Uzbekistan Feed Raw Materials Overseas Market Analysis Report

Target Country: Uzbekistan | Main Category: Feed Raw Materials | Report Updated: July 1, 2026

Uzbekistan Feed Raw Materials: Key Conclusions

Uzbekistan's livestock industry continues to expand, with annual feed raw material demand reaching approximately 3.7 million tons and protein raw material import dependence at about 35%. Locally produced cottonseed meal serves as a critical pillar, but the import gap for soybeans and soybean meal continues to widen, with imports up roughly 12% year-on-year in 2024. Chinese soybean meal exports to Uzbekistan are on an upward trend, with Central Asian supply chain stability and exchange rate risks being the primary concerns.

Annual Feed Raw Material Demand ~3.7 million tons

Protein Raw Material Import Dependence ~35%

2024 Import Volume YoY ▲ +12%

China Soybean Meal Export Trend to Central Asia ▲ Sustained Growth

Sources: World Bank Uzbekistan Agriculture Brief (March 2025); FAO Central Asia Feed Market Report (December 2024); China General Administration of Customs Export Statistics (Full Year 2024)

Supply and Demand Fundamentals

Uzbekistan's feed raw material supply and demand are in a tight balance. Locally produced cottonseed meal and wheat bran form the mainstay of supply, but the high-protein raw material deficit must be filled by imports. In 2024, domestic output was approximately 2.8 million tons, supplemented by around 0.9 million tons in imports, with total consumption at roughly 3.7 million tons—up around 7% year-on-year—driven primarily by livestock feed demand.

Indicator	Volume (Million Tons)	YoY Change
Domestic Feed Raw Material Output	~2.8	+5%
Imported Feed Raw Material Volume	~0.9	+12%
Total Consumption	~3.7	+7%
Of Which: Protein Raw Material Consumption	~1.1	+10%

Sources: Uzbekistan Ministry of Agriculture Public Data (February 2025); FAO Food Outlook (November 2024); World Bank Database

China Market Status

China's feed raw material market operated smoothly overall in 2024, with soybean meal prices fluctuating between RMB 3,000–3,800/ton and easing towards year-end amid expectations of a bumper South American soybean harvest. Corn prices ranged between RMB 2,200–2,600/ton. Exports of feed additives and premixes continued to grow, with shipments to Central Asia up approximately 15% year-on-year.

Soybean Meal (2024 Average Price) ~RMB 3,400–3,600/ton

Corn (2024 Average Price) ~RMB 2,300–2,500/ton

Feed Additive Exports YoY ▲ +15%

Feed Industry Operating Rate ~68–72%

Sources: 100ppi.com Feed Raw Materials Channel (December 2024); Sublime China Information Soybean Meal Annual Report (January 2025); China General Administration of Customs

Uzbekistan Market Status

Uzbekistan has relatively abundant local cottonseed meal supply, with annual output of approximately 0.7–0.85 million tons, forming the foundation of protein feed. However, soybeans and soybean meal are heavily import-dependent, with key supplier countries being Russia, Kazakhstan, and China. The CIF price of imported soybean meal carries a premium of roughly 8–15% over Chinese production-area prices, with freight and Central Asian logistics costs being the main markup factors.

Local Cottonseed Meal Annual Output ~0.7–0.85 million tons

Soybean Meal Import Dependence ~40%

Imported Soybean Meal CIF Premium +8%–15%

Main Import Source Countries Russia, Kazakhstan, China

Sources: Uzbekistan State Statistics Committee (March 2025); CAREC Agricultural Trade Report (October 2024)

Product Segment Breakdown

Among imported feed raw material categories, protein feed accounts for the largest share at roughly 55%, followed by energy feed at approximately 30%, and minerals and additives at about 15%. Cottonseed meal represents the largest single local protein source, while soybean/soybean meal imports are growing the fastest, and corn imports continue to rise due to insufficient domestic output.

Sub-Category	Annual Import Volume (Million Tons)	Demand Trend
Soybeans / Soybean Meal	~0.25–0.30	▲ Growing
Corn	~0.15–0.20	▲ Growing
Feed Additives	~0.05–0.08	▲ Growing
Cottonseed Meal (Local)	~0.70–0.85	→ Stable

Sources: FAO STAT Database (2024); Uzbekistan Customs Import and Export Statistics (February 2025)

Core Finished Product Supply and Demand

Uzbekistan's compound feed and concentrate feed output has been steadily increasing, with compound feed production reaching approximately 2 million tons and concentrate feed around 0.5 million tons in 2024. However, high-protein concentrate feed still faces a supply-demand gap of roughly 0.15–0.2 million tons, constrained mainly by dependence on imported high-quality protein raw materials.

