



GIEWS Country Brief The Republic of Kazakhstan

Reference Date: 27-April-2023

FOOD SECURITY SNAPSHOT

- Favourable production prospects for 2023 minor winter wheat crop
- Above-average cereal production obtained in 2022
- Wheat exports forecast at above-average level in 2022/23
- Retail prices of wheat higher year-on-year

Favourable production prospects for 2023 minor winter wheat crop

Harvesting of the 2023 minor wheat crop, which was planted in October 2022 in the main producing southern regions, is expected to take place between June and August 2023. Weather conditions have been overall favourable during the season and, as of mid-April, vegetation conditions were at near-average levels. Planting of the main spring wheat crop is expected to start in May 2023 in the key producing northern provinces and crops will be harvested from mid-August.

According to the Ministry of Agriculture, the total area planted with wheat in 2021 is expected to increase by about 100 000 hectares compared to the previous year.

Above-average cereal production obtained in 2022

The total 2022 wheat production, including winter and spring crops, is estimated at 16.4 million tonnes, well above the five-average level and 39 percent more than the previous year, due to favourable weather conditions. The 2022 barley output is estimated at an above-average level of 3.3 million tonnes also due to good weather conditions. The total cereal production in 2022 is estimated at a above-average level of 21.5 million tonnes.

Wheat exports forecast at above-average level in 2022/23

Total cereal exports in the 2022/23 marketing year (July/June) are forecast at about 10 million tonnes, 10 percent above the average volume. Wheat exports are forecast at an above-average level of 9.5 million tonnes, amid the bumper production obtained in 2022 and strong export demand. By contrast, barley exports are projected at 600 000 tonnes, well below the average volume.

Kazakhstan

Crop Calendar

(*major foodcrop)

Barley and maize (Spring)
Wheat* (Spring)
Wheat (Winter)



Sowing
Growing
Harvesting

Kazakhstan

Cereal Production

	2017-2021 average	2021	2022 estimate	change 2022/2021
	000 tonnes			percent
Wheat	13 255	11 814	16 400	38.8
Barley	3 427	2 367	3 300	39.4
Maize	926	1 130	950	-15.9
Others	930	848	806	-4.9
Total	18 538	16 158	21 456	32.8

Note: Percentage change calculated from unrounded data.

Retail prices of wheat higher year-on-year

National average retail prices of first grade wheat flour increased steeply from March to October 2022. From November 2022 onwards, prices remained overall stable. In January 2023, domestic retail prices of first grade wheat flour were 30 percent higher year-on-year.

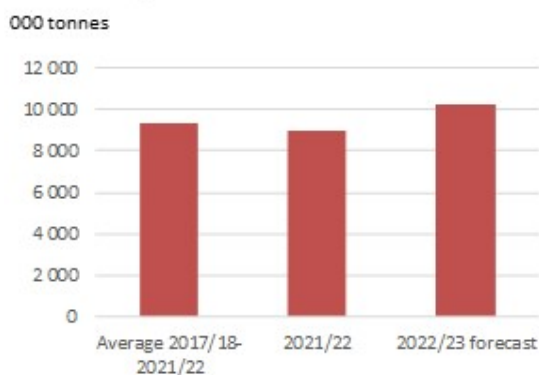
Retail prices of potatoes, another food staple in the country, decreased steeply between July and October 2022, and remained stable from November 2022 to January 2023, in line with seasonal patterns.

On 10 April 2023, the Ministry of Agriculture announced a [ban](#) on imports of wheat by road into the national territory for a period of six months. The aim is to support domestic farmers through stabilizing the price of locally produced wheat, which is facing strong competition from the lower prices of the grain exported by the Russian Federation.

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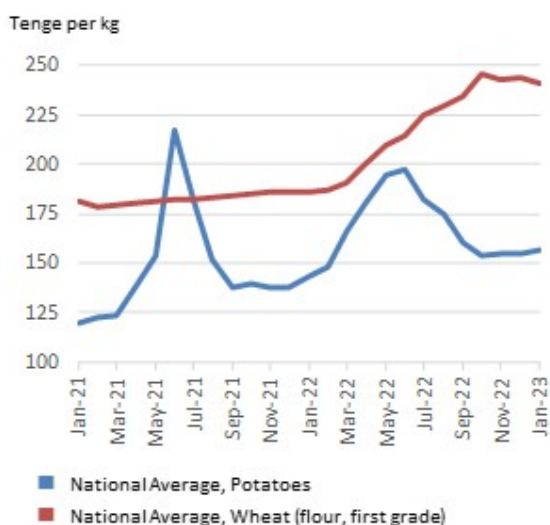
Cereals Exports



Notes: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Kazakhstan

Retail prices of potatoes and wheat flour



This brief was prepared using the following data/tools:

FAO/GIEWS Country Cereal Balance Sheet (CCBS) <https://www.fao.org/giews/data-tools/en/>.

FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool <https://fpma.fao.org/>.

FAO/GIEWS Earth Observation for Crop Monitoring <https://www.fao.org/giews/earthobservation/>.

Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.



GIEWS Country Brief Kazakhstan

Reference Date: 30-September-2022

FOOD SECURITY SNAPSHOT

- Near-average cereal production forecast in 2022
- Cereal exports in 2022/23 forecast slightly below average
- Retail prices of wheat higher year on year

Near-average cereal production forecast in 2022

Harvesting of the 2022 minor winter wheat crop was completed in August, while harvesting of the 2022 main spring wheat, barley and maize crops is ongoing under overall favourable weather conditions.

In the key wheat and barley producing northern regions, below-average precipitation amounts in July 2022 negatively affected soil moisture levels and resulted in below-average vegetation conditions in some crop lands (ASI map early August, right before the harvest).

The total 2022 wheat production, including winter and spring crops, is forecast at a near-average level of 13.2 million tonnes, despite the large plantings, as the unfavourable weather conditions negatively affected yields. The 2022 barley output is forecast at 3 million tonnes, about 10 percent below the five-year average level due to a gradual decline in plantings in recent years and the impact of dry weather conditions. Total cereal production is forecast at a near-average level of 18 million tonnes.

Planting of the 2023 winter wheat crop is expected to take place in October and November in the main producing southern regions.

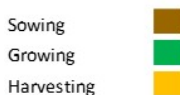
Cereal exports in 2022/23 forecast slightly below average

Total cereal exports in the 2022/23 marketing year (July/June) are forecast at about 9 million tonnes, 5 percent below the average volume. Wheat exports are forecast at a near-average level of 8 million tonnes, amid the average output expected in 2022 and the steady demand by importing countries. By contrast, barley exports are projected at 600 000 tonnes, well below the

Kazakhstan

Crop Calendar

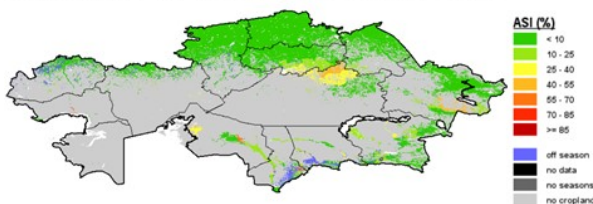
(*major foodcrop)



Source: FAO/GIEWS.

Kazakhstan - Agricultural Stress Index (ASI)

from start of season 1 to dekad 1, August 2022



Source: FAO/GIEWS Earth Observation System.

Kazakhstan

Cereal Production

	2017-2021 average	2021	2022 forecast	change 2022/2021
	000 tonnes			percent
Wheat	13 255	11 814	13 200	11.7
Barley	3 427	2 367	3 000	26.8
Maize	926	1 130	950	-15.9
Others	930	848	875	3.2
Total	18 538	16 158	18 025	11.6

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

average volume.

On 13 September 2022, the government [announced](#) the immediate suspension of wheat and wheat flour export quotas. The restrictions had been originally introduced on 14 April until 15 June 2022 and later extended through 30 September 2022 ([FPMA Policy](#)).

Retail prices of wheat higher year on year

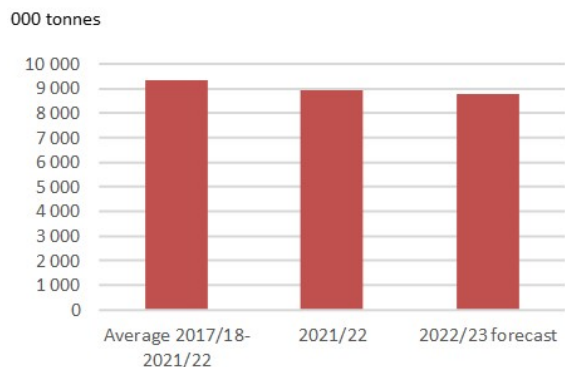
National average retail prices of first grade wheat flour remained overall stable or increased slightly between February 2021 and February 2022. From March 2022 onwards, prices increased steeply in line with seasonal trends, with further upward pressure provided by the introduction, on 14 March 2022, of a temporary ban of exports of wheat and other cereals from the Russian Federation to the countries within the Eurasian Economic Union ([FPMA Policy](#)). In August 2022, domestic retail prices of first grade wheat flour were 25 percent higher year on year.

Retail prices of potatoes, another food staple in the country, increased steeply between February and June 2022, and declined sharply in July and August, in line with the season's patterns.

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Cereals Exports

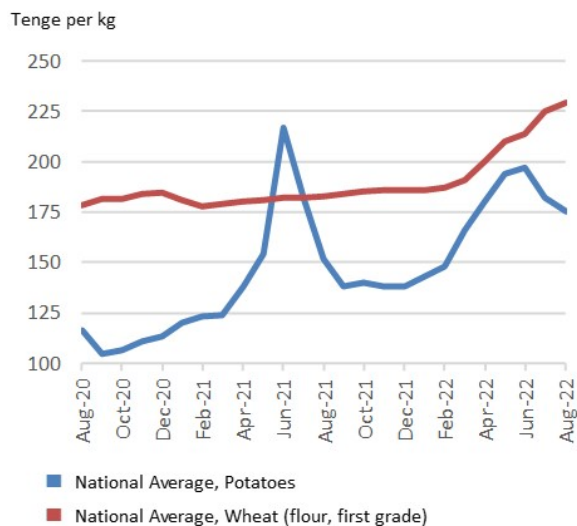


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Kazakhstan

Retail prices of potatoes and wheat flour



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIIEWS Country Brief Kazakhstan

Reference Date: 23-December-2021

FOOD SECURITY SNAPSHOT

- Below-average cereal production obtained in 2021
- Cereal exports forecast at below-average level in 2021/22
- Export prices of wheat higher year on year following reduced harvest

Below-average cereal production obtained in 2021

Harvesting of the 2021 minor winter wheat crop was completed in August, while harvesting of the 2021 main spring wheat, barley and maize crops finalized in October.

Total 2021 cereal production is estimated at about 17 million tonnes, 12 percent below average due to reduced wheat and barley outputs, set at about 12 million tonnes and 3 million tonnes, respectively, well below the five-year average levels. The result is mainly due to insufficient precipitation amounts and higher-than-average temperatures between April and August 2021, which negatively affected yields in key wheat and barley producing northern regions. By contrast, production of maize is estimated at an above-average level of 1.2 million tonnes due to large plantings and overall conducive weather conditions during the season.

Planting of the minor 2022 winter wheat crop took place in October and November in the main producing southern regions, under overall favourable weather conditions. Winter wheat output amounts, on average, at 3.5 percent of the total annual wheat production and crops will be harvested between June and August next year.

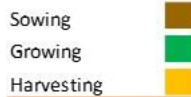
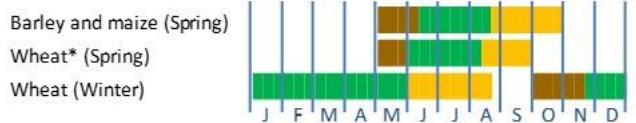
Cereal exports forecast at below-average level in 2021/22

Total cereal exports in the 2021/22 marketing year (July/June) are forecast at about 7.5 million tonnes, 10 percent below the average volume. Wheat exports are officially forecast at a below-average level of 6.5 million tonnes, due to the reduced output obtained in 2021. Similarly, barley exports are projected at 800 000 tonnes, well below the five-year average volume.

Kazakhstan

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Kazakhstan

Cereal Production

	2016-2020 average	2020	2021 estimate	change 2021/2020
	000 tonnes			percent
Wheat	13 889	14 258	11 800	-17.2
Barley	3 599	3 659	3 000	-18.0
Maize	853	958	1 170	22.1
Others	958	912	960	5.3
Total	19 299	19 787	16 930	-14.4

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Export prices of wheat higher year on year following reduced harvest

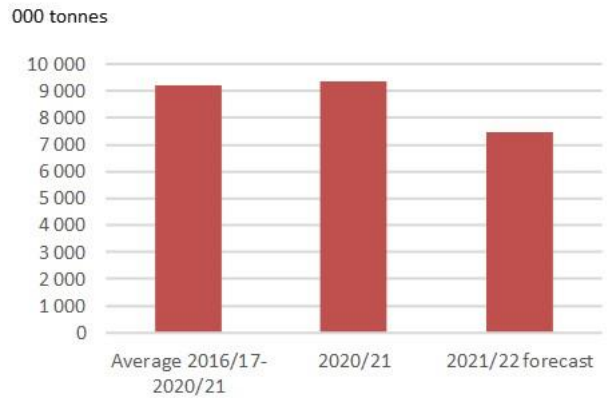
Export prices of milling quality wheat increased sharply between June and October 2021, reaching the highest levels on record since March 2013. The price increase was supported by the expectation of a reduced domestic wheat output in 2021 and influenced by rising international prices. In November, export prices started to decline in the country, mainly due to weak import demand, but were still over 20 percent above their levels a year before.

In domestic markets, retail prices of first grade wheat flour remained overall stable or increased slightly since July 2021 and, in November, they were near their year-earlier levels.

Retail prices of potatoes, another food staple in the country, declined sharply between June and September 2021, in line with seasonal trends and remained stable in October and November.

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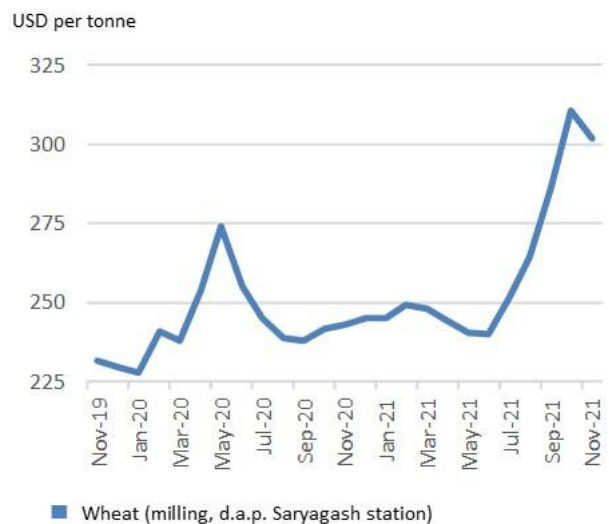
Cereals Exports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

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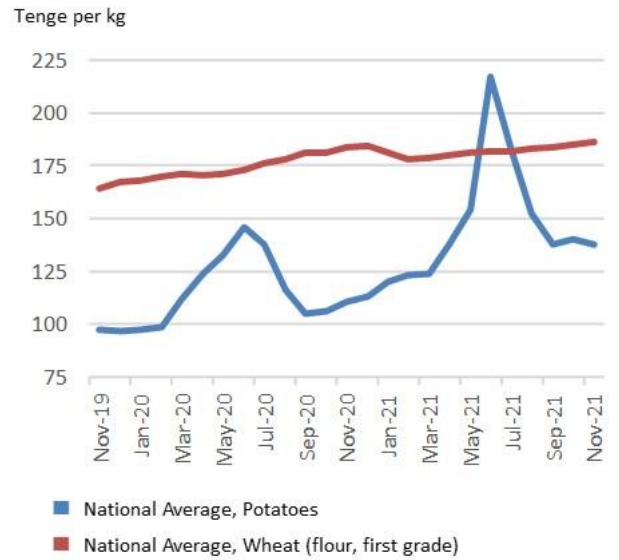
Export prices of milling wheat



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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Retail prices of potatoes and wheat flour



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Kazakhstan

Reference Date: 28-July-2021

FOOD SECURITY SNAPSHOT

- Unfavourable weather conditions expected to curb yields of wheat and barley in 2021
- Cereal exports forecast slightly below-average level in 2021/22
- High prices of potatoes in June due to very low availabilities in most markets

Unfavourable weather conditions expected to curb yields of wheat and barley in 2021

Harvesting of the 2021 minor winter wheat crop is ongoing, while planting of the 2021 main spring wheat and barley crops, to be harvested from mid-August, finalized in early June.

Below-average precipitation amounts and warmer-than-average temperatures since May negatively affected soil moisture levels and resulted in below-average vegetation conditions in northern areas of the country, including parts of the key spring wheat and barley producing Kostanay and Akmola provinces (ASI map). The 2021 wheat and barley outputs are forecast at 13 million tonnes and 3.3 million tonnes, respectively, slightly below the five-year average levels as unfavourable weather conditions are expected to curb yields.

