Uzbekistan Coffee Overseas Market Analysis Report

Target Country: Uzbekistan | Category: Coffee | Report Updated: July 1, 2026

Uzbekistan Coffee Key Conclusions

Uzbekistan's coffee market relies entirely on imports, with import value of approximately USD 32 million in 2025 and an annual growth rate of 12%-15%. Instant coffee accounts for 65% market share, while roasted coffee consumption is growing rapidly in major cities such as Tashkent. China's share of coffee exports to Uzbekistan has risen to approximately 8%, maintaining strong growth momentum. Core risks center on exchange rate volatility, logistics costs, and Russian re-export competition. ⚠ Exchange rate risk

- 2025 total coffee import value: approx. **USD 32 million**, ▲12% (YoY vs 2024)
- Instant coffee market share: **65%**; roasted coffee share rises to **25%**
- China's coffee exports to Uzbekistan in 2025: approx. **USD 2.56 million**, ▲18%
- Per capita coffee consumption: approx. **0.35 kg/year**, far below European levels, with significant growth potential

Source: ITC Trade Map 2025 trade data; Uzbekistan State Statistics Committee 2025 Annual Report; ICO Market Report June 2026

Supply and Demand Fundamentals

Uzbekistan has no domestic coffee cultivation, with supply 100% reliant on imports. Coffee import volume in 2025 was approximately 10,800 tons, with domestic consumption of about 10,500 tons and inventory turnover of approximately 300 tons. Consumption is concentrated in Tashkent (approx. 45%), Samarkand, and other large cities, with the young urban population as the primary consumer base.

Indicator	2023	2024	2025 Est.
Import Volume (10k tons)	0.82	0.96	1.08
Domestic Consumption (10k tons)	0.80	0.94	1.05
Import Value (USD million)	25.0	28.6	32.0
Per Capita Consumption (kg/year)	0.28	0.32	0.35

Source: ITC Trade Map; Uzbekistan State Statistics Committee foreign trade data; industry estimates (July 2026 based on trend projections)

China Market Overview

China's coffee market was valued at approximately RMB 230 billion in 2025, with Yunnan coffee production reaching about 112,000 tons. China's coffee exports continue to grow, totaling approximately USD 380 million in 2025, of which exports to the Central Asia region grew by approximately 20%. The ex-factory price of Yunnan coffee beans was approximately RMB 28-32/kg in June 2026, slightly down from the beginning of the year.

- 2025 China coffee market size: approx. **RMB 230 billion**, ▲9%
- Yunnan coffee 2025/2026 harvest output: approx. **112,000 tons**
- China coffee export total 2025: approx. **USD 380 million**, Central Asia exports ▲20%

- Yunnan Arabica bean ex-factory price June 2026: **RMB 28-32/kg**

Source: China General Administration of Customs 2025 import-export statistics; Yunnan Coffee Industry Association June 2026 Report; China Coffee Industry Development Report 2025 Edition

Uzbekistan Market Overview

Coffee retail prices in Uzbekistan are driven by import costs. In June 2026, the retail price of instant coffee (200g pack) in Tashkent supermarkets was approximately 45,000-65,000 UZS (approx. USD 3.5-5.1). Main import sources are Russia (approx. 35%), Turkey (approx. 20%), Italy (approx. 15%), and China (approx. 8%). The rise of urban café culture is driving consumption upgrading. ▯ Consumption upgrading

- Instant coffee (200g) retail price: **45,000-65,000 UZS** (approx. USD 3.5-5.1)
- Import sources: Russia **35%**, Turkey **20%**, Italy **15%**, China **8%**
- Tashkent coffee consumption share of national total: approx. **45%**
- Number of cafés in Tashkent 2025: over **350**, annual growth approx. 15%

Source: Uzbekistan State Statistics Committee; ITC Trade Map bilateral trade data; Tashkent city business registration data (2025)

Product Segment Structure

Uzbekistan's coffee imports are dominated by instant coffee. In 2025, instant coffee (HS 210111/210112) imports were approximately USD 20.8 million, accounting for 65%; roasted coffee beans/powder (HS 090121/090122) were approximately USD 8 million, accounting for 25%; and RTD coffee and coffee extracts were approximately USD 3.2 million, accounting for 10%. Roasted coffee has the fastest growth rate, at approximately 18% year-on-year.

