

Required Report: Required - Public Distribution

Date: March 02, 2026

Report Number: KZ2026-0003

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 wheat and barley production are both forecast to reach near record levels in marketing year (MY) 2025/26. Export levels for wheat will approach last year's record of 10.0 million metric tons (MMT), aided by the government's transportation subsidy and a continued push amongst grain traders to diversify their export markets. Meanwhile, exports of feed flour – made from wheat and barley – to China have boomed during the first quarter (Sep-Dec) of MY 2025/26 and could reach as much as 3.0 MMT by year's end. (Note: Feed flour exports are not included in the wheat and barley PSDs.)

WHEAT

Production

Based on feedback from local growers and the government's latest production figures, Post is forecasting MY 2025/26 wheat production at 18.0 million metric tons (MMT), down slightly from last year's second biggest wheat harvest on record.

The main reason for the year-to-year drop in production was farmers' decision to reduce wheat plantings and grow more oilseeds, especially sunflowers and rapeseed, since these oilseed crops were considered more profitable. The impact on production from this contraction in area was partially offset by improved yields resulting from favorable weather conditions during most of the growing and harvesting seasons.

According to the latest crop production report from Kazakhstan's Bureau of National Statistics (BNS), MY 2025/26 wheat production is forecasted at the second highest on record at 19.3 MMT. Post and industry sources believe this figure is overstated based on observed yields in the field. See annexes 1 and 2 for BNS crop production forecasts for MY 2025/26.

In Post's previous report, we anticipated a large downturn in MY 2025/26 wheat production because of an unusual spell of cold and wet weather at the time we were preparing our report in early October. However, weather conditions improved shortly thereafter and weather-related losses during this period were much smaller than expected.

The state-run company, the Food Contracting Corporation (FCC), buys and sells domestic wheat and barley to stabilize local market conditions. Last October, FCC [announced](#) its purchase prices for both commodities, as shown in table 1 below.

Table 1. FCC Purchase Prices for Domestic Wheat and Barley

Crops with various qualities	Price (including VAT 16%), Kazakhstan tenge	Price, USD (exchange rate \$1=489.99 tenge)
Wheat, class 3 (gluten 27%+)	115,000	234
Wheat, class 3 (gluten 25-27%, falling number from 250)	96,000	196
Wheat, class 3 (gluten 25-27%, falling number from 200)	94,000	192
Wheat, class 3 (gluten 23-24%, falling number from 230)	92,000	188
Wheat, class 3 (gluten 23-24%, falling number from 160)	90,000	184
Wheat, class 4 (gluten 20-22%, falling number from 200)	82,000	167
Wheat, class 4 (gluten 18-19%, falling number from 80)	80,000	163
Wheat, class 5 (gluten 18%)	70,000	143
Durum wheat (vitreousness 60, falling number from 200)	90,000	184
Barley, class 2	75,000	153

Note: Classes 1-3 food grade quality grain, Classes 4-5 feed quality grain

Consumption

MY 2025/2026 wheat consumption is forecasted higher for the fourth consecutive year to almost 8.7 MMT. This steady increase in consumption is mainly linked to the growing demand for feed-grade wheat that is used

to make feed flour – a combination of wheat and barley flour – for export to China. Additionally, wheat consumption is also growing because of rising animal feed demand resulting from Kazakhstan’s expanding livestock and poultry inventories. See table 2 for Kazakhstan’s latest animal numbers.

Table 2. Cattle and Poultry Inventories as of January 1, 2026

	As of Jan 1, 2026	As of Jan 1, 2025	Change, %
Cattle	8,167,225	7,967,665	+2.4%
Including Cows	4,471,374	4,360,372	+2.5%
Sheep	18,841,221	18,546,044	+1.6%
Goats	1,709,373	1,678,326	+1.8%
Pigs	474,722	479,662	-1.0%
Horses	4,595,655	4,353,028	+5.6%
Camel	293,984	280,522	+4.8%
Poultry	48,619,958	45,481,941	+6.9%

Source: [Bureau of National Statistics Livestock report as of January 1, 2026](#)

While the demand for wheat to produce animal feed for domestic consumption and export is increasing, FSI wheat consumption, which accounts for the majority of overall wheat consumption, is expected to hold steady year-to-year. Milling wheat is predominantly used to make flour for bread, pastries, and other flour-based foods.