The total 2021 cereal production is forecast at about 18 million tonnes, 5 percent below average.

Cereal exports forecast slightly below-average level in 2021/22

Total cereal exports in the 2021/22 marketing year (July/June) are forecast at about 8.8 million tonnes, slightly below the average volume. Wheat exports are forecast at a near-average level of 7.5 million tonnes, despite the reduced output expected in 2021 due to the steady demand by importing countries. Barley exports are projected at 1.2 million tonnes, about 5 percent below the five-year average volume.

High prices of potatoes in June due to very low availabilities

Export prices of milling quality wheat have been declining since February 2021 and, in June, they were near their levels in the corresponding month a year before.

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Crop Calendar

(*major foodcrop)

Barley (Spring)

Wheat* (Spring)

Wheat (Winter)

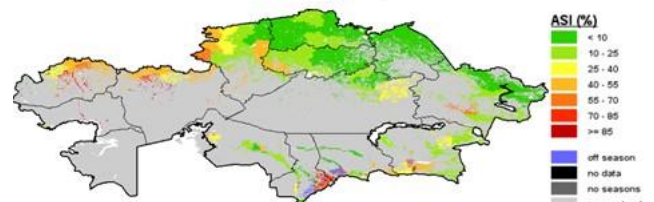


Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Kazakhstan - Agricultural Stress Index (ASI)

from start of season 1 to dekad 1, July 2021



Source: FAO/GIEWS Earth Observation System.

Kazakhstan

Cereal Production

	2016-2020	2020	2021	change
	average		forecast	2021/2020
000 tonnes				
percent				
Wheat	13 889	14 258	13 000	-8.8
Barley	3 599	3 659	3 300	-9.8
Maize	853	958	950	-0.8
Others	958	912	915	0.3
Total	19 299	19 787	18 165	-8.2

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

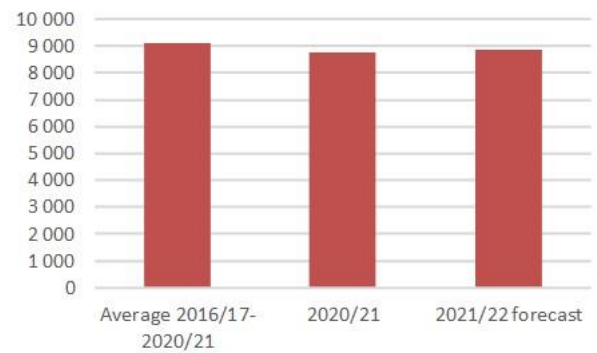
In the domestic market, retail prices of first grade wheat flour have been slightly increasing since February 2021, in line with seasonal trends and, in June, they were on average 5 percent higher than a year earlier.

Retail prices of potatoes, another food staple in the country, have been seasonally increasing since October 2020, rising sharply in May and June 2021, ahead of the 2021 harvest. In June, prices were almost 50 percent above their values a year before due to very low availabilities in most markets.

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Cereals Exports

000 tonnes



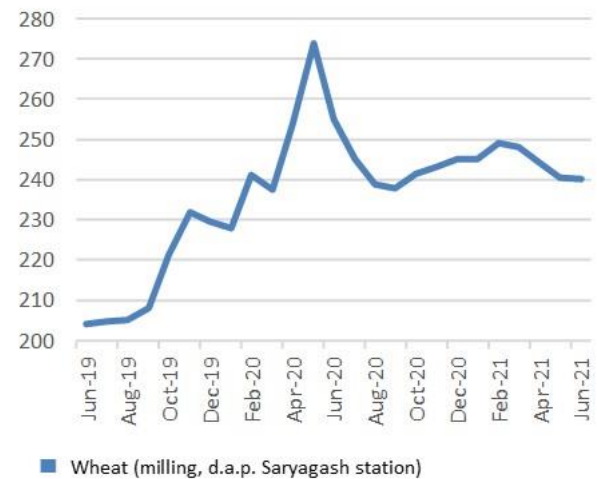
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

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Export prices of milling wheat

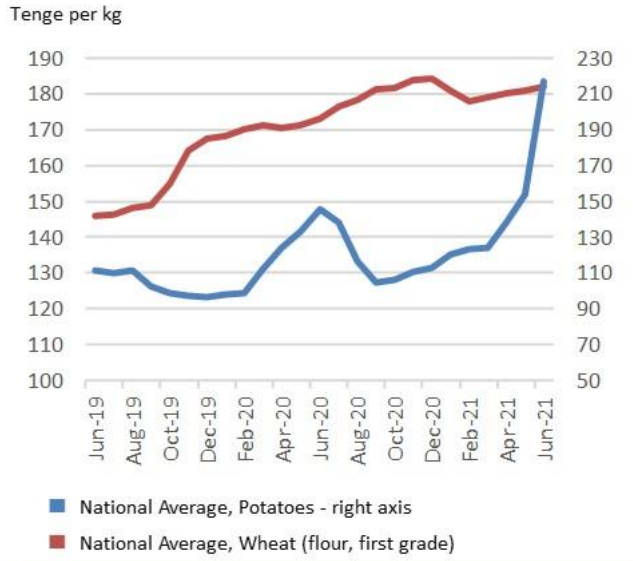
USD per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

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Retail prices of potatoes and wheat flour



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Kazakhstan

Reference Date: 26-April-2021

FOOD SECURITY SNAPSHOT

- Favourable weather conditions for 2021 winter wheat crop
- Above-average cereal production obtained in 2020
- Cereal exports forecast at slightly below-average level in 2020/21
- Export prices of milling wheat remained quite stable since September 2020

Favourable weather conditions for 2021 winter wheat crop

Harvesting of the 2021 minor winter wheat crop, which was planted in October and November last year in the main producing southern regions, is expected to take place between June and August. Weather conditions have been overall favourable during the season and, as of mid-April, vegetation conditions were at near-average levels.

Planting of the main spring wheat crop is expected to start in May in the key producing northern provinces and crops will be harvested from mid-August. The spring wheat output amounts, on average, to over 95 percent of the total annual wheat production in the country.

Above-average cereal production obtained in 2020

Harvesting of the 2020 cereal crops was completed last October and the aggregate production is estimated at about 19.8 million tonnes, 5 percent above the five-year average level. The result is on account of above-average outputs of wheat, barley and maize, officially estimated at about 14.3 million tonnes, 3.7 million tonnes and 958 000 tonnes, respectively, mainly due to large plantings.

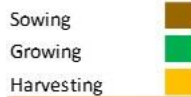
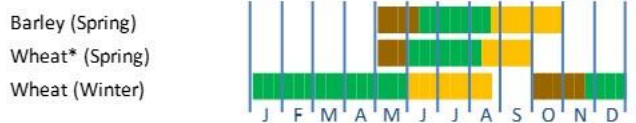
Cereal exports forecast at slightly below-average level in 2020/21

Total cereal exports in the 2020/21 marketing year (July/June) are forecast at about 8.6 million tonnes, 5 percent below the average volume. Wheat exports are forecast at 7.5 million tonnes, slightly below the five-year average volume. Barley exports are projected at a well below-average level of 1 million tonnes due to weak demand from importing countries and increased domestic demand for feed barley in order to compensate for the limited availabilities of feed wheat.

Kazakhstan

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS.

Kazakhstan

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Wheat	13 787	11 452	14 256	24.5
Barley	3 403	3 830	3 659	-4.5
Maize	808	896	958	6.9
Others	932	947	912	-3.7
Total	18 930	17 124	19 785	15.5

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Export prices of milling wheat remained quite stable since September 2020

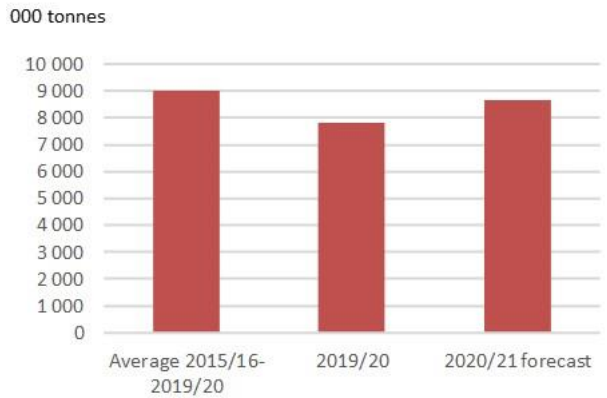
Export prices of milling quality wheat remained unchanged or increased slightly between September 2020 and February 2021, due to an overall stable demand for wheat grain and flour from importing countries. Prices declined moderately in March 2021 but remained about 5 percent above their levels in the corresponding month a year before.

In the domestic market, retail prices of first grade wheat flour followed an increasing trend over the last two years and, in March 2021, prices were on average 5 percent higher than a year earlier.

Retail prices of potatoes, another food staple in the country, seasonally increased since October 2020 and reached, in March 2021, levels about 10 percent above those in the corresponding month in 2019.

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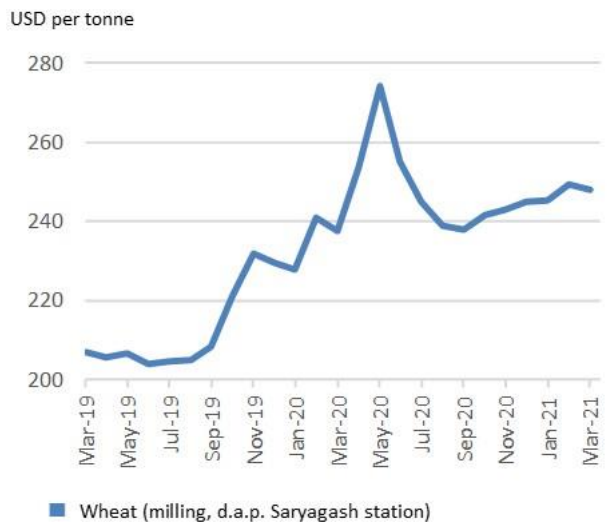
Cereals Exports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).
Source: FAO/GIEWS Country Cereal Balance Sheets.

Kazakhstan

Export prices of milling wheat

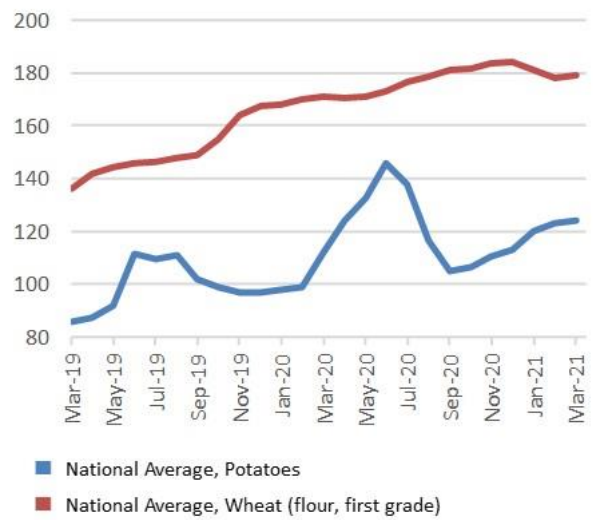


Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Kazakhstan

Retail prices of potatoes and wheat flour

Tenge per kg



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Kazakhstan

Reference Date: 17-December-2020

FOOD SECURITY SNAPSHOT

- Near-average cereal production obtained in 2020
- Cereal exports forecast below-average level in 2020/21
- Export prices of milling wheat remained quite stable since September 2020

Near-average cereal production obtained in 2020

Harvesting of the 2020 cereal crops was completed in October and the aggregate production is estimated at 18.6 million tonnes, slightly below the five-year average. The production of wheat is set at 12.5 million tonnes, 10 percent below average due to drier and warmer-than-average weather conditions in May and June, which negatively affected yields in some key wheat-producing northern regions. By contrast, the 2020 outputs of barley and maize are set at 4.1 million tonnes and 900 000 tonnes, respectively, well above the average levels mainly due to large plantings.

Planting of the 2021 minor winter wheat crop finalized in November in the main producing southern regions, under overall favourable weather conditions, except in some areas where frosts in late October hampered planting operations. Winter wheat output amounts, on average, to 3.5 percent of the total annual wheat production and crops will be harvested between June and August next year.

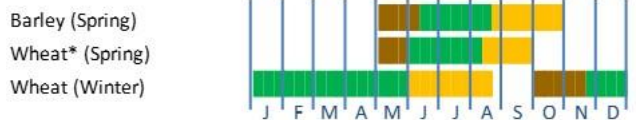
Cereal exports forecast below-average level in 2020/21

Total cereal exports in the 2020/21 marketing year (July/June) are forecast at about 7.7 million tonnes, well below the average volume. Wheat exports are forecast at 6.5 million tonnes, about 15 percent below the five-year average volume on account of the reduced outputs obtained in the last two years. Barley exports are projected at well a below-average level of 1 million tonnes, due to weak demand from importing countries and increased domestic demand for feed barley to compensate the limited availabilities of feed wheat.

Kazakhstan

Crop Calendar

(*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Kazakhstan

Cereal Production

	2015-2019 average	2019	2020 estimate	change 2020/2019
	000 tonnes			percent
Wheat	13 787	11 452	12 500	9.2
Barley	3 403	3 830	4 100	7.0
Maize	808	896	900	0.4
Others	932	947	1 088	14.9
Total	18 930	17 124	18 588	8.5

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Export prices of milling wheat remained quite stable since September 2020

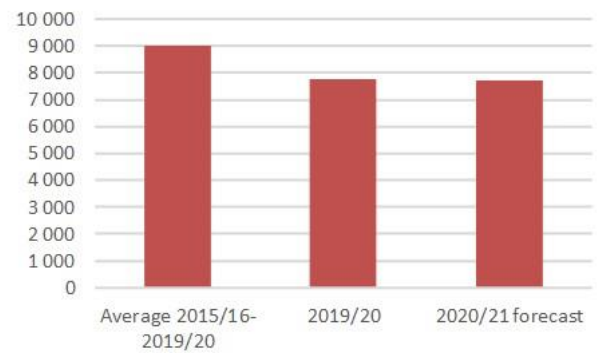
Export prices of milling quality wheat declined from May to August 2020, after the abolition of export quotas ([see FPMA Food Policy](#)) and remained unchanged or increased slightly between September and November, due to an overall stable demand for wheat grain and flour from importing countries. In the domestic market, retail prices of wheat flour followed an increasing trend over the last two years and, in November 2020, prices were about 10 percent higher than a year earlier.

Retail prices of potatoes, another food staple in the country, seasonally decreased between June and September 2020, due to increased market availabilities following the harvest of the 2020 tubers, and increased slightly in October and November, reaching levels of about 15 percent above those in the corresponding month in 2019.

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Cereals Exports

000 tonnes



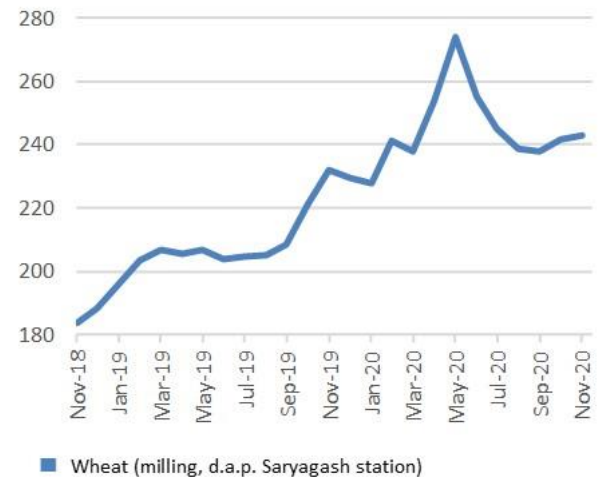
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Kazakhstan

Export prices of milling wheat

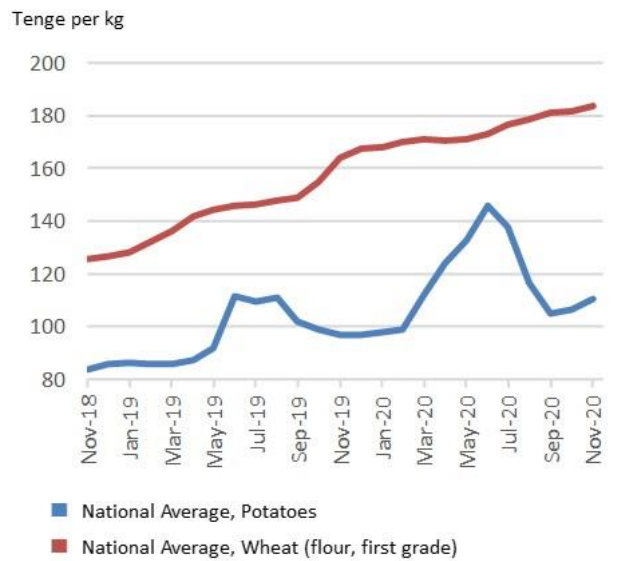
USD per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Kazakhstan

Retail prices of potatoes and wheat flour



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Kazakhstan

Reference Date: 31-August-2020

FOOD SECURITY SNAPSHOT

- Slightly below-average wheat production forecast in 2020
- Below-average cereal exports forecast in 2020/21
- Export prices of wheat in May reached highest levels since January 2015 and declined afterwards

Wheat production forecast slightly below-average in 2020

Harvesting of the 2020 wheat crop is underway and it is expected to be completed by the end of September. Despite the large plantings, the output is foreseen at 13 million tonnes, 5 percent below the five-year average, as drier and warmer-than-average weather conditions in May and June negatively affected crops in some regions.

