Central Asia Observation **Research Article**
Vol. 8 (2025) · ISSN 3005-4818 journal.pe.ac/Central-Asia-Observation

Kazakhstan's Wheat Exports, 2019–2024 — Partner Structure in a Contracting Market

Timur Bektemirov[a], Farhod Rakhimov[a]

[a]Academy of Public Policy and Economics, London E1 0SG, United Kingdom

Corresponding author: Timur Bektemirov, timur.bektemirov@pe.ac.

Published 20 December, 2025.

DOI: https://doi.org/10.62432/APPE.CAO.2025.8.33

Article webpage: https://journal.pe.ac/Central-Asia-Observation/paper/view/462941

Abstract

Kazakhstan's wheat export earnings became more concentrated in their two leading Central Asian destinations as other markets contracted more sharply. Using retained UN Comtrade records for HS 1001 over 2019–2024, this study compares export value, net weight and destination structure. Export value rose from USD 1.003 billion in 2019 to USD 1.913 billion in 2022, then fell to USD 1.122 billion in 2024. Uzbekistan and Tajikistan remained the two largest destinations throughout; their combined share rose from 56.7% in 2019 to 75.0% in 2024. The final-year increase occurred despite a 20.6% decline in value associated with those two countries from 2023. Other destinations fell by 64.6% and accounted for 70.1% of the USD 730.8 million total decline. Secondary ranks changed substantially: Italy remained fourth in 2024 despite a 67.3% fall in value, Iran ranked eleventh in 2023, and Turkmenistan fell from third in 2023 to eighth in 2024. The retained record shows a persistent regional core and a more variable set of secondary destinations. Its defining adjustment is concentration through uneven contraction, rather than expansion in the two leading markets.

Keywords: wheat; exports; Kazakhstan; Central Asia; destination concentration; UN Comtrade; HS 1001; export earnings

1. Introduction

Kazakhstan's wheat exports link an agricultural producer in northern Central Asia to a concentrated set of destination markets. During 2019–2024, the value of those exports nearly doubled before falling substantially from its 2022 peak. That aggregate trajectory leaves a substantive question unresolved: did the decline affect the established regional buyers and other destinations to the same extent, or did it change the distribution of export earnings?

The distinction matters because a destination's share can rise while the value of shipments to it falls. A higher concentration ratio can therefore describe the relative persistence of large markets during contraction. It need not indicate expansion in those markets. Equally, entry into an annual top-five list can reflect a temporary large order or changes elsewhere in the distribution. A six-year comparison of levels, shares and ranks makes these different outcomes visible.

Research on the 2022 grain-market shock emphasizes disrupted Black Sea trade, high prices and risks to import-dependent countries. Glauben and colleagues discuss possible price spillovers to Central Asia and Afghanistan, including countries whose main suppliers lie outside Russia and Ukraine (Glauben et al., 2022). Country reporting supplies a complementary perspective. USDA's April 2025 Kazakhstan report

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describes production, grain quality, transit difficulties and support for exports (United States Department of Agriculture, Foreign Agricultural Service, 2025). These sources establish relevant market conditions. The bilateral export record addresses a separate empirical issue: how Kazakhstan's recorded earnings were distributed across destinations through the expansion and contraction.

This paper compares Kazakhstan-reported HS 1001 exports for the calendar years 2019–2024. It combines annual value and net weight, destination rankings, the share of Uzbekistan and Tajikistan, and the contribution of other destinations to the 2023–2024 decline. The main finding is a persistent regional core and a much sharper contraction outside it. Uzbekistan and Tajikistan remained the two largest destinations in every year, while their combined share reached 75.0% in 2024. Their absolute purchases nevertheless fell from 2023. The increase in concentration thus records uneven contraction across destinations.

