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Report Highlights:

Central Asia is a diverse, important corner of the world and a growing market for U.S. goods. Agricultural imports from the world for Kazakhstan, the Kyrgyz Republic, and Uzbekistan totaled \$11.6 billion in 2023 and have nearly doubled over the last three years, with the United States as the 11th largest trade partner at \$196 million. Between the five Central Asian countries – Kazakhstan, Uzbekistan, Turkmenistan, Tajikistan, and Kyrgyzstan – the entire region comprises about 80 million people and is projected to reach 100 million by 2050. Companies are encouraged to discover this unique region of the world, the United States' farthest market.

SECTION I. – MARKET OVERVIEW

Central Asia is a diverse, important corner of the world and a growing market for American goods. Agricultural imports from the world for Kazakhstan, the Kyrgyz Republic, and Uzbekistan totaled \$11.6 billion in 2023 and have nearly doubled over the last three years, with the United States as the 11th largest trade partner at \$196 million. Nestled between Russia to the North, China to the East, and Iran to the South, Central Asia represents the confluence of East and West. Between the five Central Asian countries – Kazakhstan, Uzbekistan, Turkmenistan, Tajikistan, and Kyrgyzstan – the entire region comprises about 80 million people and is projected to reach 100 million by 2050. Across the region, wealth mostly derives from natural resources, especially petroleum and metals. However, outcomes are widely divergent. Each country is quite different in terms of GDP, development, democracy level, and culture. For example, Kazakhstan is relatively highly developed, wealthy, and liberal compared to Turkmenistan or Tajikistan. Adjusted GDP per capita ranges from as low as \$5,100 (Tajikistan) to as high as \$39,300 (Kazakhstan). Therefore, care should be taken in selecting new markets and tailoring to their specific needs and opportunities.

Historically, the region is highly agricultural with strong wheat and cotton industries persisting to this day. Agriculture has slowly decreased as a share of employment (19 percent across the region) and as a share of GDP (12 percent). However, agriculture remains an important industry in Kazakhstan and Uzbekistan. A legacy of Soviet times, Uzbekistan is still a world leader in cotton production. With fraught water resources, Uzbekistan is working to diversify its agricultural sector. Since 2018, relaxation of seed import duties, Uzbekistan has imported more sowing seeds, particularly from Europe. Steppe pastureland makes up about 70 percent of Kazakhstan’s vast territory, and its young but growing cattle industry has attracted a lot of investment in recent years. As a result, Kazakhstan is now importing over \$100 million USD in animal feed, including from the United States.

Though development is uneven, the region is moving toward more foreign goods and diverse tastes serving a growing population. U.S. exporters should look to the larger cosmopolitan cities as potential destinations for U.S. products. In Kazakhstan, the wealthiest and most outward-facing country, capitol Astana (1.4 million) and cities Almaty (2.2 million) and Shymkent (1.2 million) have grown considerably. As in Kazakhstan, Uzbekistan and Kyrgyzstan also have a growing urban middle classes in the cities of Tashkent (3 million) and Bishkek (1.1 million). All these cities have seen an expansion of American food chains in the last decade. At least 130 KFCs exist across four Central Asian countries. Many young city residents enjoy American-style food, with growth in chicken consumption. In 2023, Central Asia* imported \$336.6 million USD in poultry meat. The United States is the #1 supplier of Kazakh poultry meat with 43.1 percent of the market. With expanding dining options, rising incomes, and growing familiarity with Western foods, more Central Asian clients are interested in what the U.S. has to offer, from meat to specialty healthy foods found in up-scale grocery stores and restaurants.

Table 1

Advantages	Challenges
Central Asia is largely dependent on imported food products.	Russian, Chinese, and European suppliers have significant transportation advantages over U.S. suppliers.
The United States enjoys a positive image.	Central Asian consumers have limited knowledge of U.S. brands and food products.
Kazakhstan is a trendsetter and logistical hub for other Central Asian countries.	Central Asia is seeking to expand its own agricultural production, including of process and value-added products.
There is a growing middle class, especially in the region's largest cities.	Population is still quite dispersed across a vast, landlocked area.
Interest in foreign products and a culture of hospitality create a favorable market for food products at a wide range of prices.	Importers often prefer to buy relatively small volumes of new products.