By contrast, the 2020 outputs of barley and maize, harvesting of which is ongoing and is expected to finalize in October, are forecast at about 4 million tonnes and 900 000 tonnes, respectively, well above the average levels mainly due to large plantings.

Below-average cereal exports forecast in 2020/21

Total cereal exports in the 2020/21 marketing year (July/June) are forecast at 8.6 million tonnes, 4 percent below the average volume. Wheat exports are forecast at 7 million tonnes, about 8 percent below the five-year average volume on account of the reduced output expected in 2020. By contrast, barley exports are projected well above average, at 1.5 million tonnes.

In response to the COVID-19 pandemic and in order to ensure adequate domestic supplies, on 31 March 2020, the Ministry of Agriculture set the export quotas of wheat grain and wheat flour at 200 000 tonnes and 70 000 tonnes, respectively. In May 2020, the quotas were increased to 250 000 tonnes and 150 000 tonnes, respectively. Quotas were lifted in June 2020.

Export prices of wheat in May reached highest levels since January 2015 and declined afterwards

Export prices of milling quality wheat increased between March and May 2020 in line with the trends in the international market,

Kazakhstan

Crop Calendar (*major foodcrop)



Source: FAO/GIEWS.

Kazakhstan

Cereal Production

	2015-2019	2019	2020	change
	average			2020/2019
	000 tonnes			percent
Wheat	13 787	11 452	13 000	13.5
Barley	3 397	3 800	4 100	7.9
Maize	814	928	900	-3.0
Others	937	969	995	2.7
Total	18 934	17 149	18 995	10.8

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

reaching their highest levels since January 2015 due to the strong demand from importing countries, export restrictions and to the reduced domestic wheat output obtained in 2019. Prices declined in June and July, however, remained well above their year-earlier levels.

Domestic retail prices of wheat flour followed an increasing trend over the last two years and, in July 2020, were about 20 percent higher than a year earlier mostly due to the below-average domestic wheat output obtained in 2019.

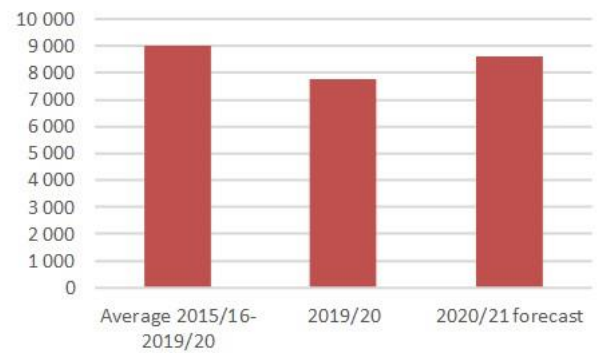
Retail prices of potatoes, another food staple in the country, seasonally increased between February and June 2020, with strong consumer demand amid concerns over the COVID-19 pandemic disrupting the supply chains and contributing to push prices at levels 30 percent above those in June a year before. Prices declined in July, with the arrival to the markets of the recently harvested 2020 tubers, but remained higher year on year.

To protect consumers in response to the COVID-19 pandemic, on 3 April 2020, the Government introduced [price ceilings](#) on nine food products considered “socially significant”, which, on 6 May, were increased to a total of 19, including wheat flour, bread, rice and sunflower oil. The price ceilings were suspended on 11 May with the end of the State of Emergency.

Kazakhstan

Cereals Exports

000 tonnes



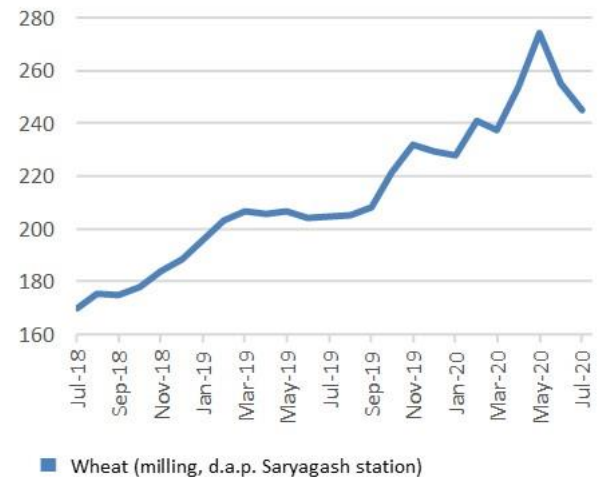
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Kazakhstan

Export prices of milling wheat

USD per tonne

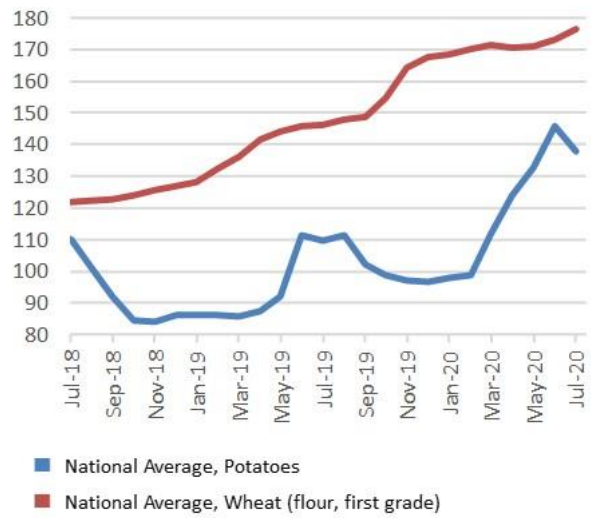


Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Kazakhstan

Retail prices of potatoes and wheat flour

Tenge per kg



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Kazakhstan

Reference Date: 22-May-2020

FOOD SECURITY SNAPSHOT

- Favourable production prospects for minor 2020 winter wheat crops
- Cereal production in 2019 estimated at below-average level
- Below-average exports forecast in 2019/20
- Export prices of wheat in April reached highest levels since February 2015

Favourable production prospects for minor 2020 winter wheat crops

Harvesting of the minor 2020 winter wheat crops (generally amounting to about 5 percent of the total annual wheat production) is expected to take place between June and September and crop conditions are favourable in southern Almaty, Zhambyl and South Kazakhstan provinces.

Planting of the main 2020 spring cereal crops is ongoing in the northern regions under favourable weather conditions and harvesting is expected to start in mid-August.

Cereal production in 2019 estimated at below-average level

Harvesting of the 2019 cereal crops was completed by last October and the aggregate production is estimated at 17.9 million tonnes, 5 percent below the five-year average. The result is on account of a reduced production of wheat, officially set at 11.5 million tonnes, about 18 percent below the average level, due to warmer and drier-than-average weather conditions between June and August 2019, which negatively affected yields in the key wheat-producing northern province of Kostanay. In addition, the area planted with wheat continued its declining trend, reflecting the Government's directive aiming at progressively reducing all wheat (spring and winter) planted area from 12.4 million hectares in 2016 to 10.1 million hectares in 2021 in favour of more profitable oil crops. Barley production is estimated at a bumper level of 4.5 million tonnes due to record plantings, officially set at 3 million hectares.

Below-average exports forecast in 2019/20

Total cereal exports in the 2019/20 marketing year (July/June), are forecast at about 8 million tonnes, 8 percent below the average level and a five-year low. Exports of wheat are forecast

Kazakhstan

Crop Calendar (*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Kazakhstan

Cereal Production

	2014-2018 average	2018	2019 estimate	change 2019/2018
	000 tonnes			percent
Wheat	14 096	13 947	11 452	-17.9
Barley	3 119	3 972	4 500	13.3
Maize	761	862	928	7.6
Others	891	969	969	0.0
Total	18 867	19 749	17 849	-9.6

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

at 6.5 million tonnes, 15 percent below the average volume due to the 2019 reduced domestic output. By contrast, barley exports are forecast well above the average at 1.3 million tonnes, amid bumper production and strong demand from the international markets.

In response to the COVID-19 pandemic (see box below), on 31 March 2020, the Ministry of Agriculture set the export quotas of wheat grain and wheat flour at 200 000 tonnes and 70 000 tonnes, respectively. These quotas were increased to 250 000 tonnes and 150 000 tonnes, respectively, in May. On 13 May 2020, the Ministry announced the abolition of export quotas starting from June 2020.

Export prices of wheat in April reached highest levels since February 2015

Export prices of milling quality wheat reached, in April 2020, levels about 20 percent above those of twelve months before and the highest since February 2015, due to the reduced domestic wheat output obtained. Prices increased in particular between March and April, in line with trends in the international market due to strong demand from importing countries.

In April 2020, domestic retail prices of wheat grain and wheat flour increased slightly or remained stable over the last two years and were about 20 percent higher than a year earlier due to the below-average domestic wheat output and amid a weaker local currency.

Retail prices of potatoes, another important staple, have been seasonally increasing since January 2020. In particular, prices increased in March and April due to strong demand by consumers amid the COVID-19 pandemic, which exacerbated seasonal trends.

In response to the COVID-19 pandemic (see box below), on 3 April 2020, the Government approved the introduction of price ceilings on nine socially-significant food products, which, on 6 May, were increased to a total of 19, including wheat flour, bread, rice and sunflower oil. The price ceilings were suspended on 11 May with the end of the State of Emergency.

COVID-19 and measures adopted by the Government

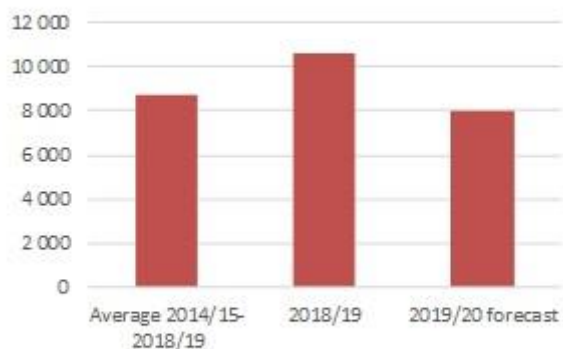
In response to the COVID-19 epidemic, on 15 March 2020, the Government declared a State of Emergency, restricting entry in and exit from the country, imposing quarantine measures and movement limitations within the country.

The Government also introduced a number of [economic measures](#), including a 10 percent increase in pension and social welfare payments; the allocation of [KZT 42 500](#) (about USD 102) per person per month, to self-employed and newly unemployed people; and a package of urgent anti-crisis measures to support small and medium-sized enterprises.

Kazakhstan

Cereals Exports

000 tonnes



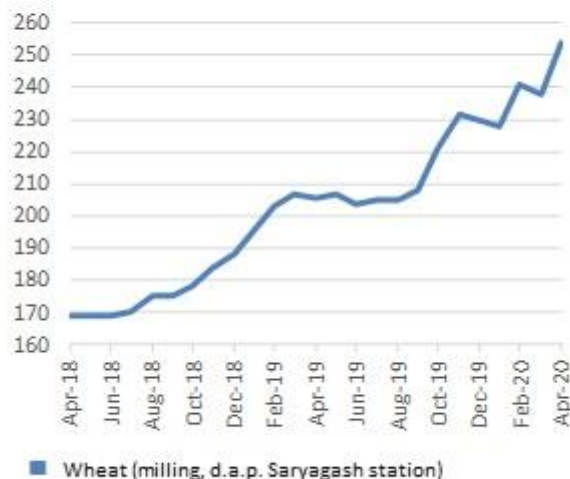
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Kazakhstan

Export prices of milling wheat

USD per tonne



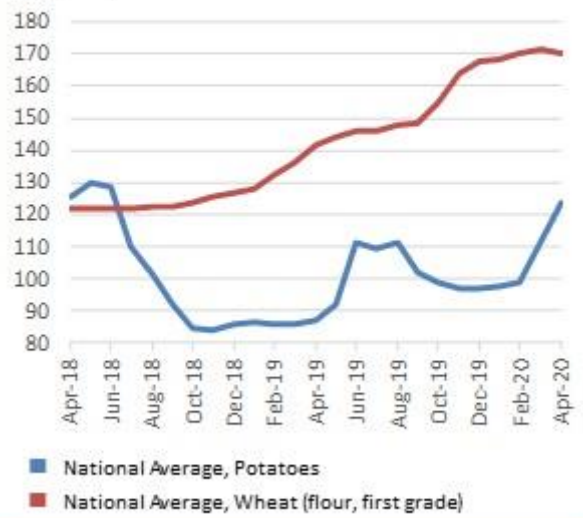
■ Wheat (milling, d.a.p. Saryagash station)

Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Kazakhstan

Retail prices of potatoes and wheat flour

Tenge per kg



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Kazakhstan

Reference Date: 04-November-2019

FOOD SECURITY SNAPSHOT

- Cereal production in 2019 estimated at below-average levels
- Below-average exports forecast in 2019/20
- Export prices of wheat increased in last two months

Cereal production in 2019 estimated at below-average levels

Harvesting of all the 2019 cereal crops was completed by end-October and the aggregate production is estimated at 17.9 million tonnes, 5 percent below the five-year average. The result is on account of a reduced production of wheat, set at 11.5 million tonnes, about 18 percent below the average due to warmer and drier-than-average weather conditions between June and August, which negatively affected yields in the key wheat-producing northern province of Kostanay. In addition, the area planted with wheat continued its declining trend, reflecting the Government directive aiming at progressively reducing all wheat (spring and winter) planted area from 12.4 million hectares in 2016 to 10.1 million hectares in 2021, in favour of more profitable oil crops. Barley production is estimated at a bumper level of 4.5 million tonnes, due to record plantings, officially set at 3 million hectares.

Planting of the 2020 winter wheat crops (output of which generally amounts to about 5 percent of the total annual wheat production) is ongoing under overall favourable weather conditions and it is expected to be finalized by the end of November. Crops will be harvested between June and September next year.

Below-average exports forecast in 2019/20

Total cereal exports in the 2019/20 marketing year (July/June), are forecast at about 8 million tonnes, about 8 percent below the average and a five-year low. Exports of wheat are forecast at 6.5 million tonnes, 15 percent below the average volume on account of the 2019 reduced domestic output. By contrast, barley exports are forecast well above the average at 1.3 million tonnes, amid bumper production and strong demand from international markets.

Kazakhstan

Crop Calendar (*major foodcrop)



Sowing
Growing
Harvesting

Source: FAO/GIEWS.

Kazakhstan

Cereal Production

	2014-2018	2018	2019	change
	average			2019/2018
000 tonnes				
				percent
Wheat	14 096	13 947	11 500	-17.5
Barley	3 119	3 972	4 500	13.3
Maize	761	862	928	7.6
Others	891	969	957	-1.2
Total	18 867	19 749	17 885	-9.4

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

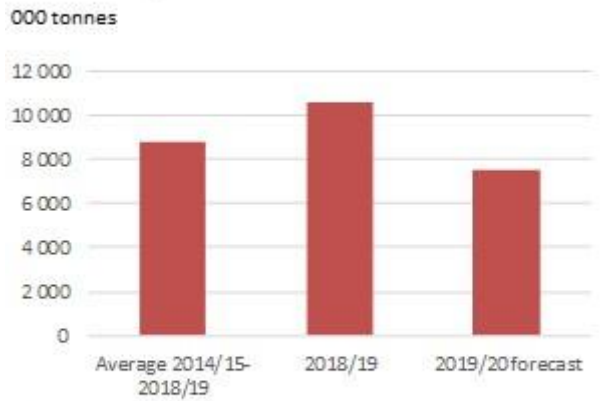
Export prices of wheat increased in last two months

Export prices of milling quality wheat remained overall stable between April and August 2019 and increased in September and October, mainly due to a pick-up in demand from importers and poorer expectations for the 2019 wheat output. Prices in October were about 20 percent higher than their values of a year before. Domestic retail prices of wheat grain and wheat flour remained stable or slightly increased over the last six months and, in September 2019, they were about 20 percent higher than a year earlier, in line with the export price trends and amid a weaker local currency.

Prices of potatoes, another important staple, after sharply increasing in June 2019, remained virtually unchanged in July and August and seasonally decreased in September, but remained higher than their levels a year earlier.

