Uzbekistan Agrochemical Overseas Market Analysis Report

Target Country: Uzbekistan

Main Category: Agrochemicals (Fertilizers · Pesticides · Intermediates)

 Report Update Date | July 1, 2026

Uzbekistan Agrochemicals Key Conclusions

> Uzbekistan's agrochemical market is highly dependent on imports, with total fertilizer imports reaching approximately USD 420 million in 2025. Potash and phosphate fertilizers face the largest structural deficits, and China is the second-largest supply source. In 2026, DAP FOB quotes from China remain in the USD 580-610/tonne range. Logistics costs and exchange rate volatility pose the main risks.

Fertilizer Import Dependency	**≈55%-60%**
2025 Fertilizer Import Value	**≈USD 420 million**
China DAP FOB (2026.06)	**580-610 USD/tonne**

⚠ Risk Alert: Suez Canal route disruptions may push up marine insurance premiums, affecting Central Asian land transport substitution costs.

Source: State Statistics Committee of Uzbekistan, Argus Media Fertilizer Weekly Report June 2026

Supply and Demand Fundamentals

> Uzbekistan's annual fertilizer consumption is approximately 3.2-3.5 million tonnes (physical volume), with domestic production covering only about 40%-45%. Nitrogen fertilizer self-sufficiency is relatively high, but potash is almost entirely imported, and phosphate fertilizer import dependency exceeds 60%.

Indicator	Data	Year
Apparent Fertilizer Consumption	≈3.35 million tonnes	2025
Domestic Fertilizer Production	≈1.45 million tonnes	2025
Net Fertilizer Imports	≈1.90 million tonnes	2025
Potash Import Dependency	≈98%	2025

Source: Ministry of Agriculture of Uzbekistan, FAO STAT 2026 updated data

China Market Status

> In Q2 2026, China's phosphate fertilizer operating rate remained at 68%-72%, with DAP export quotes steady to firm. Affected by domestic supply guarantee policies, the statutory inspection period for exports has been extended, but exports to Belt and Road countries such as Uzbekistan remain smooth.

DAP Operating Rate (2026.06) **≈70%**

Urea FOB China (2026.06) **340-355 USD/tonne**

Phosphate Rock 28% P2O5 Mine-Mouth Price (Hubei) **≈980 RMB/tonne**

Source: Longzhong Information Phosphate Fertilizer Weekly June 2026, SunSirs Price Alert July 1, 2026

Uzbekistan Market Status

> Local fertilizer retail prices in Uzbekistan are driven by import costs. In June 2026, DAP CIF landed cost was estimated at approximately USD 650-690/tonne. The main import source countries are Russia, China, and Kazakhstan, with China accounting for about 22% of urea and phosphate import share.

DAP CIF Uzbekistan (Est.) **650-690 USD/tonne**

Largest Supplier **Russia**

China's Share of Uzbek Fertilizer Imports **≈22%**

Source: State Customs Committee of Uzbekistan 2025 Annual Trade Report, Argus FSU Fertilizer June 2026

Product Segmentation Structure

Uzbekistan's agrochemical imports are dominated by potash, phosphate, and compound fertilizers. Pesticide import volume is smaller but growing rapidly; in 2025, pesticide imports reached approximately USD 180 million, led by herbicides and insecticides.

Category	2025 Import Volume (10k tonnes)	YoY Change
Potash Fertilizer	≈62	↑4%
DAP	≈48	↑2%
Compound Fertilizer	≈35	↓1%
Pesticides (Technical + Formulations)	≈2.1	↑8%

Source: UN Comtrade 2025, Uzbekistan Customs Q1 2026 Briefing

Core Product Supply and Demand

DAP is the core fertilizer for cotton and wheat cultivation in Uzbekistan. In 2025, domestic production was under 200,000 tonnes, with imports at approximately 480,000 tonnes, indicating a significant supply-demand gap. Inventory levels remain low, and trader restocking willingness is suppressed by high prices.

DAP Domestic Production **≈180,000 tonnes**

DAP Imports **≈480,000 tonnes**

Port/Inland Inventory Days **25-35 days**

Source: Uzkimyosanoat JSC 2025 Annual Report, Argus June 2026

Intermediates and Raw Material Value

Phosphate rock and sulfuric acid are core intermediates for phosphate fertilizers. China's Hubei phosphate rock prices remain firm, while Uzbekistan's local sulfuric acid capacity is limited; the cost of imported sulfur for acid production is transmitted to end-user phosphate fertilizer prices.

China Phosphate Rock 28% Mine-Mouth Price	**≈980 RMB/tonne**
Sulfur CIF Uzbekistan (Est.)	**140-160 USD/tonne**
Sulfuric Acid Local Ex-Works Price	**≈85 USD/tonne**

Source: Longzhong Information June 2026, Argus Sulphur June 2026

Trade and Macro Indicators

Uzbekistan's GDP growth rate in 2025 was approximately 5.5%, with agriculture accounting for about 24% of GDP. Bilateral trade between China and Uzbekistan exceeded USD 12 billion, with agrochemical products benefiting from tariff preferences and railway intermodal transport subsidies.

GDP Growth Rate (2025)	**5.5%**
Agriculture Share of GDP	**≈24%**
USD/UZS Exchange Rate (2026.06)	**≈12,850**
China-Uzbekistan Bilateral Trade Volume	**≈USD 12.2 billion**

Source: World Bank Spring 2026 Update, Central Bank of Uzbekistan June 2026

Risks and Opportunity Windows

Geopolitical disruptions may affect the stability of Russian fertilizer supply, creating a substitution window for Chinese enterprises. The Uzbek government has introduced fertilizer plant modernization subsidies and China-Uzbekistan railway freight rate discounts, presenting significant opportunities for localized production and joint venture plant construction.

Russian Fertilizer Export Policy Risk	⚠ Quota Volatility
China-Uzbekistan Railway Fertilizer Freight Discount	↓10%-15%

Uzbek Domestic Fertilizer Plant JV Opportunities	**3 planned projects**

Source: Ministry of Investment and Foreign Trade of Uzbekistan May 2026 Announcement, CRU Central Asia Fertilizer Special Report June 2026

▯ Data Sources Summary

- ▯ Argus Media — Fertilizer Market Weekly / FSU Fertilizer / Sulphur (June 2026)
- ▯ Longzhong Information — China Phosphate Fertilizer Weekly, Sulfur Price Monitor (June 2026)
- ▯ SunSirs — Phosphate Rock and Chemical Raw Material Price Alerts (July 1, 2026)
- ▯ UN Comtrade / State Customs Committee of Uzbekistan — 2025 Annual Trade Data
- ▯ State Statistics Committee / Ministry of Agriculture of Uzbekistan — Fertilizer Supply, Demand and Production (2025-2026)
- ▯ World Bank — Uzbekistan Macroeconomic Update (Spring 2026)
- ▯ Central Bank of Uzbekistan — Exchange Rate and Monetary Policy Report (June 2026)
- ▯ CRU Group — Central Asia Fertilizer Special Research (June 2026)