Trade

MY 2025/26 wheat exports are forecasted almost unchanged from last year at 10.0 MMT, based on available exportable supplies, the extension of the transportation subsidy until September 2026 ([KZ2025-0011](#)), and a strong export performance during the first quarter of the marketing year. Wheat exporters continue seeking to diversify and expand their export markets.

Wheat exports from September through December climbed to 5.3 MMT, nearly 40 percent higher than the same time the prior year. As shown in annex 2 trade data, the top export destinations were neighboring Central Asian countries as well as Afghanistan and Azerbaijan.

Kazakhstan also exported smaller volumes of wheat to distant markets in Europe and North Africa, such as Italy and Algeria. These shipments were probably transshipped through the Baltic Sea ports. According to a [report](#) from the Ministry of Agriculture, Kazakhstan exported 116,000 MT of wheat through Baltic Sea ports during the first quarter (Sep-Dec).

As shown in chart 1, MY 2025/26 monthly export volumes spiked in December at 2.1 MMT. Contacts report that this sudden increase was primarily due to increased sales of milling wheat to buyers in Uzbekistan who were trying to get ahead of rising export offer prices. These prices were reportedly higher than usual because of the growing demand for dual-purpose wheat, which can be used for feed or food, to produce feed flour for export to China.

Wheat Exports to China Take a Temporary Nosedive, but Feed-Flour Exports Boom

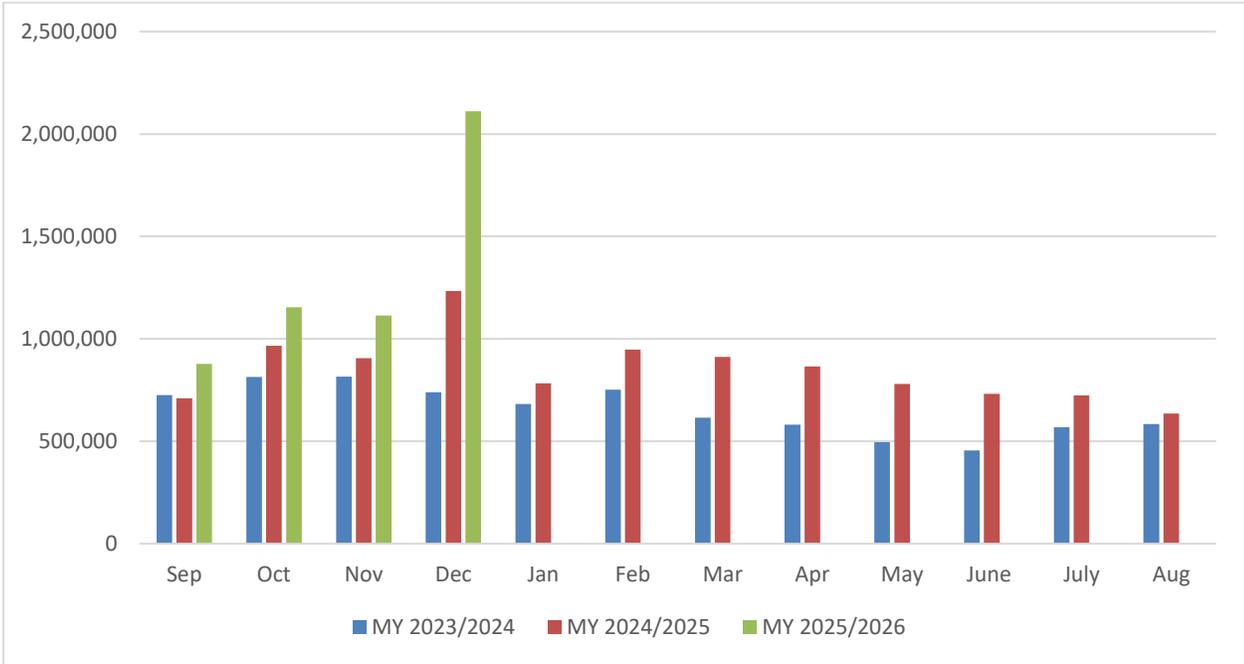
During the first quarter of the marketing year (Sep-Dec), wheat exports to China, one of Kazakhstan’s top exports, plummeted compared to the same time last year. According to a [news story](#) quoting Kazakhstan Railways (KTZ), this downturn in wheat sales was in part due to a slowdown in border crossings resulting from train traffic congestion in October and November and lengthy grain inspection procedures. Kazakh and Chinese rail authorities have since made changes to help reduce the congestion.