Kazakhstan

Cereals Exports

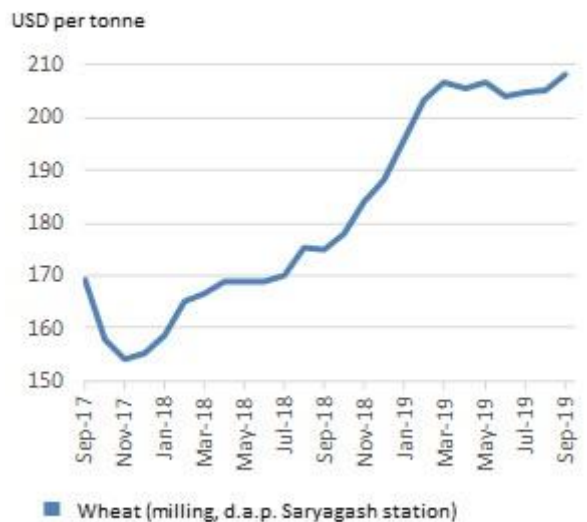


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Kazakhstan

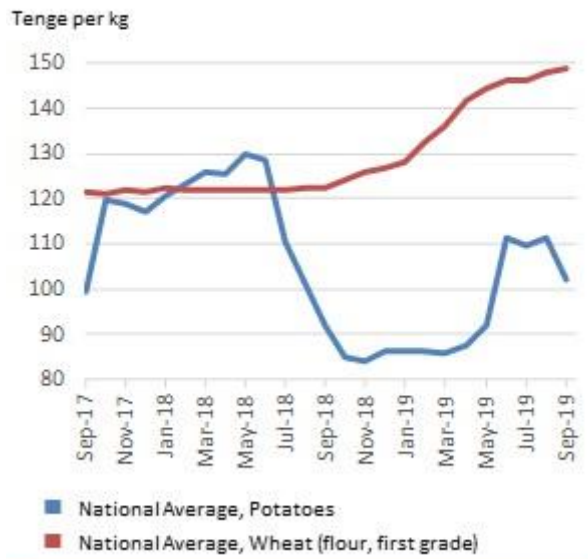
Export prices of milling wheat



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Kazakhstan

Retail prices of potatoes and wheat flour



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Kazakhstan

Reference Date: 03-April-2019

FOOD SECURITY SNAPSHOT

- Growth of 2019 winter crops about to resume
- Cereal production in 2018 estimated above average level
- Above-average exports expected in 2018/19
- In February, export prices of wheat at highest levels since August 2015

Growth of 2019 winter crops about to resume

Winter wheat crops (the output of which generally amounts to about 6 percent of the total wheat production) were planted by the end of November 2018 and will be harvested between June and September 2019. Overall conditions of crops are reported to be satisfactory. In southern and southeastern key wheat-growing provinces, land preparation and planting operations were delayed by above normal precipitations, low temperatures and frosts. However, from early December onwards, regular and well-distributed snowfall ensured sufficient soil moisture and prevented crops from freezing. As of mid-March, snow was still covering most crop lands in Almaty Province, while it had almost entirely melted in Jambyl and Turkestan provinces, where crops are about to resume growth.

The area planted with 2019 winter wheat is estimated to be below the average level, reflecting the Government directive to progressively reduce all wheat (spring and winter) planted area from 12.4 million hectares in 2016 to 10.1 million hectares in 2021 in favour of more profitable oil crops.

Sowing of spring crops, to be harvested between mid-August and October 2019, is expected to start in May.

Cereal production in 2018 estimated above average level

Harvesting of 2018 cereals finalized by the end of October 2018 and total cereal production is estimated at 19.8 million tonnes, almost unchanged from 2017's above average level. Wheat output, which accounts for 70 percent of the total cereal production, is officially estimated at about 14 million tonnes, close to the five-year average, as high yields, resulting from abundant rainfall in the northern regions (where 85 percent of the wheat is grown), offset the contraction in the planted area. However, in the same regions, excessive soil moisture negatively affected the quality of grains. Barley output is officially estimated at a record

Kazakhstan

Crop Calendar

(*major foodcrop)

Barley (Spring)

Cereals

Wheat (Spring)*



Sowing

Growing

Harvesting

Source: FAO/GIEWS.

Kazakhstan

Cereal Production

	2013-2017	2017	2018	change
	average			2018/2017
000 tonnes				
				percent
Wheat	14 095	14 803	13 947	-5.8
Barley	2 833	3 305	3 972	20.2
Maize	703	785	862	9.9
Others	851	977	969	-0.8
Total	18 481	19 870	19 749	-0.6

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

level of almost 4 million tonnes, 20 percent above 2017's level and almost 30 percent above the average, on account of larger planted area and favourable weather conditions, which boosted yields.

Above-average exports expected in 2018/19

In the 2018/19 marketing year (July/June), aggregate cereal exports are forecast at 9.7 million tonnes, slightly below the previous year's level, but still well above the five-year average. Exports of wheat, half of which are generally shipped to Afghanistan and Uzbekistan, are forecast at an above-average level of 8 million tonnes. Barley exports are foreseen to reach an all-time high of 1.5 million tonnes, almost 50 percent above the average level, amid bumper production and strong demand from international markets.

In February, export prices of wheat at highest levels since August 2015

Export prices of milling quality wheat increased over the last five months and, in February 2019, reached the highest level since August 2015. The increase is mainly due to strong foreign demand and reduced availabilities of high quality wheat due to adverse weather conditions in key producing northern regions. Domestic retail prices of wheat grain and wheat flour increased slowly since September 2018 and, in February 2019, were about 10 percent year-on-year higher, in line with export price trends and with the country's weaker currency contributing to the upward pressure.

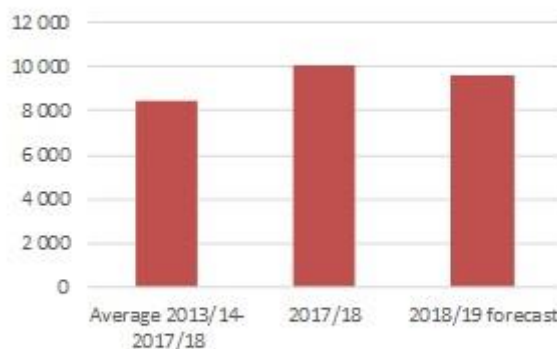
Prices of potatoes, another important staple, have been overall stable in the last months and, in February 2019, were at levels significantly lower than a year earlier.

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Kazakhstan

Cereals Exports

000 tonnes



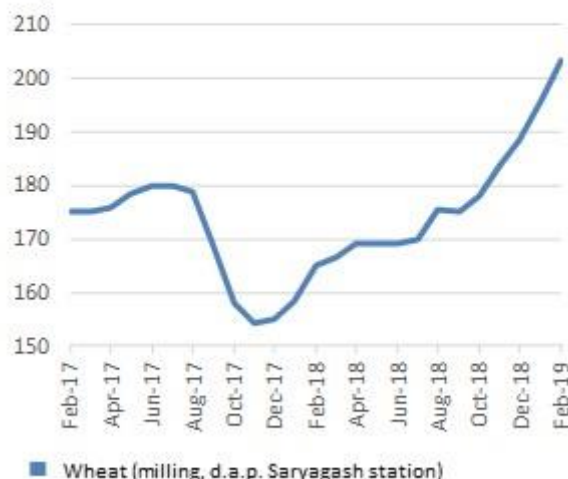
Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Kazakhstan

Export prices of milling wheat

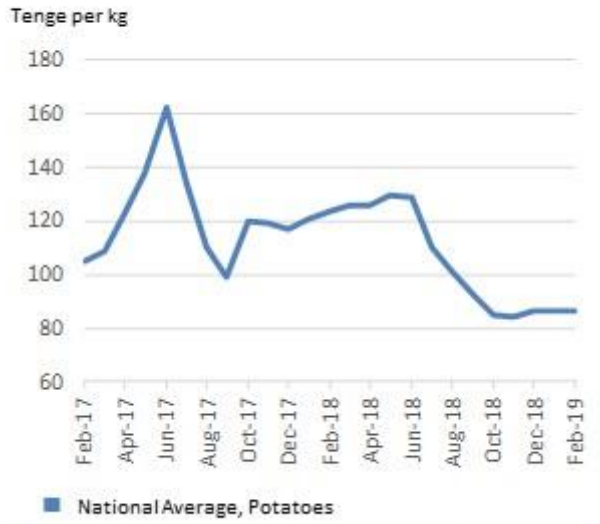
USD per tonne



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Kazakhstan

Retail prices of potatoes



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Kazakhstan

Reference Date: 14-December-2018

FOOD SECURITY SNAPSHOT

- Area sown with 2019 winter wheat estimated below average level
- Cereal production in 2018 estimated above average level, mainly due to record barley output
- Barley exports in 2018/19 expected at record levels
- In November, export and domestic prices of wheat higher than year earlier

Area sown with 2019 winter wheat estimated below average level

Overall conditions of 2019 winter wheat crops, planted by the end of November to be harvested between June and September next year, are reported to be satisfactory. However, above normal precipitations, low temperatures and frosts in the southern provinces of the country, the main winter wheat producing area, were observed in October-November, which delayed land preparation and planting operations. As of early December, a thick snow coverage, which seasonally prevents crops from freezing, was observed in Almaty Province, southeast of the country, while it was still insufficient in Zhambyl and Turkestan southwestern provinces.

The area sown with 2019 winter wheat is estimated to be below the average level, reflecting a Government directive to progressively reduce all wheat (spring and winter) planted area from an estimated 12.4 million hectares in 2017 to 10.1 million hectares in 2021 in favour of more profitable oil crops.

Cereal production in 2018 estimated above average level, mainly due to record barley output

Harvesting of the 2018 cereal crops finalized by end October and total production is estimated at 21 million tonnes, 6 percent more than the above average level in 2017.

Barley output is estimated at a ten-year high of 4.2 million tonnes, following larger planted area and high yields.

Production of wheat is set at 15 million tonnes, 6 percent above the five-year average, as high yields, resulting from abundant rainfalls in the northern regions (where 85 percent of wheat is grown), more than offset the contraction in the planted area. In

Kazakhstan

Crop Calendar

(*major foodcrop)

Barley (Spring)

Cereals

Wheat (Spring)*



Sowing

Growing

Harvesting

Source: FAO/GIEWS.

Kazakhstan

Cereal Production

	2013-2017	2017	2018	change
	average			2018/2017
000 tonnes				
				percent
Wheat	14 095	14 803	15 000	1.3
Barley	2 833	3 305	4 200	27.1
Maize	703	785	800	2.0
Others	851	977	1 009	3.3
Total	18 481	19 870	21 009	5.7

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

the same regions, excessive soil moisture affected the quality of grains.

Barley exports in 2018/19 expected at record levels

Aggregate cereal exports in the 2018/19 marketing year (July/June) are forecast at 10.6 million tonnes, above the previous year's level and 26 percent above the five-year average. The projected increase rests mainly on record shipments of barley, which are forecast at 2 million tonnes, about three times above the average and 40 percent more than the 2017/18 marketing year, amid bumper production and strong demand from international markets. Wheat exports are expected to remain unchanged from the previous year, at 8.5 million tonnes, still 13 percent above the five-year average level.

In November, export and domestic prices of wheat higher than year earlier

Export prices of milling wheat are continuing their upward trend, which started at the end of last year with the weakening of the national currency. In November 2018, prices were 19 percent higher than a year earlier on the backdrop of crop quality losses and strong demand from neighbouring countries.

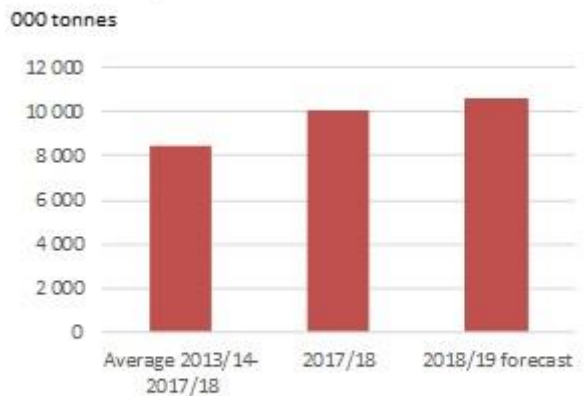
Domestic retail prices of wheat flour strengthened seasonally and they were slightly higher than in November 2017.

Prices of potatoes, another important staple, have been decreasing since June 2018 and, in November, they were significantly lower than a year earlier.

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Kazakhstan

Cereals Exports

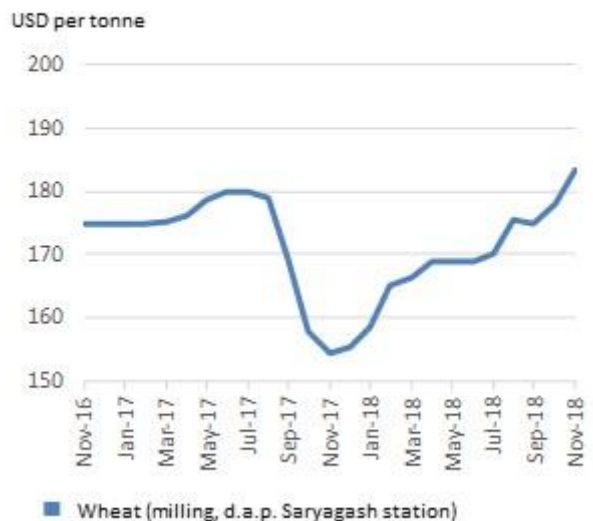


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Kazakhstan

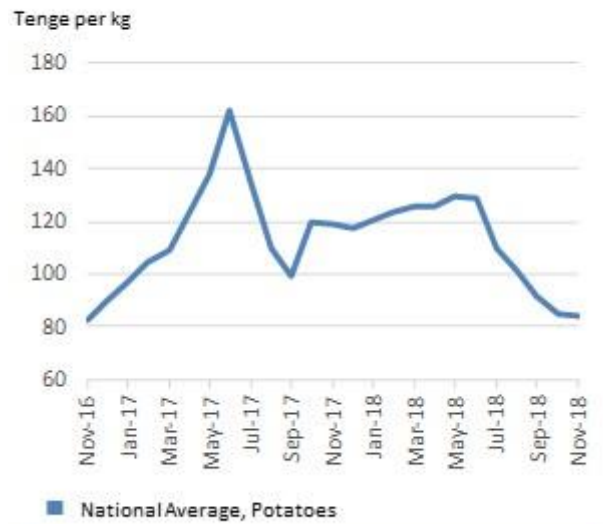
Export prices of milling wheat



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Kazakhstan

Retail prices of potatoes



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Kazakhstan

Reference Date: 24-July-2018

FOOD SECURITY SNAPSHOT

- **Aggregate 2018 cereal production forecast close to average level**
- **Wheat exports in 2018/19 expected close to previous year**
- **Export prices of wheat increased over last six months**

Cereal production in 2018 forecast close to average level

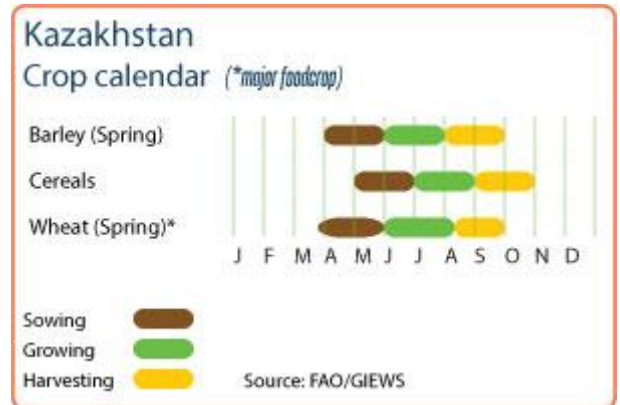
Harvesting of the winter crops started in June, while the harvest of the spring crops will start in August. Aggregate cereal production in 2018 is estimated at 18.6 million tonnes, 7 percent below the high level of 2017, but close to the five-year average. Wheat output, which accounts for more than 70 percent of the total cereal production, is estimated at 13.7 million tonnes, 7 percent below the high level of last year. The decline in production is mainly due to the reduction in the area planted following the implementation of the Government's Programme for 2016-2021, which intends to reduce the wheat area planted from 12.4 to 10.1 million hectares in favour of more profitable oil crops. According to the Programme, the Government has stopped issuing subsidized credits for wheat production. As a result, the wheat planted area declined to 11.4 million hectares in 2018, down 0.5 million hectares from the previous year. Production of barley, the second most important cereal crop, is estimated to be close to the high levels of 2017.

Wheat exports in 2018/19 expected close to previous year's level

The country remains the main exporter of wheat in the CIS subregion and it plays an important role in ensuring subregional food security. Aggregate cereal exports in the 2018/19 marketing year (July/June) are forecast at about 9.2 million tonnes, close to the high level of the 2017/18 season. Wheat exports (including wheat flour in grain equivalent) are expected at 8 million tonnes, 300 000 tonnes below the high level of the previous year due to the expected reduction in domestic production.

Export prices of wheat increased over last six months

Wheat export quotations increased by 10 percent since January 2018, supported by trends in the international markets.