SECTION II. – EXPORTER BUSINESS TIPS

General Consumer Tastes and Trends

Meat plays an important role in the Central Asian diet. In addition to the traditional horse meat, beef, mutton, and poultry are all widely consumed. Each country, though secular in government, has a predominantly Muslim population, which has experienced a revival since the end of Soviet atheism. Thus, most animal products will need to meet halal standards. Pork consumption is limited, especially in the more Muslim countries (Tajikistan, Turkmenistan, and Uzbekistan). There is some pork consumption in Kazakhstan, which has a higher ethnic European and Russian population.

Shaped by a deep history of nomadism and contact with other cultures, Central Asian food is a diverse mix of flavors. Traditional meals often involve a stew of meat and vegetables over thick noodles or rice served with tea. Kazakh dishes reflect the nomadic lifestyle, including the need for dried meats and preference for cultured dairy products. Depending on where you are, local cuisine could demonstrate Russian, Ukrainian, German, Chinese, Korean, Turkish, or Afghan influence. Larger cities may have more Western-style fast food chains as well as up-scale French, Italian, or Japanese cuisine.

Central Asia is known for its hospitality in everyday interactions as well as more formal festivals and celebrations. Novel or unique snack items, candies, and tea are often offered to guests. Holidays also play a role in the types of food consumed. Major holidays include New Year, Orthodox Christmas (January 1-7), Nauryz (March 21-23), Eid (variable), and family celebrations such as weddings and birthdays. Horse meat, pastries, sweets, fruits, and alcoholic and non-alcoholic beverages are important holiday foods.

Local Business Customs and Trends

Russian is the common language throughout Central Asia due to the long history of Russian and Soviet influence. Russian is typically used in business contexts, but each country has their own native Turkic or Persian language. Many republics have worked to elevate the status of their

respective language since independence. Traditional languages like Kazakh, Kyrgyz or Turkmen may be more common in rural areas. Typically, signs and products in the region include both Russian and the local language. English language proficiency varies but is typically low though growing. Kazakhstan has the most English speakers at about 30 percent with some English skills, and Uzbekistan has promoted English language programs heavily in recent years.

As post-Soviet republics, government involvement in business can be high. Kazakhstan is the most financially developed in the region and has an ease of doing business score of “very easy.” The rest of the region is either “easy” or “medium.” Turkmenistan is typically closed off to international business. Despite challenges, overall business outlook in Kazakhstan and Uzbekistan is strong. To improve ease of business, it is often important to find partners with industry experience and a good working relationship with local and national officials.

Trade Shows

Central Asia holds a variety of trade shows focused on the agricultural and food sectors each year. Events range from outdoor machinery demos to food shows focused on the restaurant sector. Hosting a booth at a trade show can offer a nice focal point for either an introductory visit to the market, or to strengthen relationships with existing clients. It is also a good opportunity to display products to potential buyers, which is essential to make sales. However, it is important to conduct additional outreach both in and outside the show during your visit, as decision makers may not plan to attend unless specifically invited. Potential trade show participants are encouraged to work with FAS Office of Central Asia in advance to check the status of the shows. Some of the key trade shows are listed below in Table 2.

Table 2

Date	Show Name	Description	Location
March 12-14, 2025	AgriTek Astana	Important spring agriculture industry trade show for northern Kazakhstan, featuring inputs such as seeds, genetics, fertilizers, crop protection products, and machinery.	Astana, KZ
May 28-30, 2025	InterFood Astana	Smaller food and drinks show. Stronger focus on bar equipment, packaging, snacks, and ingredients.	Astana, KZ
October 2025 (TBD)	KazFarm/KazAgro	Fall agriculture industry show for northern Kazakhstan, including machinery and technology. http://kazfarm.kz/en/	Astana, KZ
November 2025 (TBD)	AgroWorld Qazakhstan / FoodExpo Qazakhstan	Kazakhstan’s largest show for agricultural and food products. FoodExpo focuses on consumer-oriented foods, while AgroWorld focuses on farm equipment.	Almaty, KZ
November 2025 (TBD)	AgriTek Shymkent	Small international agriculture industry show in southern Kazakhstan. Features seeds, animal genetics/livestock, and farm equipment. Many Uzbek attendees.	Shymkent, KZ

Table 2 Cont’d.

