

**Voluntary Report** – Voluntary - Public Distribution

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**Report Name:** Uzbekistan Exporter Guide

**Country:** Uzbekistan - Republic of

**Post:** Tashkent

**Report Category:** Exporter Guide

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**Report Highlights:**

Uzbekistan is one of Central Asia's fastest-growing consumer markets, powered by strong GDP growth (6.5 percent in 2024; 5.9 percent forecast in 2025) and a population rising by 1 million annually. Urbanization, a young middle class, and shifting consumer habits are driving rapid demand for modern retail, packaged foods, and convenience formats. The government's 7.4 million metric ton food production target by 2026 unlocks major opportunities for processing, packaging, and cold-chain suppliers. E-commerce and digital payments are reshaping access, especially in cities like Tashkent. Despite infrastructure gaps, Uzbekistan offers a dynamic, high-growth environment for global food and retail investors.

Executive Summary:

Uzbekistan’s nominal GDP reached \$114.9 billion in 2024, with real growth of 6.5% and a projected slowdown to 5.9% in 2025. Strong domestic demand, investment, and remittances support momentum. With over 37 million people, Uzbekistan is the region’s most populous country. GDP per capita is rising, while public debt remains moderate at 36.7% of GDP under a sustainable debt strategy.

Consumer-Oriented Agricultural Imports

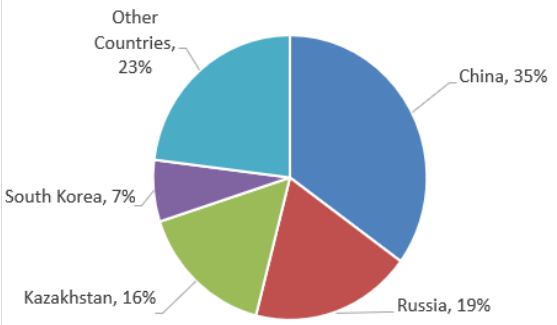


Chart 1: Top Exporting Countries to Uzbekistan, 2023

Food Retail Industry:

Uzbekistan’s food retail sector reached \$12.5 billion in 2023 and is growing 3–4% annually, driven by urbanization and rising incomes. Modern chains and foreign entrants are expanding, with organized retail now accounting for 18% of sales. Growth in logistics and e-commerce offers new opportunities for U.S. exporters.

Food Processing Industry:

Uzbekistan’s food processing sector includes 12,000 firms, mostly small and medium enterprises. It is driven by domestic demand and exports like cottonseed oil and dried fruits. Growth is constrained by outdated equipment and limited cold storage, highlighting the need for investment in technology and infrastructure.

Food Service Industry:

Uzbekistan’s \$1.2 billion food service sector is growing, led by urbanization and rising incomes. While small eateries dominate, international chains like KFC, Domino’s, and Wendy’s are expanding, reflecting strong consumer demand and growing openness to foreign investment.

Quick Facts

Imports of Consumer-Oriented Products

Uzbekistan’s total imports of consumer-oriented agricultural products were \$3.69 billion, reflecting a 5.7 percent increase from the previous year

List of Top 10 Growth Products in Host Country

- Dairy products (including cheese and milk powder)
- Processed snacks and ready-to-eat meals
- Fruit juices and soft drinks
- Confectionery (chocolates, sweets)
- Pet food
- Poultry and beef cuts
- Sauces, condiments, and seasonings
- Health and wellness foods (organic, fortified)
- Nuts and dried fruits
- Bakery and breakfast cereals

Food Industry by Channels (U.S. billion)

Retail Food Industry	\$12.5
Food Service-HRI	\$1.2
Food Processing	\$6.8
Food and Agriculture Exports	\$2.0