Kazakhstan
Cereal production

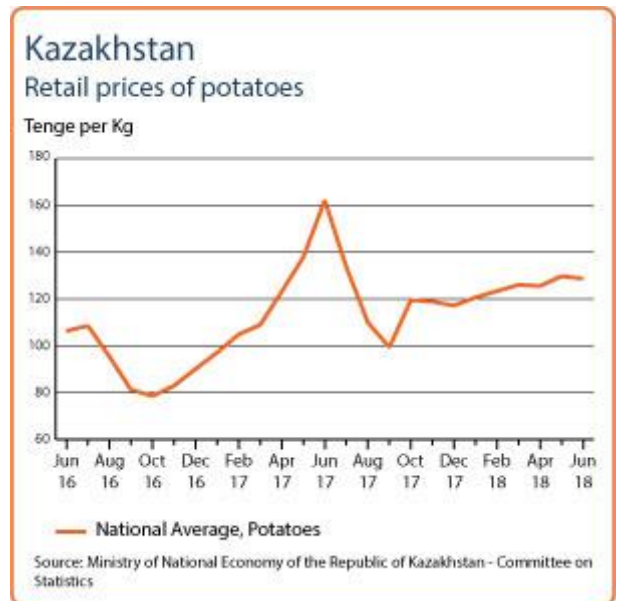
	2013-2017 average	2017	2018 forecast	change 2018/2017
	000 tonnes			percent
Wheat	14,095	14,803	13,700	-7
Barley	2,833	3,305	3,300	0
Maize	703	785	750	-4
Others	851	977	801	-18
Total	18,481	19,870	18,551	-7

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Domestic prices of wheat flour increased as well, but were below the levels of the previous year, reflecting good domestic supplies from a bumper crop in 2017.

Prices of potatoes, another important staple, rose seasonally from September 2017 until June 2018, when the newly harvested crops started to arrive on the local markets. However, in June, prices of potatoes were more than 20 percent below their exceptionally high values of a year earlier, when shortages in subregional production led to sharp increases.



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GIEWS Country Brief Kazakhstan

Reference Date: 14-September-2017

FOOD SECURITY SNAPSHOT

- **Aggregate 2017 cereal production estimated at above-average level**
- **Wheat exports in 2017/18 expected to decline from previous year**
- **Export prices of wheat remained stable over last three months**

Cereal production in 2017 estimated at above-average level

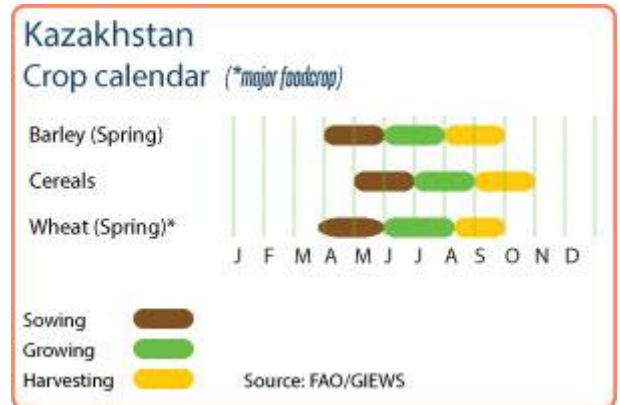
Harvesting of the 2017 cereal crops is expected to finalize by the end of October. Aggregate cereal production is estimated at 19 million tonnes, down 4 percent from the 2016 level, but still well above the five-year average. Wheat output, which accounts for more than 70 percent of the total cereal production, is estimated at 14 million tonnes, 7 percent below the high level of last year. The decline in production is mainly due to the reduction in area planted following the implementation of the Government's Programme for 2017-2021 which intends to reduce the wheat area planted from 12.4 to 10.1 million hectares in favour of more profitable oil crops. According to the Programme, the Government has stopped issuing subsidized credits for wheat production. Barley and maize production is estimated to be close to the high levels of 2016.

Wheat exports projected to decline in 2017/18

The country remains the main exporter of wheat in the CIS subregion and it plays an important role in ensuring subregional food security. Aggregate cereal exports in the 2017/18 marketing year (July/June) are forecast at about 8.3 million tonnes, down 3 percent from the 2016/17 season. This decline comes from expectations of smaller demand for wheat outside of the CIS Asia subregion and increasing competition with grains from the Russian Federation, which gathered a record crop in 2017. Therefore, wheat exports (including wheat flour in grain equivalent) are expected at 7.3 million tonnes, down by 200 000 tonnes from the high level of previous year.

Export prices of wheat remained stable over last three months

Wheat export quotations remained at the same level in the past several months, mainly reflecting low trade activity ahead of the arrival of the new supplies from the 2017 main harvest, which has recently started and is expected at a good level.



Kazakhstan
Cereal production

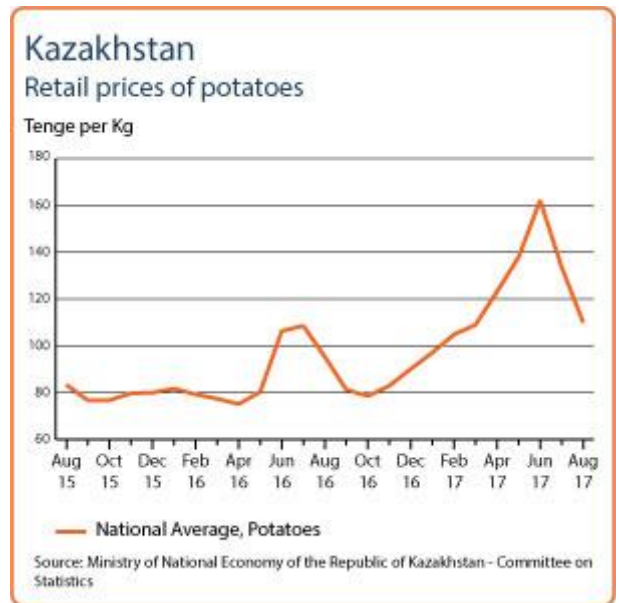
	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes		percent	
Wheat	13 102	14 985	14 000	-7
Barley	2 471	3 231	3 300	2
Maize	644	762	760	0
Others	744	985	1 016	3
Total	16 961	19 963	19 076	-4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Domestic prices of wheat flour increased slightly over the last three months and were higher than a year earlier following continuous devaluation of the local currency.

Prices of potatoes, another important staple, rose sharply from October 2016 until June 2017, when newly-harvested crops started to arrive on the local markets. In August, prices of potatoes declined by 18 percent, but were still more than 20 percent higher than a year earlier. Prices of potatoes are likely to remain above the previous year's levels, reflecting unfavourable production prospects in 2017 at subregional level.



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GIEWS Country Brief Kazakhstan

Reference Date: 22-March-2017

FOOD SECURITY SNAPSHOT

- Aggregate cereal production increased in 2016
- Wheat exports in 2016/17 expected to rise from previous year
- Export prices of wheat increased in March

Aggregate cereal production increased in 2016

Latest estimates point to an 11 percent increase in total cereal production in 2016 to 20 million tonnes. Wheat output is set to reach 15 million tonnes, following better-than-expected yields. Similarly, barley and maize outputs also increased from last year to 3.2 million tonnes and 0.8 million tonnes, respectively.

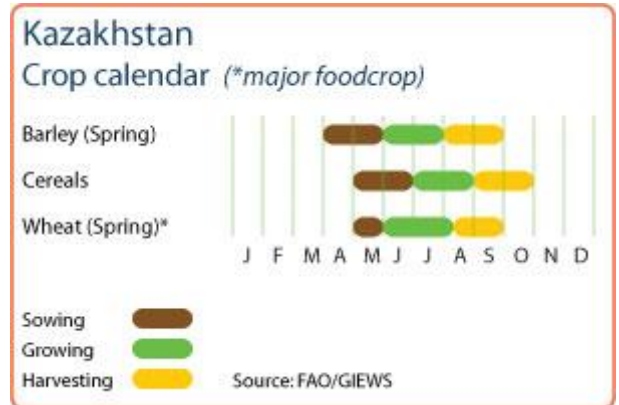
Planting of minor winter cereals, to be harvested between June and September 2017, has been completed by November under generally favourable weather conditions. Despite temperature swings observed in February, which are expected to negatively affect the quality of wheat grains in some areas of the country, overall production prospects are good. Land preparation for 2017 main spring wheat and barley crops, which represent more than 90 percent of the annual production, is well advanced and planting operations are expected to start in April.

Wheat exports projected to rise in 2016/17

The country remains a major exporter of cereals (mainly wheat) and plays an important role in ensuring food security in the subregion. Aggregate cereal exports in the 2016/17 marketing year (July/June) are forecast at around 9 million tonnes, up 16 percent from the 2015/16 season. This increase rests on expectations of higher demand outside of the CIS Asia subregion. Of the total, wheat (including wheat flour in grain equivalent) is expected to account for 8 million tonnes, up by 1 million tonnes from the previous year.

Export prices of wheat increased in March underpinned by reviving import demand

Export prices of milling wheat have been relatively stable in recent months. However, at the end of February, prices increased as a result of reviving demand from key importers and increasing export prices in the Black Sea region. In March 2017, prices were around 9 percent higher than a year earlier.



Kazakhstan
Cereal production

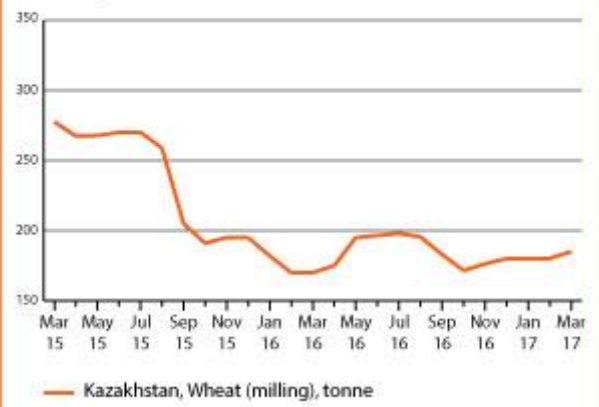
	2011-2015 average	2015	2016 estimate	change 2016/2015
	000 tonnes			percent
Wheat	14 652	13 747	14 985	9
Barley	2 345	2 675	3 231	21
Maize	588	734	762	4
Others	693	783	985	26
Total	18 278	17 939	19 963	11

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Kazakhstan Export prices of milling wheat

US Dollar per tonne



Source: APK-Inform Agency



GIEWS Country Brief Kazakhstan

Reference Date: 05-September-2016

FOOD SECURITY SNAPSHOT

- Aggregate cereal production to increase in 2016
- Wheat exports in 2016/17 to increase marginally from previous year
- Export prices of wheat declined slightly over past month

Aggregate cereal production in 2016 forecast to increase

Latest forecasts point to a 5 percent increase in total cereal production in 2016 to 18.8 million tonnes, up 5 percent from the 2015 level. Wheat output is now forecast to reach 14.5 million tonnes, higher than the previous forecast, following a recent upward adjustment to reflect higher estimates of planted area and improved yield prospects. Barley and maize outputs are also expected to increase from last year, to 2.7 million tonnes and 800 000 tonnes, respectively.

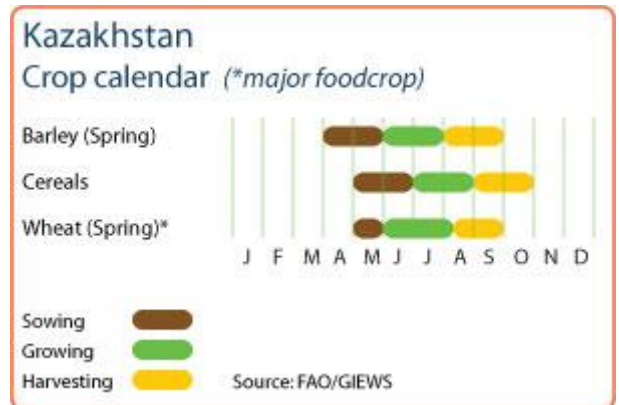
Wheat exports are projected to increase marginally in 2016/17

Kazakhstan is a major exporter of cereals (mainly wheat) and plays an important role in ensuring food security in the subregion. The bulk of cereals are traditionally exported to neighbouring CIS countries (around 40 percent of all exports go to Uzbekistan), but also outside the subregion to Afghanistan, China and the Islamic Republic of Iran.

Aggregate cereal exports in the 2016/17 marketing year (July/June) are forecast at 7.7 million tonnes, up marginally from the 2015/16 season. Of the total, wheat (including wheat flour in grain equivalent) is expected to account for 7 million tonnes, up by 100 000 tonnes from the previous year.

Export prices of wheat declined in August

With the arrival of the new crop in the market and limited import demand from neighbouring countries, export prices for wheat in Kazakhstan started to decline in August, after several months of growth. In August, export quotations were just 1 percent below the previous month's level but 24 percent below their level of the corresponding period the year before.



Kazakhstan
Cereal production

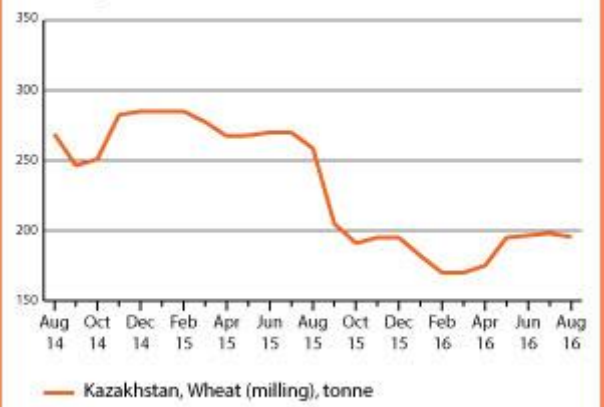
	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Wheat	14 652	13 748	14 500	5
Barley	2 345	2 675	2 700	1
Maize	588	734	800	9
Others	693	783	802	2
Total	18 278	17 940	18 802	5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Kazakhstan Export prices of milling wheat

US Dollar per tonne



Source: APK-Inform Agency



GIEWS Country Brief Kazakhstan

Reference Date: 22-July-2016

FOOD SECURITY SNAPSHOT

- Cereal production in 2016 to decline slightly
- Wheat exports in 2016/17 to decrease from last year following smaller harvest
- Export prices of wheat increased slightly over last months

Cereal production in 2016 to decline slightly from last year's level

The 2016 cereal crop, which is expected to be harvested from August, is forecast at 17.8 million tonnes, slightly below the 2015 level. Most of the decline is on the account of a smaller wheat crop which is forecast at 13.5 million tonnes. The decrease reflects a continuation of the downward trend in wheat area of the past few years as farmers, wherever possible, are switching land to more profitable crops, in particular maize. Maize production is expected to rise by 9 percent to 800 000 tonnes. Outputs of other crops, such as barley and oats, are also expected higher than last year.

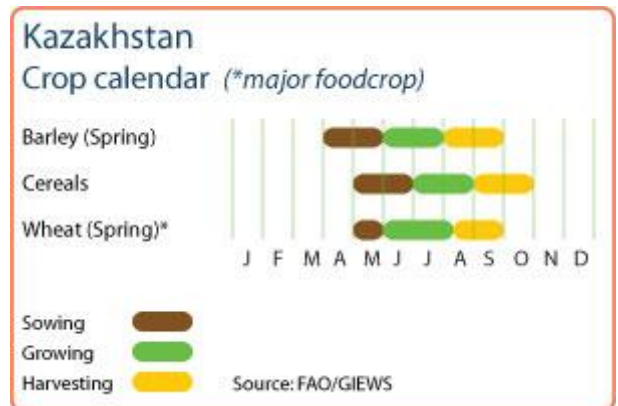
Wheat exports in 2016/17 to decline from last season following smaller harvest

Kazakhstan is a main exporter of cereals (mainly wheat) and plays an important role in ensuring food security in the subregion. The bulk of cereals are traditionally exported to neighbouring CIS countries (around 40 percent of all exports go to Uzbekistan), but also outside the subregion to Afghanistan, China and the Islamic Republic of Iran.

Total cereal exports in the 2016/17 marketing year (July/June) are forecast at 7.2 million tonnes, down 4 percent from the 2015/16 season. Of the total, wheat (including wheat flour in grain equivalent), is expected to account for 6.5 million tonnes, down by 400 000 tonnes from the previous year.

Export prices of wheat continued to increase in July

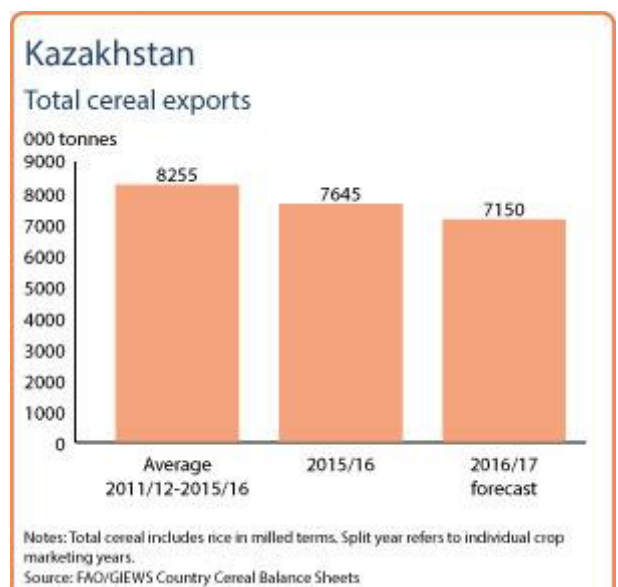
Despite downward pressure from the prospect of a generally good wheat crop in the CIS subregion this year, export prices of milling wheat in Kazakhstan continued to increase further slightly in June and the first half of July, continuing the upward trend since March. High export demand and strengthening of the national currency supported prices.