Date	Show Name	Description	Location
February 2025 (TBD)	<u>KazAgroFood – “Fruits and Vegetables of Kazakhstan”</u>	Agriculture conference focused on fruit and vegetable agribusiness, including logistics, processing, seedlings and seeds, plant nutrition, policy, and trends in the fruit and vegetable market.	Almaty, KZ
October 2025 (TBD)	<u>Agro Expo Kyrgyzstan</u>	Small agricultural industry show in Kyrgyzstan focusing on machinery, seeds, and market trends.	Bishkek, KG
November 2025 (TBD)	<u>FoodWeek Uzbekistan</u>	Large Uzbek food industry trade show with a focus on drinks, food, ingredients, packaging, equipment,	Tashkent, UZ
October 2025 (TBD)	<u>HoReCa Uzbekistan</u>	HoReCa (Hotel, Restaurant, and Café) is an Uzbek trade fair focused on these hospitality sectors: drinks, bar equipment, tea and coffee, and franchising.	Tashkent, UZ
November 2025 (TBD)	<u>UzAgroExpo</u>	One of the largest Central Asian trade shows with emphasis on innovations in machinery, seed, feed, grain, and livestock.	Tashkent, UZ
March 11-13, 2025	<u>AgroWorld Uzbekistan</u>	Large international agriculture exhibition showcasing machinery, equipment, and technology for the poultry, livestock, and veterinary sectors.	Tashkent, UZ
July 2025 (TBD)	<u>Jana Dala – Green Day</u>	Large outdoor livestock and agricultural show including field machinery demos, steak tastings, and cattle competition.	Enbek, KZ

SECTION III. – IMPORT FOOD STANDARDS & REGULATIONS and IMPORT PROCEDURES

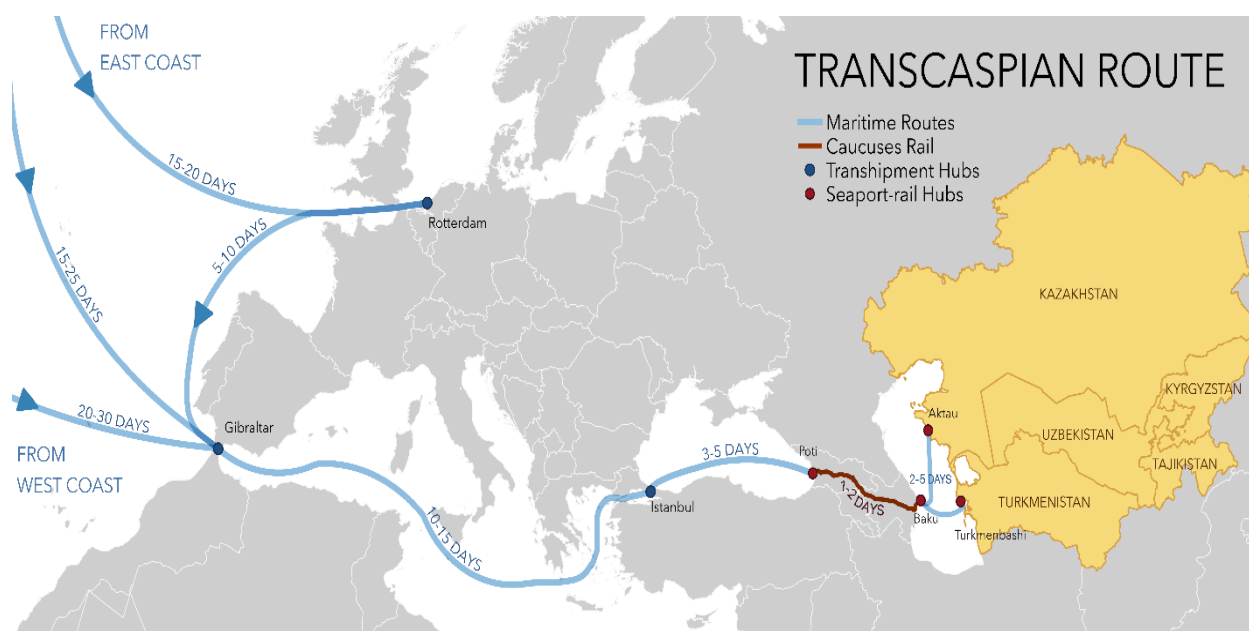
Regulations and Import Procedures

Despite proximity and shared history, each Central Asian country has different import regulations. As members of the Eurasian Economic Union (EAEU), Kazakhstan and Kyrgyzstan have harmonized many of their import requirements with other members (Russia, Belarus, and Armenia). Uzbekistan, Tajikistan, and Turkmenistan operate under their own systems. Given these differences and often changing requirements, it is important to consult import guidelines and regulations. USDA publishes Food and Agriculture Import Regulations and Standards (FAIRS) reports on country-specific legal and technical import requirements, which are available