While exports of Kazakh wheat have slipped lower, shipments of feeding flour (HS 230990) to China more than doubled in the first quarter to 1.2 MMT. Industry sources predict that feed flour exports in MY 2025/26 could reach as high as 3.0 MMT. Feeding flour, which is not included in our PSD figures, is made up of about 80 percent feed-grade wheat and about 20 percent of feed grade barley.

Amended Tax Law Could Hamper Wheat Exports in the Future

Historically, the government has reimbursed grain exporters the 16 percent VAT they exported wheat. However, with a recent change to the country’s tax law, which went into effect on January 1 of this year, exporters will now only be reimbursed one-fifth of the total VAT. Sources indicate that this change has led to a slowdown in exports during January-February. Exporters are reportedly engaging the government to find a solution. In the meantime, it’s too early to assess how this change, if it remains permanent, will impact annual wheat exports in MY 2025/26.

Chart 1. Monthly Wheat Exports, MT



Source: TDM LLC.

Stocks

Based on current market conditions, Post is holding MY 2025/26 wheat stocks largely unchanged from last year at about 4.0 MMT. According to January data from the Grain Receipts Digital Platform, total grain stocks held in licensed warehouses in the three biggest wheat growing regions – Akmola, North Kazakhstan, and Kostanay, were reported at about 5.0 MMT. Post assesses that most of these stocks are wheat. Licensed warehouse grain storage levels as shown in table 2 are within the normal range for this time of year as grain traders seek to liquidate old stocks ahead of the new MY 2026/27 crop.

Table 2. Licensed Warehouse Grain Storage Levels by Region (MT) as of January 28, 2026

	Total storage capacity	Available free capacity	% of currently stored crops
Kazakhstan TOTAL	12,761,840	7,376,495	42%
Akmola region	4,484,440	2,185,616	51%
North-Kazakhstan region	2,996,800	1,629,084	45%
Karaganda region	133,000	69,197	47%
Kostanay region	2,906,900	1,587,313	45%
East-Kazakhstan region	489,000	408,989	16%
Aktobe region	339,000	262,129	22%
Pavlodar region	277,300	188,513	32%
Astana city	243,000	218,162	10%
West-Kazakhstan region	634,800	580,662	8%
Almaty region	58,600	54,978	6%
Abay region	27,000	27,000	0%
Turkestan region	72,000	64,845	9%
Mangistau region	100,000	100,000	0%

Source: [Grain Receipts Digital Platform Qoldau](#)

Wheat PSD

Wheat Market Year Begins	2023/2024		2024/2025		2025/2026	
	Sep 2023		Sep 2024		Sep 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Kazakhstan						
Area Harvested (1000 HA)	13130	13130	13067	12500	12200	11457
Beginning Stocks (1000 MT)	4209	4209	3445	3445	4028	4028
Production (1000 MT)	12111	12111	18577	18577	18900	18000
MY Imports (1000 MT)	2500	2500	500	500	700	700
TY Imports (1000 MT)	2347	2347	600	600	700	700
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	18820	18820	22522	22522	23628	22728
MY Exports (1000 MT)	7825	7825	10194	10194	9700	10000
TY Exports (1000 MT)	8409	8409	9986	9986	9700	10000
Feed and Residual (1000 MT)	2500	2500	3200	3200	3500	3500
FSI Consumption (1000 MT)	5050	5050	5100	5100	5150	5150
Total Consumption (1000 MT)	7550	7550	8300	8300	8650	8650
Ending Stocks (1000 MT)	3445	3445	4028	4028	5278	4078
Total Distribution (1000 MT)	18820	18820	22522	22522	23628	22728
Yield (MT/HA)	0.9224	0.9224	1.4217	1.4862	1.5492	1.5711
(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

Barley, production in MY 2025/26 is forecasted lower year-to-year at 3.6 MMT, but still at the second highest level on record. Production decreased a little because some farmers started growing more oilseeds in hopes of higher profit margins. This prediction aligns with the figure reported by Kazakhstan's Bureau of National Statistics (BNS). See annex 1 for BNS crop production statistics for MY 2025/26.