Top 10 Host Country Retailers

- Korzinka.uz
- Makro
- Havas
- Carrefour (rebranded under Magnum in 2023)
- Magnum Cash & Carry
- Fix Price
- DeFacto (non-grocery, hybrid lifestyle chain)
- Uzum Market (e-commerce platform expanding into FMCG)
- Frutty (regional grocery chain)
- Farovon.uz (online grocery and specialty foods)

Demographics

Population (millions): 37.5 (2024 estimate)  
GDP (billions USD): \$130.3 (nominal, 2025 estimate)  
GDP per capita (USD): \$3,468 (nominal, 2025 estimate)

Strengths	Weaknesses
<ul style="list-style-type: none"><li>• Strong GDP and income growth from reforms</li><li>• Large, young, and urbanizing population</li><li>• Strategic hub for regional trade</li><li>• Rapid retail and digital expansion</li></ul>	<ul style="list-style-type: none"><li>• Domestic and regional political and economic uncertainties</li><li>• Currency and inflation risks</li><li>• Weak cold chain and storage</li><li>• High logistics costs outside cities</li></ul>
Opportunities	Threats
<ul style="list-style-type: none"><li>• Growing demand for quality, convenient foods</li><li>• Market open to new products</li><li>• Government support for food industry</li><li>• Rising middle class with health focus</li></ul>	<ul style="list-style-type: none"><li>• Lengthy import and customs procedures</li><li>• Strong local food preferences</li><li>• Local processors compete with imports</li><li>• Unpredictable regulations and standards</li></ul>

## I. Market Overview

Uzbekistan, a lower-middle-income country in Central Asia, continues to demonstrate strong economic performance amid broad-based structural reforms and modernization efforts. Nominal GDP reached an estimated \$114.9 billion in 2024, up from \$101.6 billion in 2023, reflecting a 13.1% nominal growth rate. Real GDP grew by 6.5% in 2024 and is projected to moderate to 5.9% in 2025, driven by resilient domestic demand, robust investment activity, and stable remittance inflows. The government remains committed to market-oriented reforms, including foreign exchange liberalization, price deregulation, state enterprise privatization, and tax restructuring.

Uzbekistan's population surpassed 37 million in 2024, with annual growth of approximately 1 million people and a median age of 27 years. Over 50% of the population resides in urban areas, contributing to evolving consumption patterns, especially among the growing middle class. Rising demand for high-quality consumer goods and processed foods is reflected in the expansion of modern retail chains and digital commerce platforms.

The government's reform agenda has led to notable improvements in the investment climate. Uzbekistan ranked 69th out of 190 economies in the World Bank's Ease of Doing Business index. Public debt remains moderate at 36.7% of GDP in 2024, with fiscal discipline supported by a Medium-Term Debt Management Strategy aimed at ensuring debt sustainability and transparency.

Tourism has emerged as a key growth sector, with 10.2 million international visitors in 2024, a 1.5-fold increase from the previous year, bolstered by visa liberalization, cultural tourism, and infrastructure development. Digital transformation is also accelerating under the "Digital Uzbekistan – 2030" strategy, with 83.3% internet penetration and over 34 million online banking users as of early 2024, underscoring the population's rapid adoption of digital financial services.

Despite this progress, Uzbekistan faces persistent challenges. Inflation is projected at 8.8% in 2025, while currency fluctuations may constrain household purchasing power. Structural bottlenecks such as limited cold storage, high logistics costs, and complex import procedures hinder food sector efficiency. Nevertheless, Uzbekistan's strategic location, youthful and growing population, and ongoing reforms position it as one of Central Asia's most promising markets for sustainable economic growth and investment.