for Kazakhstan and Uzbekistan at <https://gain.fas.usda.gov/#/home>. The USDA Animal and Plant Health Inspection Service (APHIS) provides information on live animal, animal product, and plant export phytosanitary requirements to specific countries: <https://www.aphis.usda.gov/>. Finally, the Food Safety and Information Service (FSIS) publishes resource on exporting meat, eggs, and poultry to specific countries: <https://www.fsis.usda.gov/inspection/import-export>.

Logistical Considerations

Central Asia is landlocked, and access to U.S. products may be challenged given geographic, infrastructure, and geopolitical dynamics. Nevertheless, the Trans-Caspian Corridor through the Caucasus and Caspian Sea has gained prominence in recent years as a promising transit route to Central Asia from the Americas.



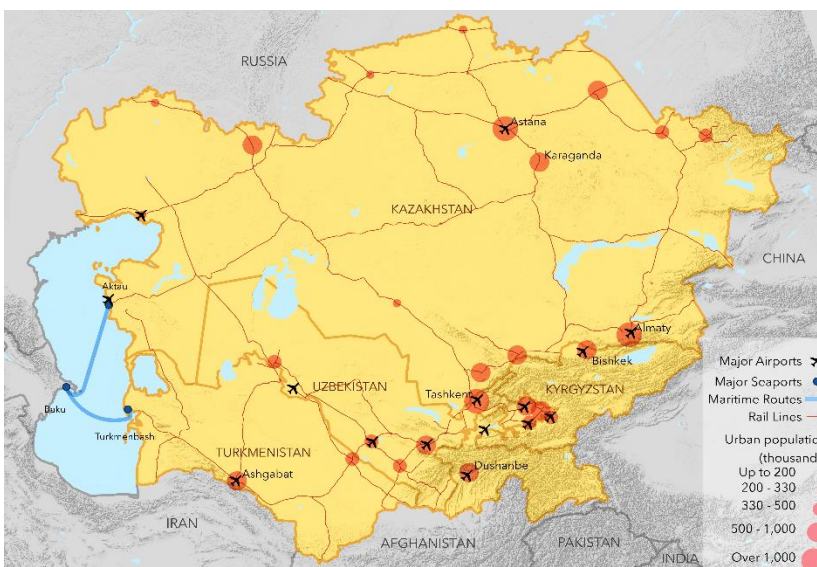
An earlier study commissioned by FAS described three major routes for U.S. exports destined for Central Asia. The first of those routes involved shipping to Tallinn, Estonia or St. Petersburg, Russia with subsequent rail transit through Russia. The political situation with Russia had deteriorated since the War in Ukraine, making this route riskier and more difficult. Similarly, the study also included rail transit through China via Qingdao or Lianyungang. Transit through China has also become trickier in recent years, and differences in rail gauges between China and Central Asia can make this route costly.

The best route into Central Asia is via the Mediterranean and Trans-Caspian International Transit Route, sometimes also referred to as the Middle Corridor. With investments and developments in key ports Poti (Georgia) and Baku (Azerbaijan) this route has increased its capacity in recent years. Typically, containers will be brought into Europe and transferred at a transshipment hub in the Netherlands, Germany, Spain, Greece, or Turkey. After crossing the Black Sea, containers will be transported by rail across Georgia and Azerbaijan and finally loaded on ferries to cross the Caspian Sea and reach the coasts of Kazakhstan or Turkmenistan. Due to strategic issues transiting through Russia in the wake of the conflict in Ukraine, this route has grown in importance. The last leg of transit between Georgia and Kazakhstan has attracted significant

expansion and investment. The Port of Poti not only offers attractive tariffs but also is nearing completion of a new terminal to vastly increase capacity. Baku and Aktau are also increasing shipping capacity to bolster trade between Europe and Asia while bypassing Russia.

