretation of its WTO commitments and those it has to the Eurasian Economic Union. New suppliers like Brazil and China accounted for around 14 percent of total supply in 2025.

The usual transportation route for U.S. poultry meat delivery is by sea to the Port of Poti in Georgia and then rail through Azerbaijan, across the Caspian Sea to the Kazakh Port of Aktau, and on to the final destination again by rail.

Table 2. Poultry meat and products imports, 2020-2025

			2020	2021	2022	2023	2024	2025	Share in 2025, %
_World		T	188,866	219,334	174,361	160,420	175,810	152,122	
Russia	1	T	48,841	83,351	61,945	56,033	104,661	91,585	60%
United States	2	T	106,827	100,993	81,151	80,348	46,790	19,887	13%
Brazil	3	T	758	485	727	1,077	2,410	12,515	8%
Ukraine	4	T	17,416	15,929	12,184	11,099	11,581	10,159	7%
China	5	T	0	1,457	0	1,174	2,223	9,326	6%

Source: TDM LLC.



Source: TDM LLC.

Attachments:

[2026 Beef and Poultry TRQs Translation \(Unofficial\).docx](#)