Kazakhstan
Cereal production

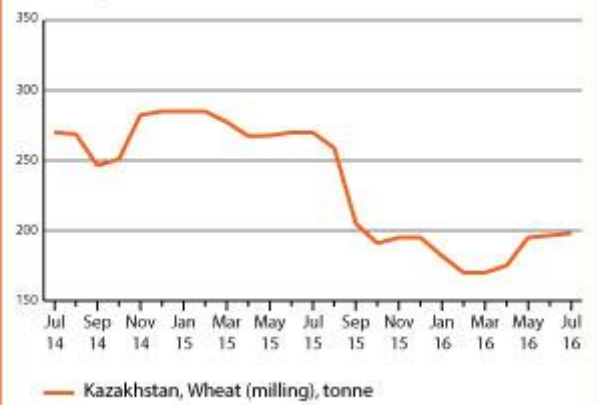
	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Wheat	14 652	13 748	13 500	-2
Barley	2 345	2 675	2 700	1
Maize	588	734	800	9
Others	693	783	802	2
Total	18 278	17 940	17 802	-1

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Kazakhstan Export prices of milling wheat

US Dollar per tonne



Source: APK-Inform Agency

Reference Date: 16-February-2016

HIGHLIGHTS

- Cereal production in 2015 above the five-year average
- Wheat exports in 2015/16 to increase from last season following good harvest and competitive prices
- Export prices of wheat were 40 percent below their year-earlier level

Cereal production in 2015 above the five-year average

Total wheat output in **2015** is estimated at 13.7 million tonnes, around 6 percent higher than in the previous year. The increase comes from improved yields as a result of overall favourable weather conditions. The better yields offset a contraction in planting area, which occurred following a shift to more profitable crops. Good weather also contributed to better harvests of barley and maize, outputs of which both rose by more than 10 percent compare to 2014 levels. As for the winter wheat to be harvested in **2016**, the planting area is reported to have shrunk by 11 percent from the previous year. However, this crop, which accounts for only 5 percent of the country's total wheat production, was reported to be at good condition as of the end of January. Most of the 2016 wheat crop will be sown later this year in May.

Wheat exports in 2015/16 to increase from last season following good harvest and competitive prices

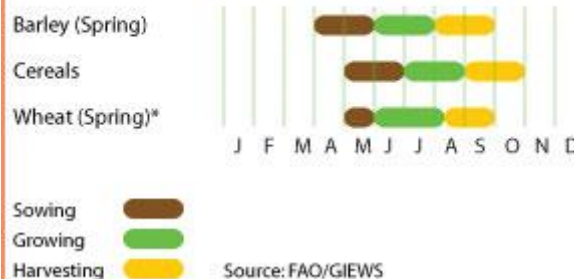
Kazakhstan is a main exporter of cereals (mainly wheat) and plays an important role in the food security of the subregion. The bulk of cereals are traditionally exported to neighbouring CIS countries (namely Azerbaijan, Kyrgyzstan, Tajikistan and Uzbekistan) but also outside the subregion to Afghanistan.

Exports of wheat in the 2015/16 marketing year (July/June) are forecast at 6.2 million tonnes, up 13 percent from the 2014/15 season. During the period July-December 2015, Kazakhstan exported about 9 percent more than the corresponding period of the previous year. The projected increase in wheat shipments is mainly driven by the current competitive price of Kazakhstan grain.

Export prices of wheat were 40 percent below their year-earlier level

Export prices of milling wheat declined by 7 percent in January following trends in the international market and the continued depreciation of the national currency. Kazakhstan switched to a free float exchange rate in August 2015, triggering a 23 percent slide in the tenge over the first month of the new policy. As of January 2016, the export price of wheat grain was almost 40 percent below its year-earlier level, also reflecting a recent slowdown in export demand from neighbouring countries and the 2015 bumper output. At their levels in January, wheat export prices were down to the same level as those of the other exporters in the subregion – the Russian Federation and Ukraine.

Kazakhstan Crop calendar (*major foodcrop)

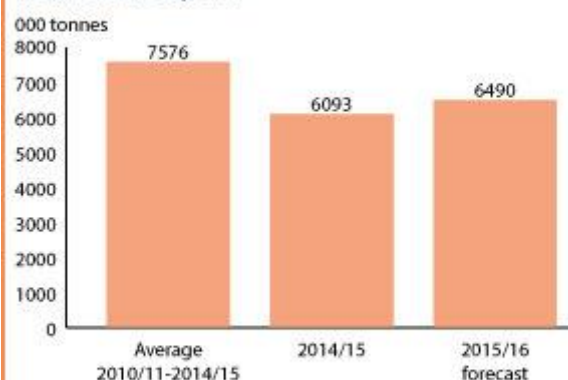


Kazakhstan Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes			percent
Wheat	13 869	12 997	13 748	6
Barley	2 100	2 412	2 675	11
Maize	508	664	734	11
Others	654	738	741	0
Total	17 132	16 811	17 898	6

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Kazakhstan Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Kazakhstan Export prices of milling wheat

US Dollar per tonne



Source: APK-Inform Agency

Reference Date: 23-October-2015

HIGHLIGHTS

- Cereal production in 2015 increased slightly from last year's below-average level
- Wheat exports in 2015/16 expected to increase
- Export prices of wheat declined in October and were well below their year-earlier level

Cereal production in 2015 increased slightly from last year's below-average level

Harvesting of the 2015 cereal crops, mainly wheat, concluded in September and aggregate output is estimated at 17.6 million tonnes, 6 percent up from the previous year's level, reflecting a slight improvement in yields following overall favourable weather conditions. Increased yields more than offset a contraction of over 4 percent in the area planted following a shift to alternative crops, including oilseeds and fodder crops. Wheat output, which accounts for over 80 percent of annual cereal production, is estimated at 14 million tonnes, about 8 percent up from last year, representing the largest crop since the bumper harvest of 2011. Barley production increased slightly while output of maize fell by 17 percent, although remained about the average level of the past five years.

Wheat exports in 2015/16 are forecast to increase from last year's level

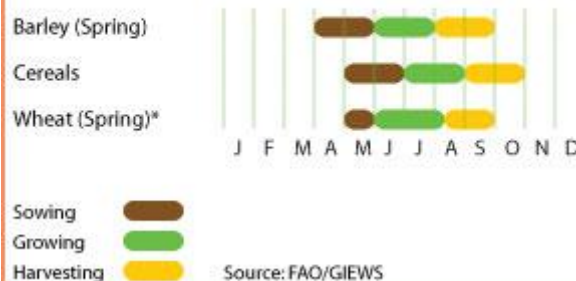
Kazakhstan is an important exporter of cereals (mainly wheat) and plays a central role in the subregion's food security. The bulk of cereals are traditionally exported to neighbouring CIS countries (namely Azerbaijan, Kyrgyzstan, Tajikistan and Uzbekistan) but also outside the subregion to Afghanistan. Exports of wheat in the 2015/16 marketing year (July /June) are forecast at almost 6.5 million tonnes, some 9 percent above last year's level, mainly reflecting the increased output in 2015.

Export prices of wheat declined in October and were well below their year-earlier level

Export prices of wheat grain declined in October as a result of the sharp depreciation of the national currency against the US dollar during August and September; new supplies from the 2015 main spring harvest entering the market and limited trade activity due to reduced import demand from neighbouring countries. Export prices of milling wheat in the subregion were well below their year-earlier levels, in line with trends in the international market.

Kazakhstan

Crop calendar (*major foodcrop)



Kazakhstan

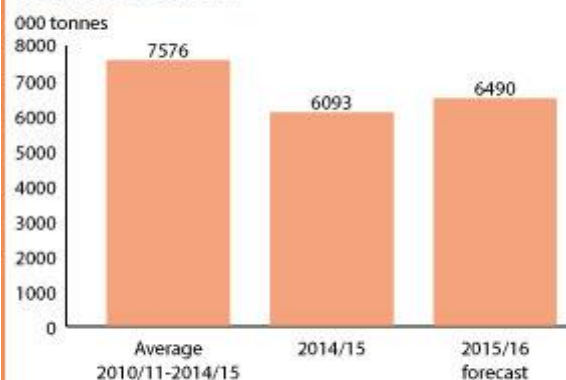
Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Wheat	13 877	12 996	14 000	8
Barley	2 098	2 400	2 500	4
Maize	492	600	500	-17
Others	631	620	623	0
Total	17 097	16 616	17 623	6

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

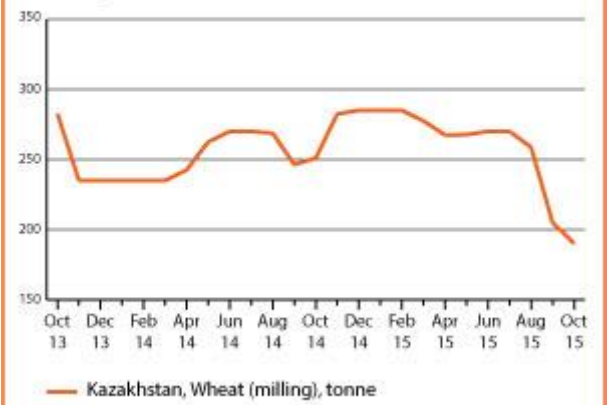
Kazakhstan

Total cereal exports



Kazakhstan Export prices of milling wheat

US Dollar per tonne



Source: APK-Inform Agency

Reference Date: 05-May-2015

FOOD SECURITY SNAPSHOT

- **Wheat production in 2015 is forecast to fall**
- **Wheat exports in 2014/15 expected to decrease**
- **Export prices of wheat declined in April but still higher than a year earlier**

Wheat production in 2015 forecast below last year's level

Kazakhstan's planting of the 2015 spring crops, mainly wheat, is currently ongoing under overall favourable weather conditions. Wheat output, which accounts for over 80 percent of annual cereal production, is currently forecast by FAO at 12.5 million tonnes, 4 percent down from last year's level. The drop is mainly due to a contraction in the area planted following a shift to alternative crops, including oilseeds. Productions of barley and maize are anticipated to remain close to the 2014 good performances. The 2015 total cereal output is forecast at 16.1 million tonnes, slightly below last year's level.

Wheat production in 2014 totalled around 13 million tonnes, 6.8 percent down from the 2013 output, as a result of a reduction of the planted area, coupled with lower yields following adverse weather conditions.

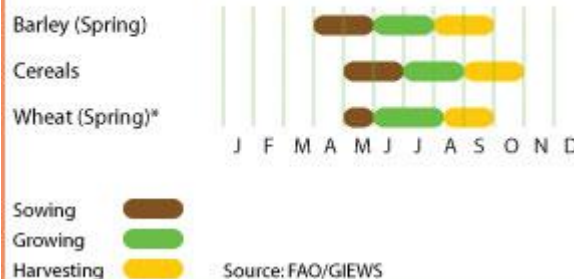
Wheat exports in 2014/15 are forecast to decrease from last year's near-average level

Kazakhstan is an important exporter of cereals (mainly wheat) and plays a central role in the subregion food security. The bulk of cereals are traditionally exported to CIS countries (namely Azerbaijan, Kyrgyzstan, Tajikistan and Uzbekistan) and to Afghanistan. Exports of wheat in the 2014/15 marketing year (July /June) are forecast at 6 million tonnes, some 18 percent below last year's near-average level, mainly reflecting the lower output in 2014.

Export prices of wheat declined in April but still higher than a year earlier

Kazakhstan's wheat export quotations declined in April for the second consecutive month, reflecting lower international prices, a slow pace of shipments and overall favourable prospects for the 2015 wheat crops in the country. Nonetheless, export prices were 10 percent higher than in April last year, due to the reduced output and poorer quality of the 2014 wheat crop, along with increased procurement prices set by the Government in December 2014.

Kazakhstan Crop calendar (*major foodcrop)

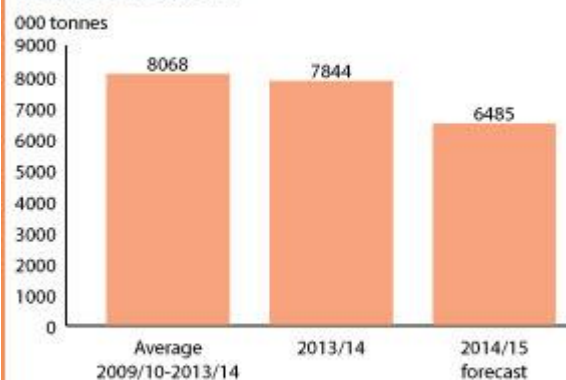


Kazakhstan Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes			percent
Wheat	13,877	12,996	12,500	-4
Barley	2,118	2,500	2,500	0
Maize	472	500	500	0
Others	631	620	623	0
Total	17,097	16,616	16,123	-3

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

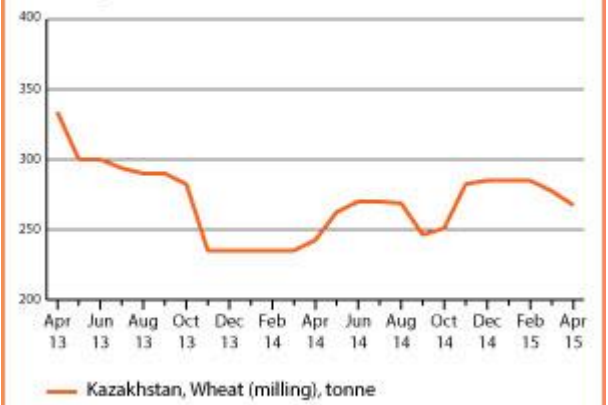
Kazakhstan Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Kazakhstan Export prices of milling wheat

US Dollar per tonne



Source: APK-Inform Agency

Reference Date: 19-September-2014

FOOD SECURITY SNAPSHOT

- Wheat production in 2014 is estimated to decrease from last year's below-average level
- Wheat exports in 2014/15 are forecast to decrease from last year's above-average level
- Export prices of wheat are stable for the third consecutive month in August

Wheat production in 2014 is estimated to decrease from last year's below-average level

Harvesting of the 2014 spring crops, mainly wheat, accounting for over 80 percent of annual cereal production, is currently underway and will be concluded by the end of September. FAO estimates the 2014 wheat output at 13.6 million tonnes, 3 percent down from last year's below-average level. This is the result of a small contraction in planted area, as well as anticipated lower yields, due to adverse weather conditions in early September over the northwestern part of the country, particularly in the Kostanay region, one of the main wheat producing area. Barley is anticipated to reach 2.6 million tonnes, slightly above last year's good level. The 2014 total cereal output is expected to reach 17.2 million tonnes, slightly below last year's level.

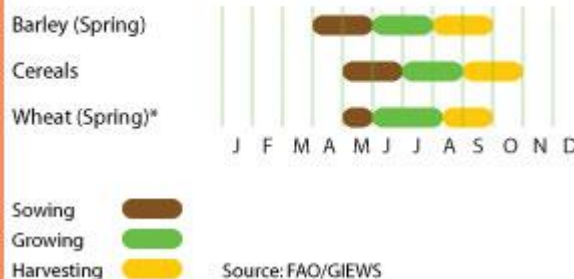
Wheat exports in 2014/15 are forecast to decrease from last year's above-average level

Kazakhstan is a main exporter of cereals (mainly wheat) and plays an important role in the subregion's food security. The bulk of cereals are traditionally exported to CIS countries (namely Azerbaijan, Kyrgyzstan, Tajikistan and Uzbekistan) and to Afghanistan. Exports of wheat in the 2014/15 marketing year (July /June) are tentatively forecast at 6.8 million tonnes, some 15 percent below last year's near-average level. Increases of Government's investments in transportation and infrastructure may result in additional exports' opportunities in the nearest future, notably to China, the Islamic Republic of Iran and Turkey.

Export prices of wheat are stable for the third consecutive month in August

Wheat export prices remained unchanged for the third consecutive month in August, reflecting adequate supplies from the ongoing 2014 harvest. Overall, prices were below their levels of a year earlier.

Kazakhstan Crop calendar (*major foodcrop)

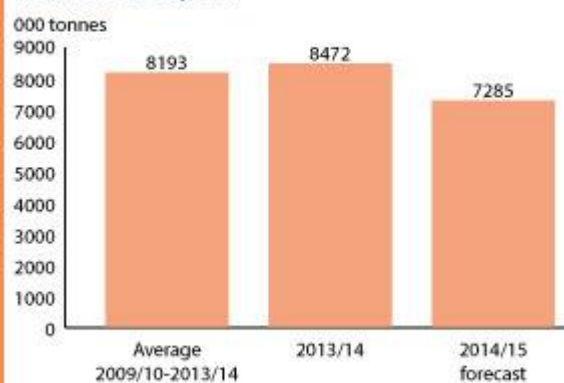


Kazakhstan Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Wheat	14 688	13 950	13 600	-3
Barley	2 130	2 500	2 550	2
Maize	456	550	500	-9
Others	629	613	581	-5
Total	17 903	17 613	17 231	-2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Kazakhstan Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Kazakhstan Export prices of milling wheat

US Dollar per tonne



Source: APK-Inform Agency

Reference Date: 05-August-2014

FOOD SECURITY SNAPSHOT

- Near-average 2014 wheat production anticipated
- Wheat exports in 2014/15 forecast close to the previous year's level
- Export prices of wheat stable in July

Near-average 2014 wheat production anticipated

Harvesting of the 2014 spring crops, mainly wheat, accounting for over 95 percent of annual cereal production, is currently underway and will be concluded by the end of September. Weather conditions between April and June were generally favourable, benefitting planting activities and early development of crops. Heavy rains in July, particularly over the northern part of the country, including Kostanay, North Kazakhstan and Akmola regions, are expected to cause limited damages to spring crops. FAO forecasts the 2014 wheat output at 14.8 million tonnes, 6 percent up from the 2013 below-average output. Barley and other feed crops are also anticipated to stay at around the level of the previous year. The 2014 total cereal output is expected to reach 18.5 million tonnes, an improvement of 5 percent over the previous year's average level. The projected outcome is also based on a significant increase in Government's agricultural support, including subsidies to fuel, fertilizers and other inputs, as well as lower interest rates for leasing agricultural machinery.