Air shipment may be the best option for certain high-value and perishable products. Currently, Tashkent, Uzbekistan is the only Central Asian city with direct flights to the United States (JFK). Astana and Almaty, Kazakhstan also receive U.S. beef shipped by plane through Europe.

It is important to note that many U.S. products are first shipped to third countries, often in Europe, so the U.S. exporter may be unaware of the product's final destination. Even the Central Asian importer may not be aware of the origin of supply. Post has seen examples of shelf stable goods from suppliers in Germany, U.S. agricultural feed and livestock from the Netherlands, and U.S. nuts purchased from Turkish or Dubai traders. Though in some cases there may be more efficient ways to supply these products.



SECTION IV. – MARKET SECTOR STRUCTURE AND TRENDS

Hotel, Restaurant, and Institutional (HRI) Sector

The HRI sector is supplied by several distributors who source products locally and internationally. These companies are generally responsive to their clients in offering new products. Several international hotel chains operate in Central Asia, including Marriott, St. Regis, Radisson, Hilton, Ibis, Wyndham, and the Turkish chain Rixos.

High-end restaurants and hotels actively source imported products, including U.S. foods, as they seek consistency and quality. Quick service restaurants and cafeterias, on the other hand, are more likely to source exclusively local products. Products not available domestically, such as frozen fries, are usually imported from Russia or the European Union. Besides local chains, several U.S., Russian, and European chains are present in some of the major cities.

Retail Sector

Even in the major cities, much of the retail food sector is still dominated by traditional markets and small stores. Markets often have sections where several vendors offer similar types of products (e.g., fresh meat, poultry, vegetables, fruits, sausages, candies). Some imported products are available at these markets, such as bulk tree nuts, wine, and prepackaged candies, but the majority are local. In summer months, farmer's markets also offer produce from small private gardens.

In the bigger cities like Astana, Almaty, and Tashkent, many residents turn to local minimart stores for quicker shopping. These small stores offer a limited selection of the most common products. Minimarts are often supplied by companies that distribute their own products. This can cause sporadic availability when, for example, the local soft drink bottler is delayed in sending a truck. Some stores also buy imported or local goods at the regional wholesale market, often located just outside of the city. Overall, supply chains for these types of stores are very fractured.

American suppliers may have more luck reaching Central Asian customers through supermarkets. Supermarkets are growing in importance in Central Asia, and they likely offer a better entry point for most U.S. retail goods. Supermarkets' selection of products is typically much wider. Central Asian shoppers are increasingly turning toward supermarkets and look to higher-end stores to buy imported foodstuffs. A few of the largest chains in the region include:

- **Magnum:** The largest grocery chain by turnover, Magnum has a presence in 11 major Kazakh cities. Magnum has several formats, from convenience stores to large supermarkets. The chain had 121 outlets as of July 2024, having added nearly 40 stores in the last four years.
- **Korzinka:** Uzbekistan's largest grocery chain has 131 main store locations across the city. The company also operates small convenience stores (Smart) and a large wholesale model (Korzinka Biznes), which sells to restaurants or consumers like a Costco membership.
- **Makro:** The second largest grocery store chain in Uzbekistan operates at 108 locations across 25 different cities and towns.
- **Small:** Small is another major Kazakh grocery chain with over 121 stores in 13 cities.
- **Metro Cash & Carry:** Metro's main business is as an HRI distributor. However, the company also operates seven warehouse-style stores in major cities to supply individuals and small businesses. The chain is owned by Metro Group, based in Germany.
- **Galmart:** With seven locations across Astana and Almaty, Galmart is a growing high-end grocery chain offering a variety of international products.

Outside of the largest companies, the supermarket sector is quite fragmented. Almaty, Astana, and Tashkent have a wider range of retail options, including gourmet supermarkets that offer a larger selection of imported products. These types of stores may be good points of entry for high-value and specialty foods and beverages from the United States.

Supply chains vary by company, with some retailers importing directly and others working through distributors. These distributors work with the major retail chains and have a presence throughout the country.

Food Processing Sector

Central Asia faces challenges with regulations and strong competition from Russia. Much food processing is small in scale and localized; for example, few flour or milk brands are available widely. However, a few companies have wide distribution, including producers of processed meat products and confectionery. Tree nuts, including almonds and pistachios, are among the

main food processing sector imports from the United States currently. These are used in confectionery, or lightly processed and re-packaged for consumer-friendly retail packs.