Advantages	Challenges
Modern retailers seek high-quality imported products to stand out	U.S. goods are often premium-priced, limiting appeal for price-sensitive consumers
Urban middle class and youth drive demand for new tastes and health trends	Strong local brand loyalty can hinder acceptance of new foreign products
Lifestyle changes boost demand for packaged ready-to-eat/cook foods	Import procedures remain slow and bureaucratic
U.S. products are valued for quality, safety, and innovation	Limited cold chain infrastructure affects handling of perishables
U.S. brands have a strong, modern image among aspirational consumers	U.S. exporters often require large orders; local buyers prefer smaller volumes
E-commerce and delivery services expand access to foreign goods	Regional suppliers benefit from lower costs and greater brand familiarity
Trade liberalization supports imports; U.S.–Central Asia dialogues may improve long-term market access.	Low brand awareness reduces visibility of U.S. products

## II. Exporter Business Tips

### Market Research

Uzbekistan has seen significant market liberalization since 2017, creating new opportunities for foreign exporters. However, entering the Uzbek market successfully requires careful planning and thorough market research. Consumer preferences, distribution systems, and regulatory frameworks can differ substantially from neighboring countries, making it essential to tailor approaches specifically to the local context.

Reliable market intelligence can be difficult to obtain due to limited data transparency and a still-developing commercial infrastructure. For this reason, U.S. exporters are strongly encouraged to partner with experienced local importers or distributors. These partners can provide critical insights into consumer behavior, regulatory requirements, and effective distribution channels, while also helping to navigate administrative and bureaucratic processes.

Cultural and dietary preferences play a significant role in shaping market demand in Uzbekistan. Meat is a staple of the Uzbek diet, with beef, mutton, poultry, and horse meat widely consumed. Due to the country's predominantly Muslim population, most animal products are expected to comply with halal standards. Pork consumption is rare and limited to a small segment of non-Muslim communities.

Uzbek cuisine, rich in history and cultural influences, features popular dishes such as *plov*, *lagman*, and *shashlik*, often served with tea and traditional bread (*nan*). While Western-style food outlets are expanding in urban centers like Tashkent, traditional cuisine continues to dominate daily meals and festive occasions.

Hospitality is a core value in Uzbek culture. Guests are typically welcomed with tea, sweets, and local snacks, while food plays a central role in major holidays and life events. Celebrations such as Navruz, Eid al-Fitr, Eid al-Adha, weddings, and family gatherings are characterized by elaborate meals that may include horse meat, pastries, fruits, sweets, and both alcoholic and non-alcoholic beverages.

### Relationship Building and Business Culture

Successful business engagements in Uzbekistan rely heavily on trust and long-term relationships. Face-to-face interactions remain essential, as personal networks often determine access to opportunities and information. While the business environment is evolving, traditional values continue to influence negotiation, decision-making, and relationship management. Hospitality, including offering tea or refreshments during meetings, is a common practice that helps foster mutual respect and rapport.

### Key Business Etiquette

- *Dress Code*: Conservative and professional attire is expected, particularly in government and formal business settings.
- *Punctuality*: Although meetings may not always start on time, foreign business representatives are expected to be punctual.
- *Language*: Russian remains the language of business due to historical ties, while Uzbek is the official state language and increasingly prevalent in government institutions. Most government websites are published in Uzbek, and officials generally strive to conduct meetings in Uzbek, underscoring the importance of familiarity with the language. English proficiency is expanding, particularly among younger professionals, but remains limited outside major urban centers.

## **Regulatory Environment and Local Partnerships**

Government involvement in business remains significant, reflecting the post-Soviet institutional framework. Recent reforms have improved transparency and streamlined some bureaucratic processes, yet challenges persist. Local partners with industry expertise and established government relationships can facilitate navigation of import regulations, licensing, and distribution logistics, enhancing foreign firms' ability to operate effectively.

## **Market Accessibility**

Uzbekistan is considered a moderately accessible market in Central Asia, with notable progress in improving the business climate through market-oriented reforms. However, further regulatory alignment and infrastructure upgrades are needed to meet global standards. Successful market entry often depends on collaboration with experienced local partners and culturally informed approaches.

Uzbek consumers maintain strong culinary traditions but are increasingly open to global food trends, particularly in urban centers such as Tashkent, Samarkand, and Bukhara. The growing middle class, coupled with the expansion of supermarket chains and increased exposure to international brands, is driving demand for premium, healthy, and convenient food products.