2. Sector and market context

USDA identifies Akmola, Kostanay and North Kazakhstan as the three main wheat-producing regions, accounting for around 80% of national wheat production. Its April 2025 report estimates a 16.5-million-tonne harvest in marketing year 2024/25, 26% above the previous marketing year. It describes delayed planting after the May 2024 floods, favourable subsequent growing conditions, and later weather that reduced quality more than quantity (United States Department of Agriculture, Foreign Agricultural Service, 2025). This provides context for separating production, quality and exports rather than reading a lower calendar-year export value as direct evidence of a smaller harvest.

The same report discusses transport difficulties and a 2025 transport-subsidy programme. These observations demonstrate that market access and shipment costs were policy concerns. They do not identify the routes, costs or contracts underlying each 2019–2024 partner row. The present analysis therefore uses the report as sector context while deriving destination outcomes from Kazakhstan's declared trade record. Calendar-year HS 1001 exports also differ in timing and product coverage from marketing-year estimates that include wheat flour.

3. Data and method

3.1. Coverage and data vintage

The source is six retained UN Comtrade responses for exports declared by Kazakhstan, reporter code 398, under HS 1001, for 2019–2024 (United Nations Statistics Division, 2026). The project's extraction record gives an access date of 20 February 2026. The analysis preserves those JSON files and their original values; no current query is substituted for the retained responses.

The project specifies an evidence cutoff of 20 November 2025. The retained February 2026 live-database extract has not been matched to an independently preserved pre-cutoff edition. Consequently, the results describe that retained 2026 vintage, and identical historical availability at the stated cutoff remains unverified. This distinction applies to the dataset as a whole. A small partner count or a falling total does not by itself demonstrate incomplete reporting in 2024.

HS 1001 covers wheat and meslin. At the six-digit level, the classification distinguishes durum wheat for seed (100111), other durum wheat (100119), other wheat and meslin for seed (100191), and other non-seed wheat and meslin (100199) (United Nations Statistics Division, 2017). This study retains the four-digit aggregate. Flour is outside that heading; wheat subtype and grade are not separately analysed.

3.2. Record selection and aggregation

The retained observations satisfy partner2Code = 0, customsCode = C00 and motCode = 0. World aggregate rows (partnerCode = 0) are used for reconciliation and excluded from the partner sum. The selection rule also excludes the reporter's own code, 398; no such row occurs under this exact filter in

any of the six retained files. Every included partner has positive primaryValue. There is one selected row per partner and year, so mode-specific and alternative customs or second-partner records are not added to aggregate records.

Partner labels follow the UN country-code mapping (United Nations Statistics Division, n.d.). The count is a count of positive-value partner records, regardless of shipment size. All selected partners enter the totals and ranks. Annual partner sums reconcile with the matching World value and net-weight rows to numerical precision in the retained files. This establishes internal aggregation consistency, rather than independently confirming the completeness of the reporting country's declarations.

The Comtrade methodological guide defines the primary export value on an FOB basis and treats the first export partner as the last known destination (United Nations Statistics Division, 2019). The analysis therefore concerns declared destinations, not traced shipment routes or the final consumer of the grain. Values are in nominal US dollars. Net weight is taken directly from netWgt, in kilograms, and divided by 1,000 for tonnes.

3.3. Comparison measures

Annual unit value is total declared value divided by total net weight in tonnes. It is an aggregate value per tonne, affected by the composition of wheat and destinations. It does not isolate a constant-quality transaction price.

For each year, destinations are ranked by declared value. Let V_t be the total, C_t the sum for Uzbekistan and Tajikistan, and $O_t = V_t - C_t$ the sum for all other destinations. The core share is $100C_t/V_t$. Unlike a partner count, this ratio weights destinations by their economic scale.

The 2023–2024 change is separated into the two groups using the identity $\Delta V = \Delta C + \Delta O$. The other-destination contribution to the decline is

$$D_O = 100\frac{O_{2023} - O_{2024}}{V_{2023} - V_{2024}}. \quad (1)$$

The denominator is the positive decline in total export value, not the earlier year's export level. This is an accounting contribution to the observed change; it does not identify a demand, supply or policy effect.

4. Annual export performance

Table 1. Kazakhstan's declared wheat exports, 2019–2024.