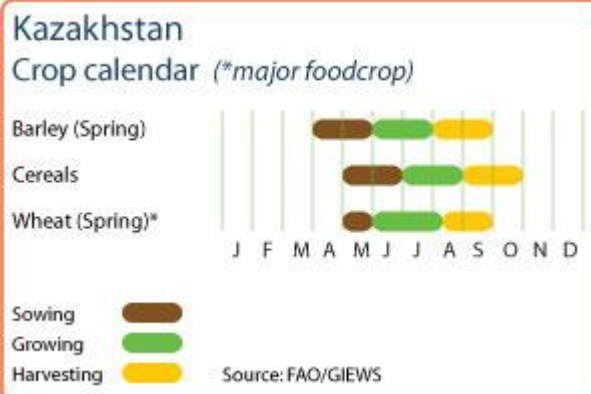
Wheat exports in 2014/15 forecast close to the previous year's level

Kazakhstan is a main exporter of cereals (mainly wheat) and plays an important role in the subregion's food security. The bulk of cereals is traditionally exported to CIS countries (namely Azerbaijan, Kyrgyzstan, Tajikistan and Uzbekistan) and to Afghanistan.

Exports of wheat in the 2014/15 marketing year (July /June) are tentatively forecast to remain around the 2013/14 level of 7.5 million tonnes. However, increases of Government's investments in transportation and infrastructure may result in additional exports' opportunities this season, notably to China, the Islamic Republic of Iran and Turkey.

Export prices of wheat stable in July

Wheat export prices were stable in July, as the start of the harvest period approaches and prospects for the 2014 crop are generally favourable. Prices in July were some 8 percent below their year-earlier levels, despite some increases between April and June due to dwindling export availabilities.



Kazakhstan Cereal production

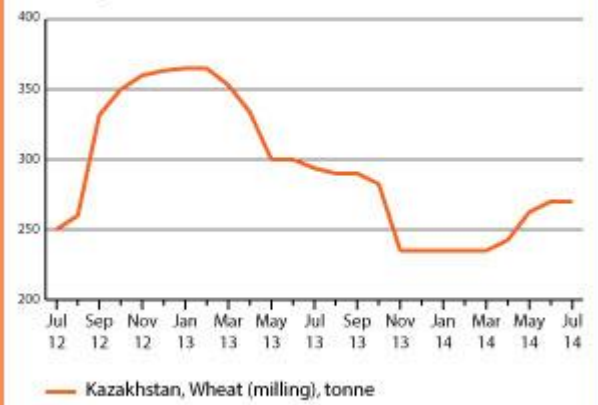
	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes			percent
Wheat	14,688	13,950	14,800	6
Barley	2,130	2,500	2,550	2
Maize	456	550	520	-5
Others	629	613	632	3
Total	17,903	17,613	18,502	5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Kazakhstan Export prices of milling wheat

US Dollar per tonne



Source: APK-Inform Agency

Reference Date: 04-July-2014

FOOD SECURITY SNAPSHOT

- Favourable prospects for cereal production in 2014
- Wheat exports in 2014/15 forecast close to the previous year's level
- Export prices of wheat increased in past months but lower than a year earlier

Favourable prospects for cereal production in 2014

Planting of the 2014 cereal spring crops, mainly wheat, accounting for over 95 percent of annual cereal production, was completed in June. The weather conditions since the beginning of the season in May have been generally favourable, benefitting planting activities and development of early planted crops. Assuming normal weather conditions continue during the remaining of the cropping season, FAO preliminarily forecasts the 2014 wheat output at 14.8 million tonnes, 6 percent up from 2013. Barley and other feed crops are also anticipated to increase and the 2014 total cereal output is expected at 18.5 million tonnes, an improvement of 5 percent over the previous year's average level. This year's projected good outcome is also based on a larger area planted following a significant increase in Government's agricultural support, including subsidies to fuel, fertilizers and other inputs, as well as lower interest rates for leasing agricultural machinery.

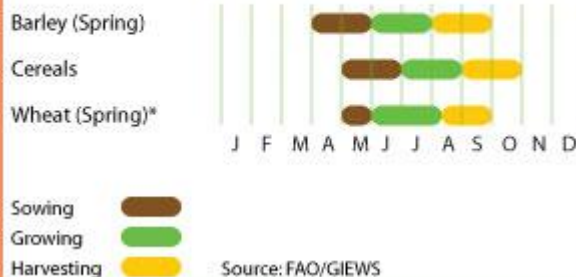
Wheat exports in 2014/15 forecast close to the previous year's level

Kazakhstan is a main exporter of cereals (mainly wheat) and plays an important role in the subregion's food security. The bulk of cereals is traditionally exported to CIS countries (namely Azerbaijan, Kyrgyzstan, Tajikistan and Uzbekistan) and to Afghanistan. Exports of wheat in 2014/15 marketing year (July /June) are tentatively forecast to remain around the 2013/14 level of 7.5 million tonnes. However, increases of Government's investments in transportation and infrastructure may result in additional exports' opportunities this season, notably to China, Iran and Turkey.

Export prices of wheat increased in past months but lower than a year earlier

Wheat export prices continued to seasonally strengthen in June mainly as a result of dwindling export availabilities. Prices have increased 15 percent over the past three months. However, June prices were still 10 percent lower compared to the same month last year. Increased export prices have also pushed up domestic prices of wheat flour.

Kazakhstan Crop calendar (*major foodcrop)

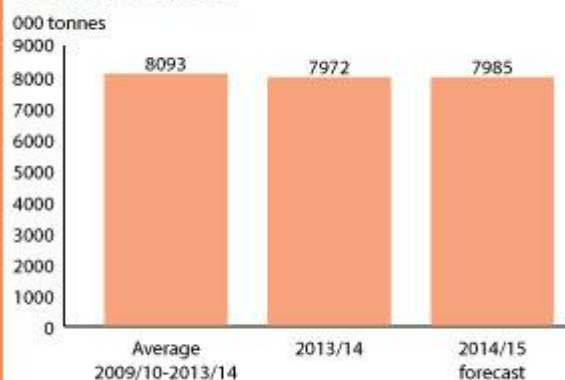


Kazakhstan Cereal production

	2009-2013 average	2013	2014 forecast	change 2014/2013
	000 tonnes		percent	
Wheat	14,688	13,950	14,800	6
Barley	2,130	2,500	2,550	2
Maize	456	550	520	-5
Others	629	613	632	3
Total	17,903	17,613	18,502	5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Kazakhstan Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Kazakhstan Export prices of milling wheat

US Dollar per tonne



Source: APK-Inform Agency

Reference Date: 13-January-2013

FOOD SECURITY SNAPSHOT

- Cereal production halved from last year's record level
- Wheat available for export for 2012/13 marketing year (July/June) faces logistical problems
- Prices of wheat increased significantly over the last three months of 2012

Cereal production halved from last year's record level

Kazakhstan is the most important producer of cereals (mainly wheat) in Central Asia and the bulk of the crop is spring sown in April and May. The total area planted under wheat (representing over 85 percent of total cereal production) has been officially reported as having decreased by 300 000 hectares, slightly down on last year's level. The government policy to diversify production of major crops will support the planting of forage crops at the expense of wheat. Less wheat being planted combined with lower returns on average yields and unfavourable weather conditions resulted in a significantly reduced output this season, estimated at half the record level of last season, or some 10.8 million tonnes. Spring crops account for over 95 percent of all cereals produced by the country.

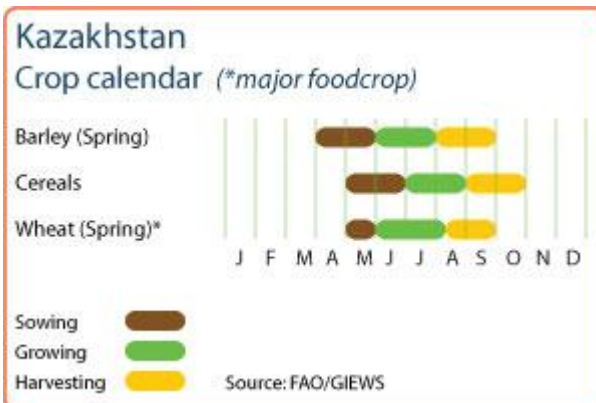
Wheat available for export for 2012/13 marketing year (July/June) faces logistical problems

Kazakhstan is a main exporter of cereals (mainly wheat) and plays an important role in the food security of the sub-region. The bulk of cereals are traditionally exported to Afghanistan, Iran, Turkey, and to countries in Central Asia that have food deficits, such as Azerbaijan, Kyrgyzstan, Tajikistan and Uzbekistan.

In spite of the significantly reduced 2012 harvest, exports of wheat are forecast to be some 7 million tonnes thanks to ample stocks after last years' bumper harvest. The amount to be exported is expected to be a third less than the previous year's level, which is reflected in reduced cereal production due to drought conditions during the cropping season. The export potential of the country faces difficulties caused by transportation and infrastructure constraints. Kazakhstan continues to experience logistical problems in getting wheat to export markets. In order to facilitate exports, the Government is providing subsidies for transporting grains to Black Sea and Baltic ports, securing more grain rail wagons and considering insurance guarantees on agricultural loans. However, these measures have not helped much because transportation costs are high, the quality of transport facilities is low and storage capacities are insufficient to serve the country's needs.

Prices of wheat increased significantly over the last three months of 2012

Declining wheat export prices in the second half of 2011, which reflected the record harvest, have been climbing again since July 2012. Wheat export prices further strengthened in November, more than doubling levels seen earlier in 2012. Increased export prices have also pushed up domestic prices on wheat flour by limiting the production of



Kazakhstan Cereal production

	2007-2011 average	2011	2012 estimate	change 2012/2011
	000 tonnes		percent	
Wheat	15,731	22,700	10,800	-52
Barley	2,214	2,600	1,500	-42
Maize	412	482	490	2
Others	653	788	640	-19
Total	19,010	26,570	13,430	-49

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



so called “social bread” which is needed in remotes area and for vulnerable groups of population.



Reference Date: 23-April-2012

FOOD SECURITY SNAPSHOT

- Early forecast point to sharp decline in 2012 cereal production
- Cereal production reached a record level in 2011
- Boosted export availability of cereals in marketing year 2011/12 (July/June) face logistical problems
- Prices of wheat slightly increasing since February

The 2012 cereal production forecast to decrease from the record level of last year

Kazakhstan is the major producer of cereals in Central Asia, mainly wheat, and the bulk of the crop is spring sown in April and May. Planting activities are underway in southern regions and by mid-April cereals have been sown on 29 percent of the total official planned area. However, in the main central growing areas, and some northern parts, soil conditions are not adequate due to moisture deficits, especially in Akmola, Karaganda and Pavlodar oblasts, following insufficient snow during winter. The final outturn will depend on rains in the coming months.

The total area planted under wheat (representing over 85 percent of the cereal production) is officially forecast to decrease by 0.3 million hectares, slightly down on last year's level. The government policy to diversify production of major crops will support the planting of forage crops at the expense of wheat. Lower plantings combined with an expected return to average yields after the high levels of last year, are likely to result in a significant smaller output this season, tentatively forecast one-third below the record level of last season.

Cereal production reached a record level in 2011

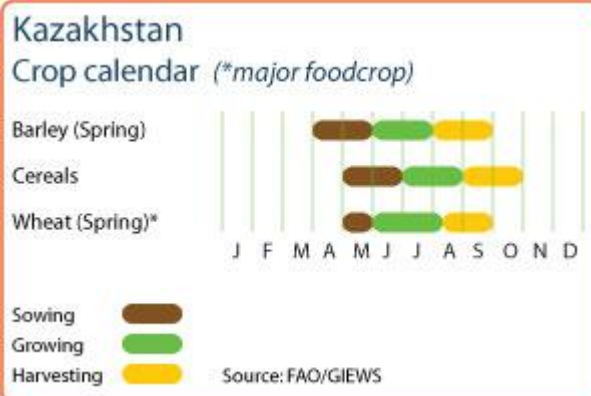
The cereal output more than doubled the drought-affected level of 2010 reaching a level of 26.6 million tonnes, 57 percent above the five-year average. The good production level was achieved despite a slight reduction in planted area, compared with the previous year, as ideal weather conditions with plentiful rainfall in key northern-growing areas, resulted in bumper yields.

Boosted export availability of cereals in marketing year 2011/12 (July/June) face logistical problems

Kazakhstan is a main exporter of cereals, mainly wheat and plays an important role in the subregion food security. The bulk of cereals are traditionally exported to Afghanistan and food deficit countries of Central Asia such as Azerbaijan, Kyrgyzstan, Tajikistan and Uzbekistan.

Exports of wheat are forecast to sharply increase in the 2011/12 marketing year to about 8.5 million tonnes, 55 percent more than the previous year's level. In spite of plentiful supplies, due to its landlocked status and infrastructure constraints, Kazakhstan continues to experience logistical difficulties in getting wheat to export markets.

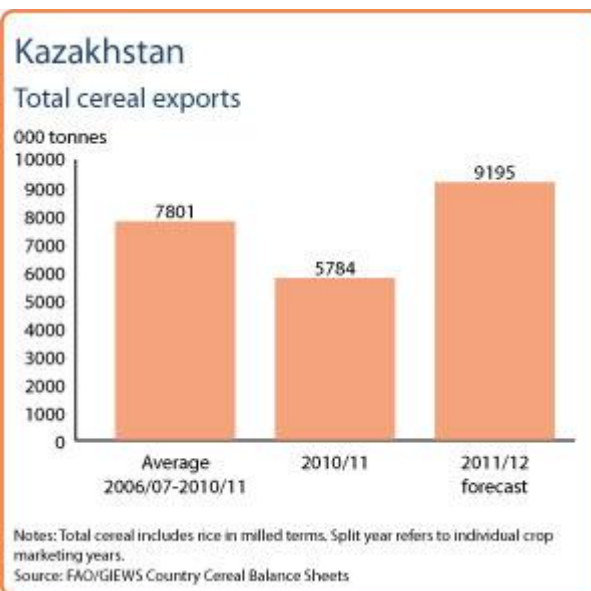
In order to facilitate exports, the Government is providing transportation subsidies for grains to Black Sea and Baltic ports, securing more grain



Kazakhstan Cereal production

	2007-2011 average	2011	2012 forecast	change 2012/2011
	000 tonnes		percent	
Wheat	15 679	22 700	14 500	-36
Barley	2 214	2 600	1 700	-35
Maize	412	482	370	-23
Others	653	788	700	-11
Total	18 958	26 570	17 270	-35

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



rail wagons and considering insurance guarantees of agricultural loans.

Prices of wheat slightly increased since February

Export wheat prices, which significantly declined in the second half of 2011 reflecting last year's record harvest, slightly increased in recorded in the past two months as a result of the early unfavourable crop prospects. In April 2012, wheat prices were 60 percent below their levels at the same period a year earlier, though twice higher than in April 2010.



Reference Date: 13-February-2012

FOOD SECURITY SNAPSHOT

- Cereals production reached a record level in 2011
- Boosted export availability of cereals in marketing year 2011/12 (July/June) face logistical problems

Cold weather and frost affecting 2012 cereal crops in parts

Weather conditions have not been favourable for winter wheat due to extremely cold temperatures that have resulted in frosts. However, the bulk of the cereal crops, including wheat, is planted during spring. The current forecast is that there will not be an increase in the 2012 wheat planting area considering last year's record production, shortages of elevators, storage and transportation equipment.