Best Prospects for U.S. Exporters

Beverages: Central Asia has shown a growth in sales for alcoholic and non-alcoholic beverages, especially wine, spirits, sodas, and teas. Particular “experiential drinks” or unique flavors are popular among young people. In Kazakhstan, imports of non-alcoholic beverages more than doubled since 2019 while it grew nearly nine-fold in Uzbekistan. Alcohol sectors, including wines, spirits, and beers, have seen similar growth. In Uzbekistan, wine imports more than tripled since 2019, but U.S. market share still hovers around 1 percent. Despite being a nearly \$700 million USD industry, the United States plays a very small role in the market, typically less than half a percent of market share for non-alcoholic and 2.5 percent for alcoholic beverages. With high quality specialty drinks, wines, and spirits like whiskey, the United States has a lot of offer Central Asian consumers.

Feed and Additives: Kazakhstan has some of the world’s most expansive pastureland, and the country has begun to take advantage. Cattle ranching and other livestock husbandry has increased in recent years, requiring more feed and feed additives. Feed and additive imports to the region have doubled in both Kazakhstan and Uzbekistan since 2019. Despite being the largest exporter of feed and additives in the last five years, the United States supplies only 3 percent of the Kazakh market and none of the Uzbek market. Given this large and growing market, U.S. traders should look to Central Asia for feed and additive market opportunities.

Planting Seeds: Central Asia and the United States share many similarities in climate. Between hot summers and long, cold winters across vast expanses of grassland, much of Kazakhstan resembles the Upper Midwest. Recently, Central Asian importers, mainly from Kazakhstan and Uzbekistan have become increasingly interested in U.S. seed technology for wheat, linseed, lentils, corn, and others. The market has grown about 155 percent in the last five years. Surprisingly though, U.S. market share has not kept pace and has fallen from 7.1 percent to 3.8 percent. With increasing attention to Central Asia, seed companies could take advantage of these opportunities, though doing so will require sellers to navigate restrictions on bioengineering. For more details, please see GAIN report [KZ2020-0010 Kazakhstan-Market Opportunities for Planting Seeds](#). Please also see the latest biotechnology report via [GAIN](#) for biotech restrictions.

Dog and cat food: Dog and cat food is a small sector that has grown considerably in recent years. The value of dog and cat food imports have more than doubled in Kazakhstan and quadrupled in Uzbekistan since 2019. Due to rising incomes and increasing pet ownership, many customers are looking to buy specialty, quality pet food products. However, the United States has exported no dog or cat food to the region in the last few years, losing out on a popular and growing market.

Bovine Genetics: Just as with feed and fodder, the growing cattle industry in Central Asia has increased the need for cattle genetics. Kazakh and Uzbek cattle ranchers are looking to buy specialty breeds that will improve the genetics, and cattle from the United States generally fare well in the Central Asian steppes. While importing live animals is currently costly and logistically complex, importing genetics in the form of bovine semen or embryos is more economical. Bovine semen imports were four times larger in 2023 than they were four years

earlier. So far, U.S. exporters have taken advantage of this growth, supplying two-thirds of the market in Kazakhstan, which only continues to grow.

SECTION V. – AGRICULTURAL AND FOOD IMPORTS

Agricultural & Food Import Statistics

As noted in Section III above, U.S. products may transit one or more other countries before arriving in Kazakhstan. Therefore, export data may not provide reliable observations on where U.S. products end up. Import statistics, including from the U.N. Comtrade database, are generally more reliable to understand current data and trends.

Fastest-Growing Consumer-Oriented Product Imports

The following charts show particularly attractive sectors in the two largest markets in the region, Kazakhstan and Uzbekistan. As described in Section IV above, the commodities mentioned here are those that have grown considerably in the last five years even through the COVID-19 pandemic and beyond. Of the following five commodities in both countries, the total market has grown from \$282 million USD in 2019 to \$755 million in 2023. However, U.S. market share has stayed flat or even dipped slightly to around 1.5 percent, and each has experienced major changes in their food imports since the pandemic with customers increasingly turning toward international brands and imports. While some sectors, like beverages, beef, and pork have grown, the share of these major products coming from U.S. suppliers has fallen. In Kazakhstan, as the pet food, egg, pork, processed fruit, and non-alcoholic beverage sectors have grown rapidly, the U.S share of these products has fallen to less than half of a percent in 2023. U.S. suppliers should look to the growing Central Asian market and look to advertise and expand product sales in the region.

