

## **Kazakhstan Freight And Logistics - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

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### **Report description:**

Kazakhstan Freight And Logistics Market Analysis

The Kazakhstan Freight And Logistics Market was valued at USD 29.30 billion in 2025 and estimated to grow from USD 30.5 billion in 2026 to reach USD 37.24 billion by 2031, at a CAGR of 4.08% during the forecast period (2026-2031).

The growth trajectory is underpinned by Kazakhstan's role in the Belt and Road Initiative, accelerating public-private infrastructure spending, and the steady diversification of export routes through the Trans-Caspian International Transport Route. Rising e-commerce volumes, free-zone incentives, and near-shoring by automotive OEMs further widen demand for multimodal services, while digital customs reforms compress dwell times at key borders. Capacity constraints at Aktau seaport and the Khorgos dry port create attractive investment openings for operators capable of scaling rail, road, and cold-chain assets. Meanwhile, volatile fuel prices and fragmented trucking fleets temper operating margins but accelerate the modal shift toward rail and pipeline options.

Kazakhstan Freight And Logistics Market Trends and Insights

Surge in E-Commerce and B2C Parcel Volumes

Kazakhstan's e-commerce turnover reached KZT 3.2 trillion (USD 6 billion) in 2024, catalyzing last-mile network densification, automated parcel lockers, and rural delivery penetration. Platforms such as Kaspi.kz operate fulfillment across more than 150

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towns, integrating payment and delivery to achieve 96% on-platform order completion. Explosive parcel growth-domestic volumes held 67.11% of CEP demand-propels robotics adoption in urban sortation centers and incentivizes cold-chain micro-hubs for agri-food deliveries. International parcel traffic is expanding faster on the back of streamlined ASTANA-1 customs procedures, compelling integrators to deploy distributed fulfillment models that reduce lead times and carbon footprints.

#### Government Investment in Ports and Free Zones

The National Infrastructure Plan 2024-2029 earmarks 59 transport projects, with port upgrades absorbing the largest allocations. AD Ports Group's USD 775 million expansion of Aktau aims to lift container throughput and embed digital customs gates, while Khorgos Eastern Gate enhances rail transshipment efficiency via new gantry cranes. Preferential tax regimes in special economic zones lure component manufacturers whose just-in-time requirements cascade into demand for high-frequency road and rail shuttle services.

#### Volatile Fuel and Energy Prices

Fuel accounts for up to 35% of line-haul operating costs, and crude price swings undermine rate stability despite Kazakhstan's producer status. Although government policy targets 96.2 million-ton oil output in 2025, refinery outages and global price transmission still lift diesel benchmarks, prompting fleets to hedge or convert to natural gas. Elevated pump prices push shippers toward rail, yet wagon availability caps the extent of modal shift.

Other drivers and restraints analyzed in the detailed report include:

Integration into Africa-Europe Trade Corridors  
Automotive OEM Near-Shoring  
Boosting JIT Demand  
Fragmented Road-Transport Sector

For complete list of drivers and restraints, kindly check the Table Of Contents.

#### Segment Analysis

Wholesale and Retail Trade generated 33.78% of the Kazakhstan freight and logistics market revenue in 2025, underpinned by imported consumer goods and nationwide hypermarket expansion. Omnichannel strategies demand regional DC networks, interactive voice-picking, and returns processing.

Manufacturing posts the swiftest 4.42% CAGR (2026-2031), courtesy of industrial diversification into autos, renewables, and processing. Korean investors in lithium mining and battery packs amplify inbound flows of chemicals and export-ready cathode materials. As plants synchronize with JIT dashboards, logistics providers deploy milk-run shuttles and line-side feed solutions to minimize WIP inventories.

Freight Transport captured 73.65% of the Kazakhstan freight and logistics market in 2025, owing to bulk commodities and transit shipments that rely on road, rail, and pipeline assets. Road preserved a 57.35% slice, but investment in Wabtec locomotives in late-2024 raises rail capacity, improving competitiveness on east-west corridors. The Kazakhstan freight and logistics market size for Freight Transport is projected to expand in tandem with multimodal corridor upgrades linking China to the Caspian.

Growth momentum tilts toward CEP, advancing at a 4.32% CAGR (2026-2031). Domestic parcels dominate today, yet cross-border orders rise in double digits as digital customs slash processing times. Warehousing demand mirrors this shift: temperature-controlled space, just 9.88% of capacity, records a brisk 4.16% CAGR (2026-2031) as pharma and fresh-food exports multiply. Providers with automation, pick-to-light technology, and micro-fulfillment centers secure long-term contracts from

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retailers pivoting to omnichannel models.

The Kazakhstan Freight and Logistics Market Report is Segmented by Logistics Function (Courier Express, and Parcel, Freight Forwarding, Freight Transport, Warehousing and Storage, and Other Services), End User Industry (Agriculture, Fishing, and Forestry, Construction, Manufacturing, Oil and Gas, Mining and Quarrying, Wholesale and Retail Trade, and Others). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

KTZ-Freight Transportation LLC Kazpost JSC KTZ Express JSC Pandora Logistics KM Logistics Hegelmann Multimodal Kazakhstan ALIDI Logistics Zammler Sincer Logistics MKS Kusto logistics NOYTECH Logistics Spark GTrans CTCS Logistics JORI Logistics Rhenus Logistics LX Pantos March Logistics Top Grand Logistics CJ Logistics

Additional Benefits:

The market estimate (ME) sheet in Excel format  
3 months of analyst support

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