Product Segment	2025 Import Value (USD 10k)	Share	YoY Growth
Instant Coffee	2,080	65%	▲10%
Roasted Coffee Beans/Powder	800	25%	▲18%
RTD Coffee / Extracts	320	10%	▲14%

Source: ITC Trade Map HS code classification statistics (2025); Uzbekistan Customs Committee classification data

Core Product Supply and Demand

Instant coffee is the core finished product in the Uzbekistan market, with consumption of approximately 6,800 tons in 2025, basically balanced in supply and demand but high-end products depend on imports. Roasted coffee consumption is approximately 2,600 tons, with about 15 small local roasting plants and limited capacity; approximately 70% of roasted coffee still depends on imports. The RTD coffee market is in its early stage.

- Instant coffee annual consumption: approx. **6,800 tons**, 100% import-dependent
- Roasted coffee annual consumption: approx. **2,600 tons**, local roasting accounts for approx. 30%
- Number of local roasting plants: approx. **15** (concentrated in Tashkent)
- RTD coffee market size: approx. **USD 1.8 million**, in a rapid growth phase

Source: Uzbekistan Food Industry Association 2025 Report; industry interview data; ITC Trade Map import volume estimates

Intermediate Goods and Raw Material Values

The core intermediate product for coffee is green coffee beans. The ICO composite price index was approximately 185 US cents/lb in June 2026, down about 8% year-on-year. The ex-factory price of Yunnan Arabica green beans in China is approximately RMB 28-32/kg. The CIF price of imported green beans in Uzbekistan (including logistics) is approximately USD 4.2-5.0/kg, with value added after roasting increasing by approximately 60%-80%.

Product	Price Range	Unit	Trend
ICO Composite Price Index	185	US cents/lb	▼8% (YoY)
Yunnan Arabica Green Beans	28-32	RMB/kg	→ Stable
Uzbekistan CIF Green Beans	4.2-5.0	USD/kg	▼5% (MoM)

Source: ICO June 2026 Price Report; Yunnan Coffee Exchange Center June 2026 quotes; logistics industry estimates

Trade and Macroeconomic Indicators

Uzbekistan's GDP growth rate was approximately 5.5% in 2025, with coffee-related import tariffs of 5%-10%. China-Uzbekistan bilateral trade volume was approximately USD 11 billion in 2025, with coffee being a small but rapidly growing category. The UZS/USD exchange rate was approximately 12,800:1 in June 2026, relatively stable. The government encourages food processing investment and offers tax incentives in special economic zones.

- Uzbekistan 2025 GDP growth rate: **5.5%** (World Bank data)
- Coffee import tariff: **5%-10%** (depending on processing degree)
- China-Uzbekistan bilateral trade 2025: approx. **USD 11 billion**
- UZS/USD exchange rate (June 2026): approx. **12,800:1**
- Food processing foreign-invested enterprises can enjoy **3-7 years** of tax relief

Source: World Bank Uzbekistan Country Report 2025; Uzbekistan Ministry of Investment and Foreign Trade; China General Administration of Customs

Risks and Opportunity Windows

Key risks include UZS exchange rate fluctuations affecting import costs, Russian re-export competition squeezing market share, and seasonal capacity constraints on Central Asian logistics corridors. Opportunity windows include: the accelerating formation of coffee consumption habits among the young population, insufficient local roasting capacity creating import substitution space, China-Uzbekistan Belt and Road cooperation reducing trade barriers, and the clear cost-performance advantage of Chinese instant coffee. ⚠ Exchange rate & logistics risks

- **Risk:** A 10% depreciation of UZS against USD would push up imported coffee retail prices by approx. 6%-8%
- **Risk:** Russian coffee re-exports account for 35% of the Uzbekistan market, intense price competition
- **Opportunity:** Uzbekistan coffee consumption growing at 12%+ annually, market continues to expand
- **Opportunity:** China's coffee exports to Central Asia benefit from Belt and Road tariff preferences and improved logistics lead times

Source: Central Bank of Uzbekistan exchange rate data; CAREC Logistics Report 2025; MOFCOM Belt and Road trade facilitation assessment

Key Data Sources Summary

ITC Trade Map — Uzbekistan coffee import classification data (HS 0901/2101), 2025

Uzbekistan State Statistics Committee — Foreign Trade Statistics Annual Report, 2025

China General Administration of Customs — Coffee Import & Export Monthly Statistics, full year 2025 and Jan-May 2026

International Coffee Organization (ICO) — Composite Price Index and Market Report, June 2026

World Bank — Uzbekistan Country Economic Data, 2025

Yunnan Coffee Industry Association — Yunnan Coffee Industry Report, June 2026

Uzbekistan Ministry of Investment and Foreign Trade — Foreign Investment Policy Compilation, 2025

Central Asia Regional Economic Cooperation (CAREC) — Central Asia Logistics and Trade Facilitation Report, 2025