The state-owned Food Contracting Corporation (FCC) buys and sells local barley to help stabilize prices and market conditions. Please refer to the wheat production section for FCC's MY 2025/26 purchase prices for barley and wheat in table 1 above.

Consumption

MY 2025/26 barley consumption is forecasted to increase year-to-year to 1.9 MMT, owing to the continued strong demand for barley in feed rations to feed a growing number of livestock. See table 2 above for the latest animal inventories. Another factor driving barley consumption higher in MY 2025/26 is rising exports of feed flour to China. Feed flour is made from 20 percent barley flour and 80 percent wheat flour.

Barley is mainly consumed as feed for cattle, poultry and other species. Barley is also used to make traditional side dishes.

Trade

In MY 2025/2026, barley exports are forecasted lower year-to-year to 1.8 MMT because of a slowdown in exports during the first half of the marketing year (Jul-Dec). Exports during this period fell compared to the same time last year, with exports to Iran and China – the two top export markets for Kazakh barley – slipping by double digits. In contrast, barley exports to Uzbekistan have picked up, but not enough to offset the losses to these top two markets.

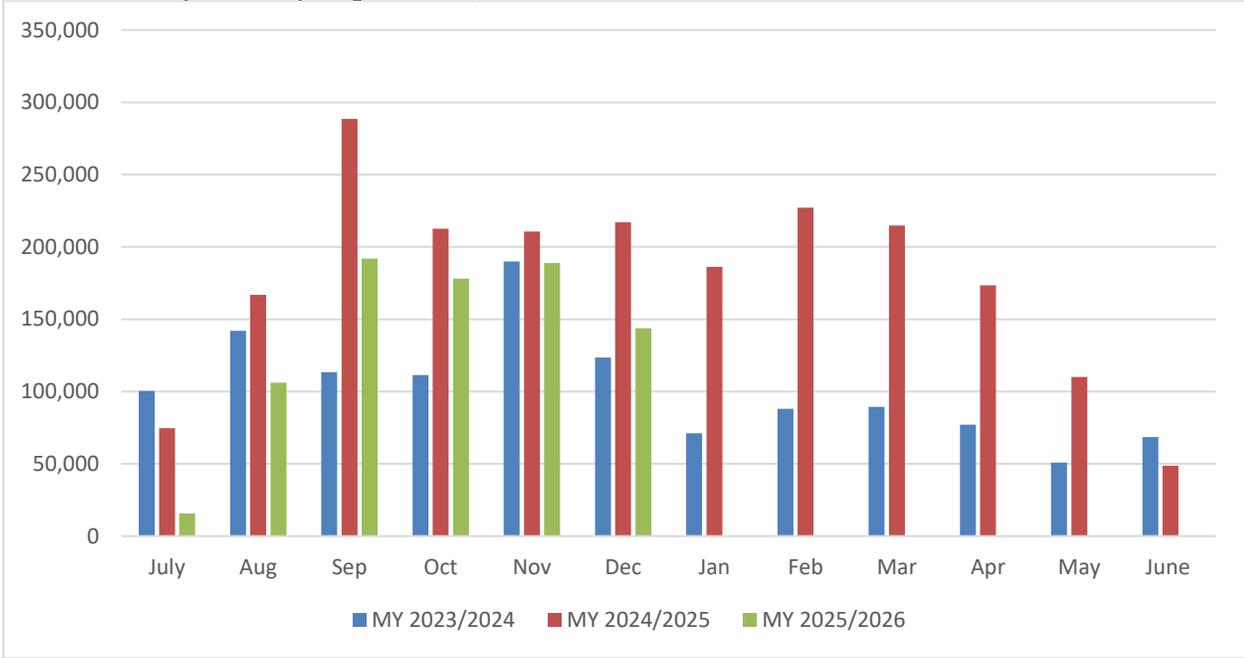
According to contacts, barley exports to Iran are down due to several factors. In connection with the regional geopolitical situation, there's a reported shortage of grain vessels running between Kazakh and Iranian ports on the Caspian Sea. This shortage has made freight costs more expensive. In addition, rising competition with Russian barley in October-November, and stormy conditions on the Caspian Sea in December also contributed to reduced sales to Iran.

The majority of Kazakhstan's barley sales to Iran are funneled through the government-owned Ak-Bidai terminal on the Caspian Sea. The terminal, which is owned by an FCC subsidiary, has the capacity to handle 600,000 MT of grain each year.