Year	Value (USD)	Net weight (t)	Unit value (USD/t)
2019	1,002,575,816	5,261,642	190.5
2020	1,146,465,525	5,228,612	219.3
2021	1,425,172,306	5,746,678	248.0
2022	1,913,243,426	6,325,012	302.5
2023	1,852,685,643	7,202,626	257.2
2024	1,121,911,091	5,906,689	189.9

Source. calculations from retained UN Comtrade responses (United Nations Statistics Division, 2026). The exact filter is specified in Section 3.2; all calculations use unrounded values.

Export value rose from USD 1.003 billion in 2019 to USD 1.913 billion in 2022, an increase of 90.8%. Over the same interval, net weight increased by 20.2% and unit value by 58.7%. The 2022 value peak therefore coincided with increases in both the quantity shipped and the aggregate value per tonne. Its timing is consistent with the wider grain-market disruption discussed in the literature, without establishing how much of Kazakhstan's increase was attributable to that disruption (Glauben et al., 2022).

In 2023, net weight reached the study-period maximum of 7.203 million tonnes, while unit value fell to USD 257.2 per tonne. Export value consequently declined by only 3.2% from 2022. In 2024, net weight fell by 18.0% relative to 2023, to 5.907 million tonnes, and unit value fell further to USD 189.9 per tonne. The resulting export value of USD 1.122 billion was 41.4% below the 2022 peak and 11.9% above 2019.

The 2024 unit value was close to the 2019 value of USD 190.5 per tonne. This numerical resemblance does not establish that constant-quality prices returned to an earlier equilibrium: the aggregate combines wheat types, qualities and destination mixes. The substantive outcome is that the higher receipt per tonne observed in 2022 was not sustained in the later annual totals.

5. Destination structure

Table 2. Five largest destinations by declared value, 2019–2024 (USD million).

Year	1st	2nd	3rd	4th	5th
2019	UZ 371.1	TJ 197.4	CN 90.8	AF 57.4	TM 47.3
2020	UZ 599.0	TJ 235.7	AF 116.9	RU 67.1	CN 55.4
2021	UZ 623.5	TJ 239.7	IR 147.2	AF 131.3	TM 70.1
2022	UZ 824.2	TJ 309.7	AF 193.9	IR 185.1	TM 123.0
2023	UZ 798.1	TJ 261.2	TM 176.9	IT 174.0	CN 147.0
2024	UZ 587.3	TJ 253.7	CN 114.0	IT 56.9	AF 42.4

Source. retained UN Comtrade responses (United Nations Statistics Division, 2026). UZ = Uzbekistan; TJ = Tajikistan; CN = China; AF = Afghanistan; TM = Turkmenistan; IR = Iran; RU = Russia; IT = Italy. Values are independently rounded to one decimal place.

5.1. The two leading regional buyers

Uzbekistan ranked first in every year. Its purchases increased from USD 371.1 million in 2019 to USD 824.2 million in 2022, then declined to USD 587.3 million in 2024. The fall from the peak was 28.75%, while the full-period increase was 58.2%. Its share rose from 37.0% in 2019 to 52.3% in 2024. A larger share thus coexisted with purchases below the 2022 peak.

Tajikistan ranked second throughout. Purchases increased from USD 197.4 million in 2019 to USD 309.7 million in 2022 and stood at USD 253.7 million in 2024, a 28.5% increase over 2019. Its share ranged from 14.1% in 2023 to 22.6% in 2024. Together, the two countries received a larger share of Kazakhstan's exports even though both bought less, in nominal dollars, in 2024 than in 2023.

5.2. Changes among other regional destinations

Afghanistan ranked among the top five in 2019–2022 and 2024. It was sixth in 2023, when purchases were USD 110.1 million. Its peak was USD 193.9 million in 2022; the 2024 value of USD 42.4 million was 21.9% of that peak. Its return to fifth place in 2024 thus accompanied a further fall in value.