Key trends include:

- Rising demand for packaged, ready-to-eat and ready-to-cook meals, especially among working women and younger consumers.
- Niche but growing interest in organic, health-conscious, and functional foods, constrained by price sensitivity.
- Traditional bazaars still dominate fresh food sales, but modern retail chains such as Korzinka, Makro, Havas, and Makro Express continue to expand across urban areas.
- The tourism boom has increased demand for international cuisine in hotels and restaurants, further exposing consumers to new tastes and preferences.
- E-commerce and online food delivery have accelerated post-pandemic, especially among urban youth with access to smartphones and digital payments.

Despite openness to foreign products, many consumers remain price-sensitive, particularly outside major cities. Factors such as brand trust, halal certification, packaging quality, and shelf life significantly influence purchasing decisions.

For U.S. suppliers, the expansion of Western franchise restaurants and upscale hotel chains (e.g., Marriott, Hilton, Wyndham) is generating steady demand for imported ingredients, including sauces, beverages, and specialty foodservice products. The hospitality sector's diversification into international and vegetarian cuisines offers market entry points for high-quality U.S. products such as beef cuts, dairy items, frozen potato products, and wines. Establishing reliable distribution channels to serve these growing segments - particularly quick-service chains - represents a promising opportunity for U.S. exporters.

## **III. Import Food Standards, Regulations, and Procedures**

Uzbekistan has made notable progress in modernizing its trade regime and aligning food import standards with international norms. As part of its WTO accession process, the government is

harmonizing regulations related to food safety, labeling, and customs procedures. U.S. exporters should work closely with local importers to ensure full compliance with relevant laws.

### Customs Clearance

Customs operations are managed by the State Customs Committee of Uzbekistan and processed electronically through the Single Window System for Export-Import Operations. Importers must be registered with tax authorities and possess a valid customs code. While clearance times have improved, particularly for established traders, first-time importers may face occasional delays due to incomplete documentation.

### Required Import Documents for Food Products

For customs clearance, the following documents are generally required:

- Import contract
- Invoice and packing list
- Bill of lading or airway bill
- Certificate of origin
- Phytosanitary or veterinary certificate (for plant and animal products)
- Certificate of conformity (where applicable)
- Product composition and ingredient list
- Completed customs declaration

U.S. exporters should verify up-to-date requirements with their Uzbek partners and consult relevant trade portals.

### Labeling Requirements

Labels must be clearly legible and affixed to the product or its packaging. Non-compliant labels may lead to rejection at the border. All imported food products must have labels in Uzbek (Cyrillic or Latin) or Russian, including:

- Product name
- Manufacturer's name and address
- Country of origin
- Expiry or best-before date
- Full list of ingredients
- Storage conditions
- Nutritional information (where applicable)
- Certification marks (e.g. Halal)

U.S. exporters should always confirm the latest requirements with their local importer or distributor prior to shipment, as regulations may change without notice.

### Tariffs and Trade Agreements

Uzbekistan follows EAEU-based customs classifications but is not yet a full EAEU member. It applies to the Harmonized System (HS) and enforces Most-Favored Nation (MFN) tariff rates ranging from 5-30 percent for food products. Some items may face seasonal duties.

Trade preferences include:

- CIS free trade agreements
- Observer status in the Eurasian Economic Union (EAEU)
- GSP+ beneficiary under the EU trade preferences
- WTO membership negotiations are ongoing

For tariff schedules and product-specific duties, consult resources such as the [WTO Tariff Profiles](#) or the local government.

### Trademarks and Intellectual Property

Uzbekistan is a member of the Paris Convention and the Madrid Agreement for IP protection. Trademarks and patents should be registered with the Intellectual Property Agency of Uzbekistan. While enforcement of IP rights is improving, inconsistencies remain. Foreign companies are advised to register brand assets early and work with local legal counsel for monitoring and enforcement.