Kazakhstan's barley sales to China were reportedly down in the first half of the marketing year because of rail congestion at major border checkpoints between both countries and delays in Chinese authorities carrying out quarantine inspections and testing. Kazakh and Chinese rail authorities have reportedly resolved the congestion problem.

The amended tax law, which went into effect at the beginning of January, has reduced the amount of VAT reimbursed to grain exporters. This change could impact MY 2025/26 barley exports. However, it's too early to assess the impact of this tax change, which grain exporters are trying to reverse. See wheat trade section for more details.

Chart 2. Barley Monthly Export Data, MT



Source: TDM LLC.

Stocks

Barley stocks are forecasted at a little more than 200,000 MT, nearly unchanged from last year.

Barley PSD

Barley Market Year Begins	2023/2024		2024/2025		2025/2026	
	Jul 2023		Jul 2024		Jul 2025	
	USDA Official	New Post	USDA Official	New Post	USDA Official	New Post
Kazakhstan						
Area Harvested (1000 HA)	2425	2425	2283	2283	2300	2200
Beginning Stocks (1000 MT)	413	413	202	202	203	203
Production (1000 MT)	2614	2614	3840	3840	3700	3600
MY Imports (1000 MT)	300	300	91	91	100	100
TY Imports (1000 MT)	233	233	79	79	100	100
TY Imp. from U.S. (1000 MT)	0	0	0	0	0	0
Total Supply (1000 MT)	3327	3327	4133	4133	4003	3903
MY Exports (1000 MT)	1225	1225	2130	2130	1800	1800
TY Exports (1000 MT)	1399	1399	1914	1914	1700	1700
Feed and Residual (1000 MT)	1600	1600	1500	1500	1600	1600
FSI Consumption (1000 MT)	300	300	300	300	300	300
Total Consumption (1000 MT)	1900	1900	1800	1800	1900	1900
Ending Stocks (1000 MT)	202	202	203	203	303	203
Total Distribution (1000 MT)	3327	3327	4133	4133	4003	3903
Yield (MT/HA)	1.0779	1.0779	1.682	1.682	1.6087	1.6364
(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						

Annex 1

Main Crops Area Planted and Harvested

Crop	Area planted, ha		Area harvested, ha	
	MY25/26	Percent Change Versus MY 24/25	MY25/26	Percent Change Versus MY 24/25
WHEAT winter and spring	12,308,07	93.2	12,194,509	93.3
CORN	177,470	109.0	175,687	108.3
BARLEY winter and spring	2,328,446	100.8	2,281,981	99.9
RYE winter and spring	19,906	96.6	19,644	96.1
OAT	177,514	90.7	175,336	90.8
SORGHUM	20,714	100.3	19,036	98.5
RICE	101,366	103.1	101,245	103.1
OILSEEDS	4,025,756	138.9	3,943,227	144.2
COTTON	145,565	136.8	145,537	136.8

Source: [Kazakhstan's Statistical Service Final Report, Feb 6, 2026](#)

Main Crops Production and Yields

Crop	Production, tons (weight after cleaning)		Yields, ton/ha	
	MY25/26	MY25/26 to MY24/25, %	MY25/26	MY25/26 to MY24/25, %
WHEAT winter and spring	19,325,827	104.0	1.68	110.5
BARLEY winter and spring	3,593,097	93.6	1.67	93.8
RYE winter and spring	30,930	98.9	1.68	104.3
OAT	274,248	83.2	1.66	90.7
SORGHUM	17,624	84.1	0.98	85.2
RICE	525,903	102.5	5.48	96.5
OILSEEDS	4,948,501	148.3	-	-

Source: [Kazakhstan's Statistical Service Final Report, Feb 6, 2026](#)