Turkmenistan was a top-five destination in 2019 and 2021–2023. It ranked seventh in 2020 at USD 12.0 million and eighth in 2024 at USD 8.6 million. Its purchases peaked at USD 176.9 million in 2023, when it ranked third, before falling sharply the following year. Its changing position contributed to turnover below the stable first two ranks.

Iran ranked third in 2021 at USD 147.2 million and fourth in 2022 at USD 185.1 million. It remained an observed destination in 2023, ranked eleventh with USD 18.4 million. There is no matching positive-value partner record for Iran in the retained 2024 selection. Its exit from the top five therefore preceded its absence from the selected annual records.

5.3. Italy, China and Russia

Italy first entered the annual top five within this study window in 2023, ranking fourth with USD 174.0 million and a 9.4% share. It remained fourth in 2024, despite purchases falling by 67.3% to USD 56.9 million, or 5.1% of the total. Italy already had purchases in earlier years of the retained data; top-five entry is not the beginning of the commercial relationship. The country retained a high rank because the distribution below the two main regional buyers was also changing.

China appeared among the top five in 2019, 2020, 2023 and 2024, ranking third in the first and last years. It ranked eighth in 2021 and tenth in 2022, when several destinations exceeded its value. Purchases reached USD 147.0 million in 2023 and fell to USD 114.0 million in 2024. Its share nevertheless increased from 7.9% to 10.2% over those two years.

Russia appeared in the top five only in 2020, ranked fourth with USD 67.1 million. Its recorded value was USD 1.2 million in 2023 and USD 0.34 million in 2024. These partner values establish a smaller role as a destination in the later years.

5.4. Concentration during contraction

Table 3. Partner counts and export value to the regional core and other destinations.

Year	Partners	Core value (USD million)	Other value (USD million)	Core share (%)
2019	26	568.5	434.0	56.7
2020	19	834.6	311.8	72.8
2021	23	863.3	561.9	60.6
2022	23	1,133.9	779.3	59.3
2023	24	1,059.3	793.4	57.2
2024	17	841.0	281.0	75.0

Source. calculations from retained UN Comtrade responses (United Nations Statistics Division, 2026). The core comprises Uzbekistan and Tajikistan. "Other" includes every other selected destination. Values are in current USD million; count gives positive-value partners, not a threshold for commercial significance.

The partner count moved from 26 in 2019 to 19 in 2020, then to 23, 23, 24 and 17. In particular, the count increased from 2022 to 2023. The core share was also non-monotonic: 56.7% in 2019, 72.8% in 2020, 60.6% in 2021, 59.3% in 2022, 57.2% in 2023 and 75.0% in 2024. The strongest increase occurred in the final year, rather than as a steady six-year trend.

Between 2023 and 2024, value associated with Uzbekistan and Tajikistan fell from USD 1,059.3 million to USD 841.0 million, a decline of 20.6%. Other destinations fell from USD 793.4 million to USD 281.0 million, or 64.6%. Of the USD 730.8 million total decline, USD 512.5 million, or 70.1%, was associated with other destinations. The two regional buyers' rising share therefore primarily reflects the much larger proportional contraction outside the core.

The longer comparison reinforces the distinction. Export value to the core in 2024 was 47.9% above 2019, while value to other destinations was 35.3% below 2019. The top four destinations in 2024—Uzbekistan, Tajikistan, China and Italy—accounted for 90.2% of the total. Both the group-level comparison and individual ranks locate the concentration in a small set of destinations.

6. Discussion

6.1. A persistent core and a more variable set of secondary destinations

The stable first and second ranks contrast with large changes elsewhere. Italy's top-five entry, Iran's drop to eleventh in 2023, and Turkmenistan's move from third to eighth between 2023 and 2024 show how quickly the secondary-destination distribution changed. These shifts qualify a simple diversification

narrative. Participation by a European buyer increased the geographic range of the leading destinations, but did not prevent a higher combined share for Uzbekistan and Tajikistan in 2024.