## **IV. Market Sector Structure and Trends**

### **Sector Overview and Market Entry Opportunities**

#### Food Retail

Uzbekistan's food retail sector is undergoing rapid modernization, driven by rising incomes, urbanization, demographic growth, and evolving consumer preferences. In 2023, total food retail sales were estimated at \$12.5 billion, with annual growth projected at 3–4% through 2025. Retail turnover increased by 9.3% in early 2024, supported by expansion of modern formats such as supermarkets and hypermarkets and a gradual shift away from traditional bazaars, which still dominate rural markets.

Major domestic chains—including Korzinka, Makro, and Havas—now account for 18% of formal food retail sales, while foreign investment is accelerating. Korzinka secured a \$25 million IFC loan in 2024 to enhance cold-chain and logistics capacity. Regional and global players are also entering the market: Magnum (Kazakhstan) acquired Carrefour's local assets and plans 10 new stores; SPAR (Netherlands) is partnering with Korzinka; Galmart opened its first store in Tashkent; and KK Super Mart (Malaysia) is launching convenience stores and a trading hub.

The online grocery segment is expanding, with projected revenues of \$30.5 million by 2025, comprising 7.1% of total e-commerce, and forecasted to grow at a 13.1% CAGR through 2029. Investments in logistics, cold-chain systems, and digital platforms are facilitating this shift. These trends are opening new opportunities for U.S. exporters to introduce high-quality, branded products into modern retail and e-commerce channels.

#### Food Service

Uzbekistan's commercial foodservice industry is poised for significant expansion through 2031, driven by urban growth, rising disposable incomes, and a resilient tourism sector. In 2023, foodservice sales were estimated at \$1.2 billion, reflecting steady growth supported by an expanding middle class and changing consumer lifestyles. While the market remains dominated by small independent restaurants and cafes, both full-service and quick-service formats are scaling to meet demand for greater variety and convenience.

International fast-food chains are steadily increasing their footprint, particularly in urban centers like Tashkent and Samarkand, signaling greater openness to foreign investment. KFC leads with 27 outlets

nationwide, while Domino’s Pizza launched in 2024 and is actively expanding. Wendy’s has four locations in Tashkent and plans to grow to 20 outlets by 2030, and Burger King is expected to enter the market in 2025. These developments reflect rising consumer appetite for global brands and support Uzbekistan’s broader economic modernization and service-sector diversification.

**Food Processing**

Uzbekistan’s government aims to increase total food production to 7.4 million tons by 2026, supported by investments in processing capacity for dairy, meat, fruits, and vegetables. This presents strong opportunities for suppliers of processing machinery, packaging technologies, and food ingredients as domestic producers modernize and expand. The sector includes around 12,000 registered firms, with 70% classified as SMEs employing fewer than 50 people, primarily focused on processing cotton, fruits, vegetables, and meat.

Approximately 75% of processed food is consumed domestically, driven by growing urban populations and demand for packaged and ready-to-eat foods. The remaining 25% is exported, with cottonseed oil and dried fruits as key products. However, outdated equipment, limited packaging options, and insufficient cold storage infrastructure continue to constrain growth. Targeted investments in technology, food safety, and logistics are essential to improve product quality and boost export competitiveness.

**Market Entry Strategy**

U.S. exporters are encouraged to collaborate with local distributors who understand the regulatory and cultural landscape. In addition, participation in industry trade shows (e.g. AgroExpo Uzbekistan) and leveraging digital platforms can strengthen brand recognition and support effective market entry.