Chart 1

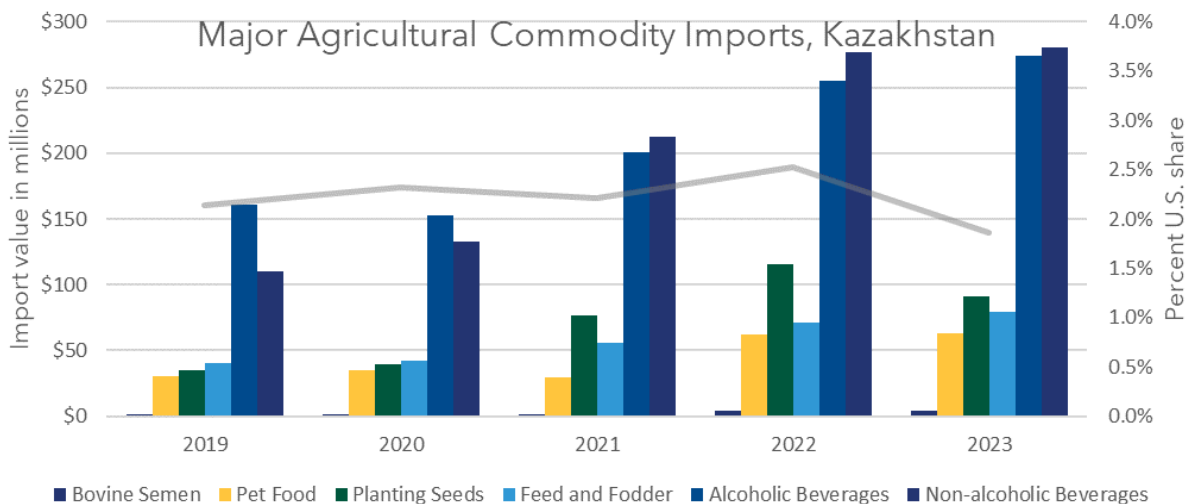
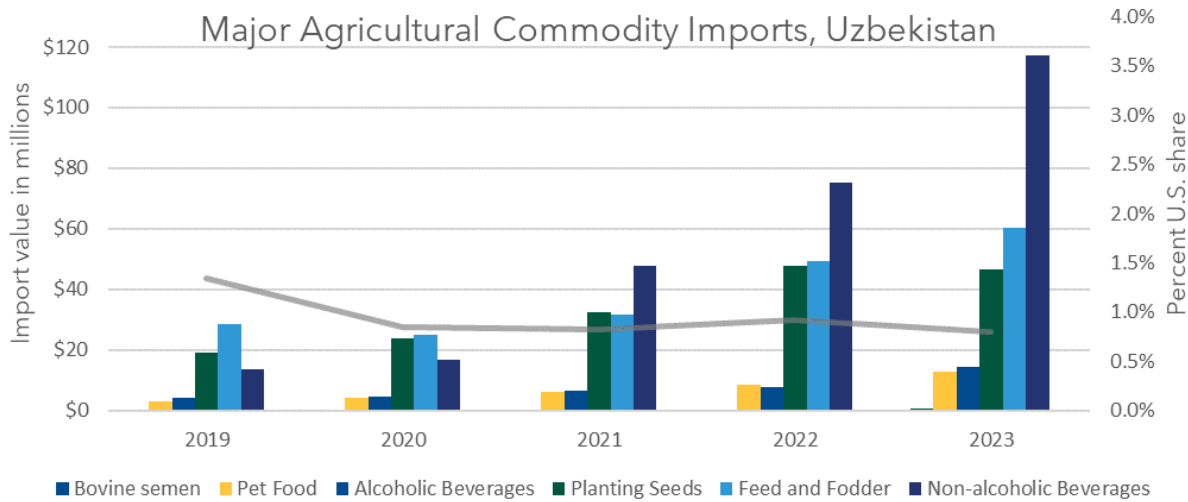


Chart 2



SECTION VI. – KEY CONTACTS and FURTHER INFORMATION

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