The contribution calculation provides the substantive link between export contraction and concentration. A 75.0% core share might otherwise be read as stronger purchases by those two countries. Their combined value actually fell by 20.6% from 2023; the rest fell by 64.6%. Concentration increased because the core retained more of its previous value. This distinction matters for interpreting exporter exposure: a narrower earnings base can emerge while all major groups experience declines.

6.2. Implications for interpreting export-market development

Annual rankings are informative about scale, but persistence requires examining the levels behind them. Italy illustrates the point particularly clearly: it stayed fourth after losing two-thirds of its recorded value. A ranking-based description would suggest stability; the dollar series shows a sharp contraction. Conversely, China's larger 2024 share accompanied lower absolute value. Monitoring export-market development therefore benefits from tracking values and shares together.

For Kazakhstan, the two regional buyers remained central to export earnings throughout the period. The contraction outside that core demonstrates that occasional large purchases elsewhere had not produced a broadly distributed earnings base by 2024. This is an outcome in the declared destination portfolio, not a test of any particular corridor's profitability. The record contains no matched transport distances, freight bills or contract terms with which to establish a geographic competitiveness boundary.

The results also distinguish exporter concentration from importer dependence. The finding that Uzbekistan and Tajikistan took 75.0% of Kazakhstan's recorded exports does not mean that Kazakhstan supplied 75.0% of their imports or consumption. Those are different denominators requiring importer-side data. The present comparison directly informs Kazakhstan's distribution of export earnings; the food-security literature supplies broader context for why reliable regional grain trade matters (Glauben et al., 2022).

6.3. Contribution relative to market reporting

The contribution is the joint evidence on stable leading destinations, volatile secondary ranks and the unequal contraction of the two groups. Global grain-market analysis describes the shock environment, while country reports address production and trade conditions (Glauben et al., 2022; United States Department of Agriculture, Foreign Agricultural Service, 2025). The retained bilateral series adds a consistent calendar-year destination comparison, including the exact accounting share of the decline outside the regional core. It establishes where recorded earnings contracted; causal explanations for contracts, policy or prices require different evidence.

7. Interpretation and coverage

The analysis measures nominal declared export value and net weight for HS 1001. Aggregate unit values combine quality and product composition with transaction values. The data identify declared partners rather than routes, final consumers, household welfare or the production origin of every shipment. Partner counts give equal weight to a very small shipment and a large market; value shares provide the complementary measure of scale.

The most important provenance issue is temporal: the retained extract is documented as February 2026, whereas the specified evidence cutoff is November 2025. Its numerical availability at that earlier date has not been established. Database revisions may alter the annual totals or ranks. All reported calculations are reproducible from the retained files, and the concentration result is a result for that version rather than a claim that the same information was already available in November 2025.

8. Conclusion

Kazakhstan's recorded wheat export earnings fell by 41.4% from the 2022 peak to USD 1.122 billion in 2024, while remaining 11.9% above their 2019 level. Uzbekistan and Tajikistan held the first two destination ranks in every year and increased their combined share from 56.7% in 2019 to 75.0% in 2024.

The final-year concentration increase occurred during contraction in both destination groups. Export value to the core fell by 20.6% from 2023, while value to other destinations fell by 64.6% and accounted for 70.1% of the total decline. Italy stayed fourth despite a 67.3% fall in value; Iran remained present at a much smaller value in 2023; and Turkmenistan moved from third in 2023 to eighth in 2024. The defining result in the retained record is a persistent regional core alongside a more variable and sharply contracting set of secondary destinations.

9. Data availability

The six original Comtrade responses, selection rules, partner-level records and calculation scripts are retained with the research materials. The files document the analysed vintage; their actual recorded 2026 access date is preserved.

Statements

Data availability. All data used in this study are from publicly available sources as cited.

AI use. Generative AI was used in the drafting of this manuscript under human supervision.

Funding. This work received institutional support from the Academy of Public Policy and Economics (APPE).

Competing interests. The authors are affiliated with APPE, which operates this journal. No external competing interests are declared.

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