Annex 2. Kazakhstan's Wheat and Wheat Flour Exports MY 2023-25

Partner Country	Rank	Unit				Year to Date		
			MY 2022/2023	MY 2023/2024	MY 2024/2025	09/24- 12/24	09/25- 12/25	%Δ
_World		WGE	10,873,507	7,825,401	10,193,508	3,815,067	5,257,135	37.8
Uzbekistan	1	WGE	4,649,345	3,438,083	4,378,554	1,845,244	3,030,398	64.23
Afghanistan	2	WGE	2,604,049	1,912,071	1,818,916	841,824	955,111	13.46
Tajikistan	3	WGE	1,187,564	1,124,941	1,385,364	542,452	514,814	-5.1
Azerbaijan	4	WGE	276,427	2,595	696,881	171,604	126,925	-26.04
Italy	5	WGE	449,623	342,410	455,792	61,273	9,381	-84.69
Kyrgyzstan	6	WGE	34,992	85,645	421,409	97,818	217,202	122.05
China	7	WGE	429,571	624,593	222,954	144,032	17,446	-87.89
Turkmenistan	8	WGE	607,702	186,014	181,958	52,146	90,966	74.44
Algeria	9	WGE	0	0	181,026	0	139,958	0
Morocco	10	WGE	0	0	161,882	0	0	0
Georgia	11	WGE	1,177	672	81,141	4,566	36,725	704.31
Russia	12	WGE	74,800	59,585	58,970	19,128	22,667	18.5
Latvia	13	WGE	54,206	9,669	45,576	26,310	7,231	-72.52
Vietnam	14	WGE	0	0	17,727	0	0	0
Egypt	15	WGE	0	0	16,521	0	0	0
Portugal	16	WGE	9,017	0	14,232	0	2,173	0
Norway	17	WGE	7,160	4,791	11,500	3,000	1,400	-53.33
Netherlands	18	WGE	430	0	11,177	10	2,860	28,500
Belgium	19	WGE	1,778	8,187	10,320	0	0	0
Denmark	20	WGE	3,000	2,700	5,367	0	0	0
Iraq	21	WGE	1,575	465	5,000	0	0	0
Poland	22	WGE	12,499	28	3,013	0	0	0
United Kingdom	23	WGE	0	0	3,000	3,000	3,000	0
Turkey	24	WGE	155,741	16,953	2,264	2,154	21,625	903.95
United Arab Emirates	25	WGE	60	57	1,550	0	0	0
Mongolia	26	WGE	472	212	503	144	70	-51.39
Belarus	27	WGE	570	520	254	88	196	122.73
Armenia	28	WGE	194	273	204	169	27	-84.02
Iran	29	WGE	163,437	19	200	0	56,510	0
Germany	30	WGE	227	26	70	58	6	-89.66
United States	31	WGE	0	0	66	0	0	0
Moldova	32	WGE	73	11	56	27	0	-100
Israel	33	WGE	43	26	44	16	0	-100

South Korea	34	WGE	0	34	13	0	56	0
Lithuania	35	WGE	133	49	2	2	0	-100
Oman	43	WGE	0	0	0	0	50	0
Pakistan	44	WGE	0	70	0	0	336	0

Source: TDM LLC.

Annex 3. Kazakhstan’s Barley Exports MY 2023-25

Partner Country	Rank	Unit				Year to Date		
			MY 2022/2023	MY 2023/2024	MY 2024/2025	07/24- 12/24	07/25- 12/25	%Δ
_World		T	1,112,775	1,225,326	2,130,485	1,170,107	824,243	-29.56
Iran	1	T	436,327	62,027	1,217,744	520,837	421,313	-19.11
China	2	T	426,811	927,751	628,299	483,226	198,530	-58.92
Uzbekistan	3	T	160,409	165,635	152,270	87,084	136,279	56.49
Tajikistan	4	T	70,370	54,068	82,506	51,301	56,399	9.94
Azerbaijan	5	T	0	204	34,715	22,549	0	-100
Iraq	6	T	3,780	0	14,152	4,604	985	-78.61
Oman	7	T	257	256	399	399	0	-100
Turkey	8	T	154	0	220	0	0	0
Kyrgyzstan	9	T	0	3,236	93	90	9,986	10,995.56
United Arab Emirates	10	T	0	0	70	0	0	0
Afghanistan	11	T	11,821	11,097	17	17	529	3,011.76
Denmark	12	T	0	0	0	0	0	0
France	13	T	0	0	0	0	0	0
Netherlands	14	T	0	0	0	0	0	0
Israel	15	T	0	0	0	0	0	0
Turkmenistan	16	T	0	0	0	0	0	0
United Kingdom	17	T	0	0	0	0	0	0
Pakistan	18	T	68	69	0	0	0	0
Russia	19	T	2,667	984	0	0	222	0
Syria	20	T	110	0	0	0	0	0

Source: TDM LLC.

Attachments:

No Attachments