Date	Show Name	Description	Location
November 2025 (TBD)	<u>FoodWeek Uzbekistan</u>	Large Uzbek food industry trade show with a focus on drinks, food, ingredients, packaging, equipment	Tashkent, UZ
October 2025 (TBD)	<u>HoReCa Uzbekistan</u>	HoReCa (Hotel, Restaurant, and Café) is an Uzbek trade fair focused on these hospitality sectors: drinks, bar equipment, tea and coffee, and franchising	Tashkent, UZ
November 2025 (TBD)	<u>UzAgroExpo</u>	One of the largest Central Asian trade shows with emphasis on innovations in machinery, seed, feed, grain, and livestock	Tashkent, UZ
2025	<u>AgroWorld Uzbekistan</u>	Large international agriculture exhibition showcasing machinery, equipment, and technology for the poultry, livestock, and veterinary sectors	Tashkent, UZ

**Consumer-Oriented Product Prospects**

Urban consumers, particularly younger, middle-income segments, are increasingly seeking diverse, convenient, and health-conscious food options. This shift in demand is influenced by changing lifestyles, greater exposure to global food culture, and improved access to modern retail outlets. Key growth categories include:

- Packaged and ready-to-eat meals: rising demand is driven by time-constrained Packaged consumers in urban areas seeking convenience and consistent quality.
- Health and wellness products: growing interest in organic, low-sugar, and fortified foods reflects increasing health awareness among younger consumers.
- International cuisine ingredients: demand is expanding for global flavors, including sauces,



- seasonings, and specialty products tied to Western, Asian, and Middle Eastern cuisines.
- Halal-certified products given Uzbekistan's predominantly Muslim population, halal certification remains essential for consumer trust and market acceptance across all product categories.

These trends highlight emerging market opportunities for U.S. exporters offering differentiated, certified, and high-quality consumer-oriented goods.

### **Retailer Information and Sector Growth**

Uzbekistan's modern retail sector is growing steadily, driven by chains like Makro, Korzinka, and Havas. Investments in supply chains, private labels, and digital services support expansion. Growth is fueled by rising consumer spending, urbanization, and increased use of e-commerce.

### **Best Prospects for U.S. Exporters**

#### ***Beverages***

Uzbekistan's beverage market is experiencing rapid growth, driven by rising incomes, urbanization, and shifting consumer preferences. From 2019 to 2024, imports of non-alcoholic beverages, including carbonated drinks, flavored waters, specialty teas, and energy drinks, increased nearly ninefold, reflecting strong demand among younger consumers for novel, health-conscious, and premium products.

Starting January 1, 2025, Uzbekistan reduced excise taxes on imported alcohol: by 25% for vodka, cognac, and other spirits, and by approximately 51% for wine and beer. A unified rate for ethyl alcohol was introduced — 15,000 Uzbek soums per liter (1.2 USD). Alcoholic beverage imports have grown significantly, led by wine, spirits (e.g., whiskey, vodka), and craft beers. Notably, wine imports have more than tripled over the same period.

While the total beverage market now exceeds an estimated \$700 million annually, the U.S. share remains limited - approximately 1 percent in wine and less than 0.5 percent in non-alcoholic beverages - highlighting untapped potential for high-end and specialty U.S. brands aligned with global trends in premiumization, craft production, and functional health beverages.

To improve market penetration, U.S. suppliers should consider:

- Participating in local trade fairs
- Launching targeted marketing campaigns
- Forming partnerships with local distributors and modern retail chains

These efforts would help increase visibility and appeal among a growing base of aspirational and globally minded consumers.

#### ***Feed and Feed Additives***

Uzbekistan's livestock sector is expanding rapidly as part of the country's broader agricultural modernization agenda. Government-led efforts to boost meat and dairy production have increased demand for high-quality feed and additives. Since 2019, imports of feed and additives have doubled, driven by the growth of commercial cattle ranching and rising standards in livestock nutrition.

Despite being a global leader in feed additive innovation, the United States currently supplies less than 3 percent of Uzbekistan's feed market - highlighting a significant untapped opportunity. There is growing demand for formulations that enhance animal health, productivity, and product quality.

As Uzbekistan tightens its focus on food security and quality assurance, U.S. exporters offering scientifically formulated, certified feed products are well-positioned to benefit. Aligning with evolving regulatory and veterinary standards, and engaging with local producers and government partners, will be key to market entry and growth.

### ***Planting Seeds***

Uzbekistan's agricultural sector is undergoing modernization, with growing emphasis on productivity gains and crop diversification. The country's continental climate - characterized by hot summers and cold winters - closely mirrors parts of the U.S. Midwest, making American seed varieties for wheat, corn, lentils, sunflower, and linseed well-suited to local conditions.

Between 2019 and 2024, Uzbekistan's imports of planting seeds increased by approximately 155 percent, reflecting rising demand for higher-yield varieties. However, the U.S. share of the market declined from 7.1 to 3.8 percent, largely due to stricter GMO regulations and biosafety compliance requirements.

To regain competitiveness, U.S. seed exporters must navigate evolving regulatory barriers, including GMO registration and biosafety protocols. Active engagement with regulatory bodies and potential collaboration on bioengineering standards will be essential.

At the same time, demand for non-GMO and organic seed varieties is growing, creating potential niche opportunities for U.S. suppliers. The government's renewed focus on food self-sufficiency and export competitiveness further underscores the role of advanced seed technologies in supporting agricultural transformation.

### ***Pet Food (Dog and Cat Food)***

Driven by rising disposable incomes, rapid urbanization, and evolving cultural attitudes toward pet ownership, Uzbekistan's pet food market is expanding at a remarkable pace. Since 2019, imports of dog and cat food have surged more than fourfold, reflecting a strong and growing demand among urban middle-class consumers for premium, natural, and health-oriented pet nutrition.

Despite this momentum, U.S. pet food brands have yet to establish a meaningful presence in the market. This gap presents a compelling opportunity for U.S. exporters to introduce high-quality products- especially those featuring organic ingredients, grain-free recipes, and holistic health benefits.

To succeed, U.S. companies should prioritize building partnerships with local retailers and leveraging the country's growing e-commerce platforms to connect directly with consumers.

### ***Bovine Genetics***

Modernizing Uzbekistan's cattle industry is central to the country's broader agricultural and rural development agenda. As demand rises for higher-performing, disease-resistant, and climate-adapted herds, interest in advanced bovine genetics has grown substantially.

While the import of live cattle remains costly and logistically complex, the country has seen a fourfold increase in imports of bovine semen and embryos over the past four years. This trend signals a clear shift toward scalable, science-driven herd improvement.

U.S. bovine genetics, recognized for their high productivity in temperate and steppe climates, offer a compelling value for Uzbek breeders. Growth opportunities for U.S. exporters include collaborating with local breeding initiatives and aligning with national subsidies that support genetic improvement. To fully realize this potential, streamlined customs procedures, reliable veterinary inspection protocols, and timely health certification processes will be critical.

### *Additional Considerations*

- **Regulatory environment:** Uzbekistan continues to reform agricultural and trade regulations, aiming to harmonize standards with international norms. U.S. exporters should closely monitor updates from the Ministry of Agriculture, the State Customs Committee, and the Ministry of Health to ensure compliance and take advantage of new trade facilitation measures.
- **Trade agreements and tariffs:** Uzbekistan is a member of the Eurasian Economic Union (EAEU) customs regime and benefits from preferential trade agreements. Understanding tariff classifications and leveraging trade facilitation agreements can reduce entry costs for U.S. exporters.
- **Digital and E-commerce channels:** E-commerce and digital marketing are emerging as key platforms for food and beverage sales in Uzbekistan, particularly among younger consumers. U.S. exporters should consider online channels and digital partnerships to build brand presence efficiently.

## **V. Agricultural and Food Imports – Uzbekistan**

### **Rapidly Expanding Import Segments**

Uzbekistan's agri-food import sector has witnessed significant expansion in recent years, reflecting structural changes in domestic demand, shifts in dietary preferences, and the government's trade liberalization efforts. Notably, several product categories are experiencing robust import growth:

- **Fruits and vegetables:** Imports in this category reached an estimated \$2.2 billion in 2024, representing a year-on-year increase of 22.4 percent. This trend is attributed to rising domestic consumption, increasing urban demand for diverse produce, and seasonal supply limitations. Additionally, the sector is supported by a 32.5 percent rise in regional fruit and vegetable exports, facilitating cross-border trade integration.
- **Vegetable oils:** Demand for vegetable oils has continued to rise, driven by both health-oriented consumer trends and their extensive use in food processing and industrial applications. Growth in this sector also reflects limited domestic oilseed production capacity, creating reliance on external suppliers.
- **Processed foods:** Imports of processed food items—such as snack foods, packaged meals, and instant products—have grown significantly. This increase aligns with shifting consumer preferences toward convenience, especially among urban and working populations, and underscores a broader nutritional transition.

### **Agricultural and Food Import Statistics**

According to trade data from 2024, Uzbekistan's total merchandise imports were valued at \$55.5 billion, marking a substantial 51 percent increase over the previous year. Agricultural imports constitute a significant and growing share of this total. Key categories include:

- **Staples:** Wheat, wheat flour, rice, and other cereals continue to be vital imports due to domestic production shortfalls and variable climatic conditions.
- **Essential Commodities:** Imports of sugar, vegetable oils, and tea remain essential to meet domestic demand.
- **Protein Sources:** Meat products, including beef and poultry, are increasingly imported to meet rising consumption needs.

The growing reliance on agri-food imports signals both opportunities and vulnerabilities. While it supports food availability and diversity, it also underscores the need for investments in domestic agricultural productivity and supply chain infrastructure.

### High-Potential Consumer-Oriented Product Categories

As Uzbekistan's economy continues to diversify and its urban middle class expands, there is increasing demand for high-value, consumer-oriented food products. These trends present notable opportunities for exporters, particularly from the United States and other high-standard markets. Promising product categories include:

- **Dairy products:** Including cheese, yogurt, and milk powders, which cater to both retail consumers and the food service sector.
- **Meat products:** Beef and poultry remain in high demand, particularly among urban households seeking premium and varied protein sources.
- **Snack foods and confectionery:** Chips, nuts, chocolates, and other ready-to-consume items are becoming staples in urban diets.
- **Beverages:** Fruit juices, carbonated soft drinks, and bottled water show strong growth, aligned with lifestyle changes.
- **Organic and health-focused products:** Health-conscious segments are emerging, especially in urban centers, with growing interest in sugar-free, organic, and fortified food options.

The rise in demand for these products reflects broader shifts in consumer behavior, including an increased preference for quality, safety, and nutritional value. As Uzbekistan continues to reform its food safety and quality standards, this may further incentivize the import of high-standard international products.

## VI. Key Contacts and Further Information

Agency	Website
Ministry of Agriculture	<a href="http://www.agro.uz">www.agro.uz</a>
Ministry of Health	<a href="http://www.gov.uz/ssv">www.gov.uz/ssv</a>
State Customs Committee	<a href="http://www.customs.uz">www.customs.uz</a>
Ministry of Investment, Industry and Trade	<a href="http://www.miit.uz">www.miit.uz</a>
Open Data Portal	<a href="http://www.data.egov.uz">www.data.egov.uz</a>
Uzbekistan Trade Information Portal	<a href="http://www.uztradeinfo.uz">www.uztradeinfo.uz</a>
Investment Promotion Agency	<a href="http://www.invest.miit.uz">www.invest.miit.uz</a>
Intellectual Property Agency of Uzbekistan	<a href="http://www.ima.uz">www.ima.uz</a>
State Customs Committee – Transit Division	<a href="http://www.customs.uz">www.customs.uz</a>

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**Attachments:**

No Attachments.