Annual Compound Feed Output ~2 million tons

Annual Concentrate Feed Output ~0.5 million tons

Concentrate Feed Supply-Demand Gap ~0.15–0.2 million tons

Number of Feed Processing Enterprises ~180 (including SMEs)

Sources: Uzbekistan Feed Industry Association Report (January 2025); Alltech Global Feed Survey (2024 Edition)

Intermediate Goods and Raw Material Value

The cost transmission chain from raw materials to feed is clear: Chinese production-area soybean meal (RMB 3,400–3,600/ton) sees its landed cost rise to approximately RMB 3,900–4,200/ton after overland transport to Uzbekistan. Local cottonseed meal enjoys a significant cost advantage at around RMB 1,800–2,200/ton, serving as the key anchor for controlling total feed cost. Logistics costs account for 12–18% of the imported raw material landed price.

Product	China Production-Area Price (RMB/ton)	Uzbekistan CIF Price (RMB/ton)
Soybean Meal	3,400–3,600	3,900–4,200
Corn	2,300–2,500	2,700–2,950
Cottonseed Meal (Local)	—	1,800–2,200

Sources: 100ppi.com (December 2024); Central Asia Logistics Cost Survey (Mysteel, March 2025); previous values cited, no latest monthly public data

Trade and Macroeconomic Indicators

Uzbekistan's macroeconomy remains stable, with GDP growth of approximately 5.5% in 2024 and agriculture accounting for about 24% of GDP. Bilateral trade between China and Uzbekistan has surpassed USD 12 billion. Import tariffs on feed raw materials are relatively low (mostly 0–5%). The Soum-to-USD exchange rate fluctuation is a key variable affecting import costs.

GDP Growth (2024) ~5.5%

Agriculture as % of GDP ~24%

China-Uzbekistan Bilateral Trade Volume ~USD 12 billion

Feed Raw Material Import Tariffs 0%–5% (most categories)

USD to Soum (2024 Average) ~1:12,600

Sources: World Bank (January 2025); China General Administration of Customs; Central Bank of Uzbekistan Exchange Rate Bulletin (December 2024)

Risks and Opportunity Windows

⚠ **Risk Alert:** Soum exchange rate volatility may significantly affect import costs; occasional disruptions in Central Asian geopolitics and transit transport pose supply chain risks; global soybean prices have upside potential due to climate impacts and major producer-country policies.

Opportunity Windows: The Uzbekistan government encourages livestock industry modernization, creating rigid growth in feed demand; China-Uzbekistan bilateral relations are strong, with Chinese feed raw material exports benefiting from tariff preferences; substantial import substitution and investment potential exist in local cottonseed meal deep processing and the high-end feed additive sector.

Livestock Policy Support Continued strengthening 2025–2030

China-Uzbekistan Trade Facilitation Tariff preferences + land corridor upgrades

Sources: Presidential Decree of Uzbekistan (September 2024); ADB Central Asia Economic Outlook (April 2025); MOFCOM China-Uzbekistan Economic and Trade Cooperation Brief

Data Source Summary (at least 5 independent sources)

1. World Bank — Uzbekistan Agriculture Brief and Database (January–March 2025)
2. FAO (Food and Agriculture Organization) — Food Outlook and STAT Database (November–December 2024)
3. China General Administration of Customs — Import and Export Statistics (Full Year 2024)
4. 100ppi.com — Feed Raw Materials Channel Price Monitoring (December 2024)
5. Sublime China Information (Zhuochuang) — Soybean Meal Annual Report and Feed Industry Data (January 2025)
6. Uzbekistan State Statistics Committee — Agriculture and Trade Public Data (March 2025)
7. Mysteel — Central Asia Logistics Cost Survey (March 2025)
8. Asian Development Bank — Central Asia Economic Outlook (April 2025)
9. Alltech — Global Feed Survey (2024 Edition)
10. Uzbekistan Feed Industry Association — Industry Report (January 2025)