Cereals production reached a record level in 2011

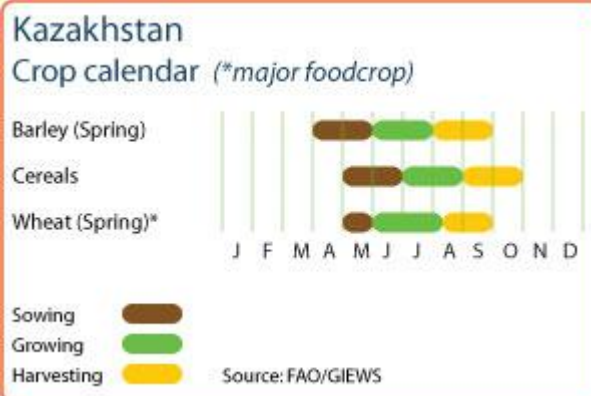
Favourable weather conditions during the cropping season contributed to the bumper cereal output in 2011. It is estimated at some 26.2 million tonnes, more than double the drought-affected level of 2010 and 55 percent above the five-year average. The good level of production was achieved despite a slight reduction in planted area from the previous year as ideal weather conditions, with plentiful rainfall in key northern-growing areas, resulted in bumper yields. Quality concerns over the impact of wet harvest conditions on the quality of the wheat crop did not materialize. Wheat production is estimated at 22.5 million tonnes, 63 percent above the average of the past five years.

Boosted export availability of cereals in marketing year 2011/12 (July/June) face logistical problems

Kazakhstan is a main producer and supplier of cereals, mainly wheat, and plays an important role in regional food security. The bulk of cereals are traditionally exported to Afghanistan and food deficit countries of Central Asia such as Azerbaijan, Kyrgyzstan, Tajikistan and Uzbekistan.

The export of wheat is forecast to surge in the 2011/12 marketing year following the bumper harvest. Wheat exports are forecast to reach about 8.3 million tonnes, 51 percent more than the previous year's level. In spite of plentiful supplies, due to its landlocked status and infrastructure problems, Kazakhstan continues to experience logistical difficulties in getting wheat to export markets.

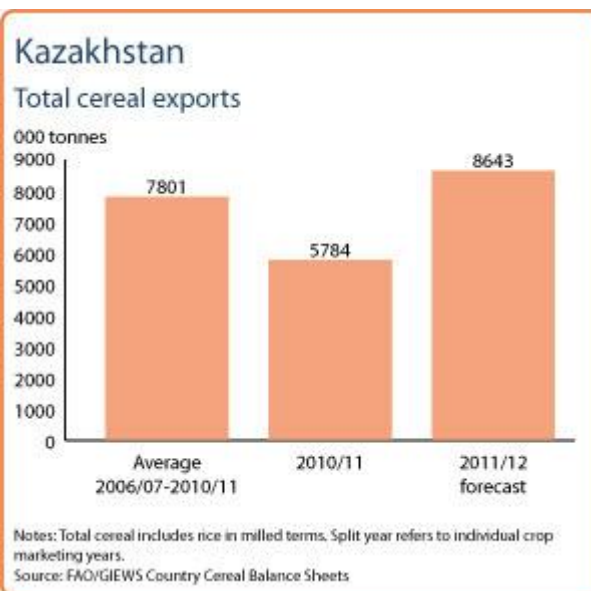
In order to facilitate exports, the Government is providing transportation subsidies for grain to Black Sea and Baltic ports, securing more grain rail wagons and considering insurance guarantees of agricultural loans. However, despite these efforts the logistical problems continue to hamper any larger increases in shipments.



Kazakhstan Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Wheat	13 831	9 638	22 500	133
Barley	2 085	1 450	2 500	72
Maize	398	336	435	29
Others	606	621	785	26
Total	16 920	12 045	26 220	118

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Reference Date: 01-December-2011

FOOD SECURITY SNAPSHOT

- Bumper harvest of cereals in 2011
- Significant increase of export availability in marketing year 2011/12 (July/June)

Bumper harvest of cereals reported in 2011

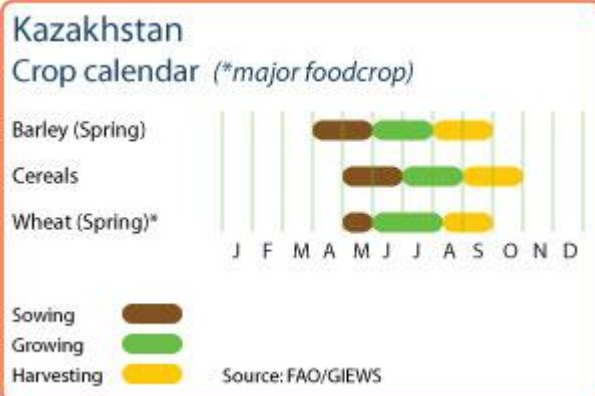
Following favourable weather conditions during the cropping season, aggregate cereal output in 2011 is estimated at some 28 million tonnes, more than double the drought-affected level of 2010 and 66 percent above the five-year average. The good level of production was achieved despite a slight reduction in planted area from the previous year as ideal weather conditions, with plentiful rainfall in key northern-growing areas, resulted in bumper yields. Some quality concerns over the impact of wet harvest conditions on the quality of the wheat crop have not materialized. Of the total cereal output, wheat is estimated to amount to 24 million tonnes, 74 percent above the average of the past five years.

The planting of small 2012 winter cereal crops has been completed. The main wheat crop is planted during spring.

Significant increase of export availability in marketing year 2011/12 (July/June)

Kazakhstan is a main producer and supplier of cereals, mainly wheat in CIS Asia, and plays an important role in regional and global food security. The export of wheat is forecast to surge in the 2011/12 marketing year following the bumper harvest. Wheat exports are forecast to reach about 8.5 million tonnes, 55 percent more than the previous year's level. The surge of export availability in the 2011/12 marketing year (July/June) has been pushing down domestic and export prices in recent months. Despite plentiful supplies, due to its landlocked status and infrastructure problems, Kazakhstan continues to experience logistical difficulties with getting its wheat to export markets. In order to facilitate exports, the Government has announced transportation subsidies for grain to Black Sea and Baltic ports, and has also taken steps to secure more grain rail wagons.

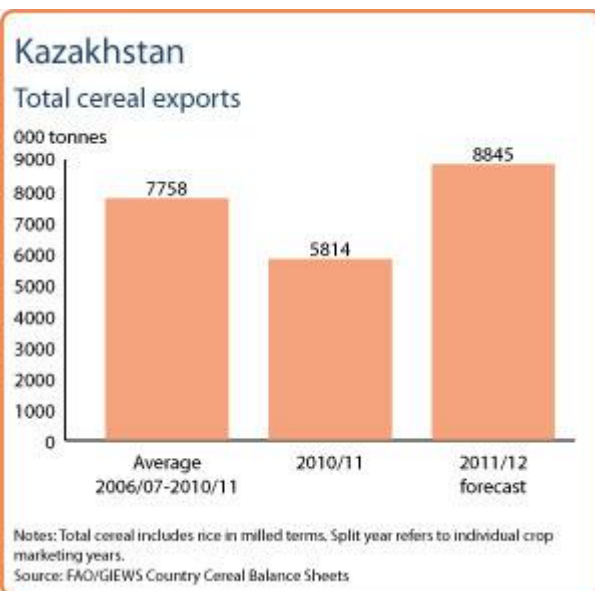
The bulk of cereals are traditionally exported to food deficit countries such as Afghanistan, Azerbaijan, Kyrgyzstan, Tajikistan and Uzbekistan.



Kazakhstan Cereal production

	2006-2010 average	2010	2011 estimate	change 2011/2010
	000 tonnes		percent	
Wheat	13 831	9 638	24 000	149
Barley	2 061	1 330	2 800	111
Maize	398	336	470	40
Others	606	621	785	26
Total	16 896	11 925	28 055	135

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



Reference Date: 25-May-2011

FOOD SECURITY SNAPSHOT

- Early prospects favourable for cereal production in 2011
- Export availability adequate in the current marketing year 2010/11 (July/June)
- Food prices have increased sharply from last year

Early prospects are favourable for cereal production in 2011

Planting of 2011 spring cereal crops, mainly wheat is well advanced in the main growing areas of Akmola, Kostanai, North Kazakhstan and Pavlodar. Spring crops account for 95 percent of the annual wheat production. The official area planted target indicates a level of 16.3 million hectares of cereal, which is slightly below last year's level. In spite of below average precipitation during the first quarter of 2011, soil moisture is reported to be adequate for planting operations, due to the high snow cover melting. The minor 2011 winter cereal crops were not damaged during the winter month this year. Overall, assuming favourable weather during the remaining of the cropping season and a recovery in yields after last year's drought-reduced level, FAO forecasts a total cereal production of 17.5 million tonnes in 2011. This would be significantly above the 2010 level of 12 million tonnes; the bulk of the cereal production is wheat.

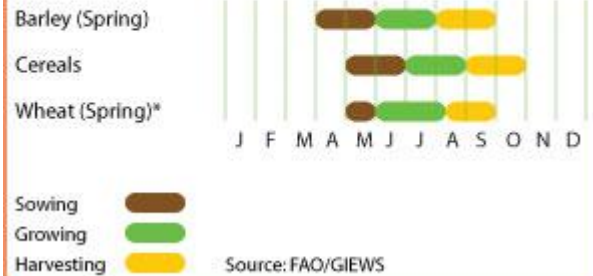
Export availability adequate in the current marketing year 2010/11 (July/June)

Despite last year's sharply reduced production, the wheat exportable surplus in 2010/11 marketing year (July/June) is forecast at 5.5 million tonnes, due to the large carryover stocks from the bumper harvests of 2009 and 2008. By mid-March 2011, export of cereals was reported at 4.6 million tonnes. The country is expected to meet the import demand from traditional markets of Central Asia countries which are highly dependent on cereal imports to cover their consumption needs. Despite the current high international wheat prices, exports from Kazakhstan to the rest of the world are constrained by the inadequate transport infrastructure.

Food prices have increased sharply from last year

The cereals price index increased by 91.3 percent in March 2011 compared with the corresponding month in 2010, while that of bread rose by only 3.3 percent. In the same period, the price index of fruit and vegetables, sugar and meats are reported 23.1 percent, 14.6 percent and 15.1 percent respectively higher.

Kazakhstan Crop calendar (*major foodcrop)

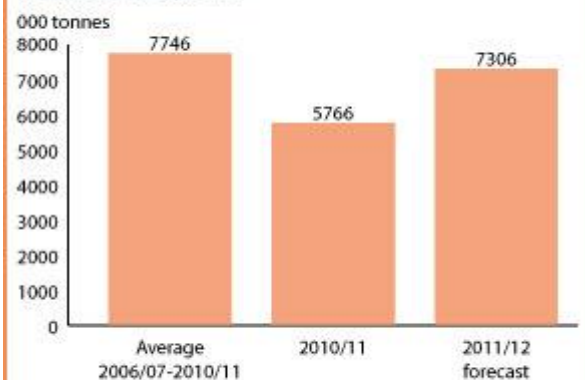


Kazakhstan Cereal production

	2006-2010 average	2010	2011 forecast	change 2011/2010
	000 tonnes		percent	
Wheat	14 573	10 000	14 500	45
Barley	2 061	1 330	2 000	50
Maize	398	336	450	34
Others	303	248	257	4
Total	17 626	12 224	17 517	43

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Kazakhstan Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 12-April-2011

FOOD SECURITY SNAPSHOT

- Plantings of the 2011 spring cereal crops forecast lower than last year
- Export availability adequate
- Food prices have increased sharply from last year

Plantings of the 2011 spring cereal crops forecast lower than last year

Planting of the 2011 spring cereal crops, mainly wheat is underway in the main growing areas of Akmola, Kostanai, North Kazakhstan, and Pavlodar. Spring crops account for 95 percent annual wheat production. Official forecasts of the area planted to grains in 2011 have been revised downwards to 15.9 million hectares, which is some 5 percent lower the 2010 actual level of 16.7 million hectares. In spite of below average precipitation during the first quarter of 2011, soil moisture is reported to be adequate for planting operations, due to the high snow cover melting. The minor winter cereal crops survived winter better than last year, when crops were badly damaged by frosts. Overall, and assuming a recovery in yields after last year's drought-reduced level, the 2011 wheat production is forecast by FAO at around 16 million tonnes, significantly above the 2010 level of 10 million tonnes.

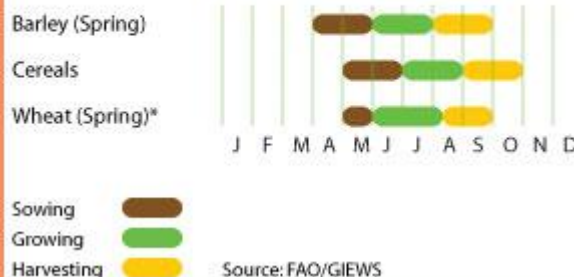
Export availability adequate

Despite last year's sharply reduced production, the wheat exportable surplus in 2010/11 (July/June) is estimated at 6 million tonnes, due to large carry-over stocks from the bumper harvests of 2009 and 2008. By mid-March export of cereals were reported at 5 million tonnes. The country is expected to meet the import demand from traditional markets of Central Asia countries which are highly dependent on cereal imports to cover consumption needs. At the current international prices, exports from Kazakhstan to the rest of the world are constrained by the high transport costs to the Black Sea.

Food prices have increased sharply from last year

In March 2011 compared with the corresponding month in 2010, prices of cereals increased by 91.3 percent but those of bread by only 3.3 percent. In the same period, prices of fruit and vegetables, sugar and meats are reported 23.1 percent 14.6 percent and 15.1 respectively higher.

Kazakhstan Crop calendar (*major foodcrop)

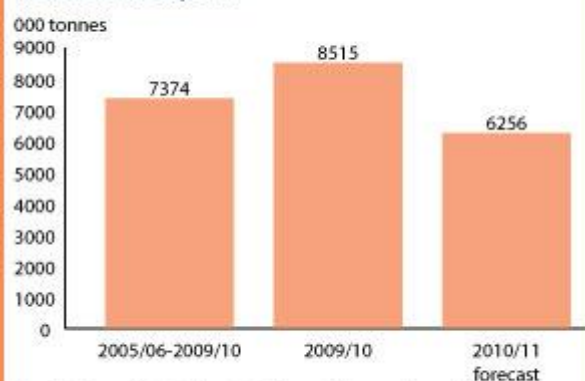


Kazakhstan Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Wheat	14813	17000	10000	-41
Barley	2100	2600	1310	-50
Maize	418	420	320	-24
Others	588	586	558	-5
Total	17919	20606	12188	-41

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Kazakhstan Total cereal exports



Reference Date: 01-September-2010

FOOD SECURITY SNAPSHOT

- The 2010 cereal production drops due to severe drought
- Exports of wheat in 2010/11 around last year's level due to high carry-over stocks

Sharp decrease in 2010 wheat production

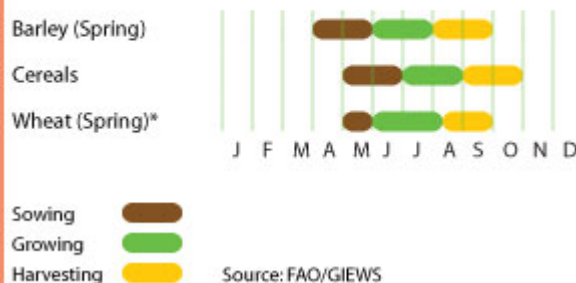
The 2010 cereals production is forecast to decline by 24 percent from last year's record crop to a well below average level of 15.6 million tonnes. The main wheat crop is put at 13 million tonnes, compared with 17 million tonnes in 2009. The decline in cereal output reflects persistent drought from June to mid August that adversely affected spring wheat in the main growing areas of Akmola, Kostanai, and North Kazakhstan. These areas account for three-quarters of the spring wheat, which in turn represents some 80 percent of the annual output.

Export availability adequate

However, the country has ample carry-over stocks and wheat exports in marketing year 2010/11 (July/June) are expected at 7 to 8 million tonnes, similar to the level of 2009/10. The Ministry of Agriculture of Kazakhstan has given indications that the country will not ban grain exports. The estimated exportable surplus is estimated to be sufficient to meet the import demand from traditional markets of Central Asia countries, Afghanistan and Iran and any eventual demand from neighbouring Russia. At the current international prices, exports from Kazakhstan to the rest of the world are constrained by the high transport costs to the Black Sea, particular after the removal of Government's subsidies for transport export grains implemented at the beginning of the year.

No food security issues.

Kazakhstan Crop calendar (*major foodcrop)

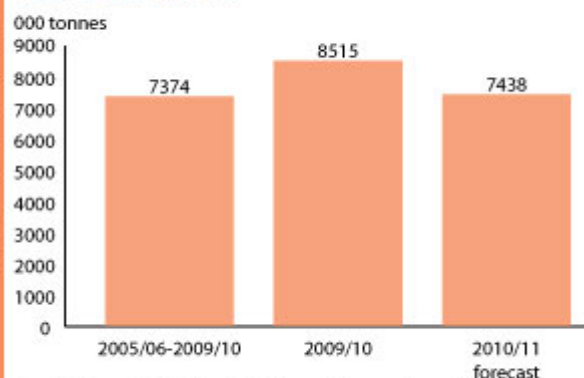


Kazakhstan Cereal production

	2005-2009 average	2009	2010 forecast	change 2010/2009
	000 tonnes			percent
Wheat	14813	17000	13000	-24
Barley	2100	2600	1700	-35
Maize	418	420	400	-5
Others	583	559	538	-4
Total	17914	20579	15638	-24

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Kazakhstan Total cereal exports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets