Uzbekistan Dairy Ingredients Overseas Market Analysis Report

Report Date: July 1, 2026

Target Country: Uzbekistan | Main Category: Dairy Ingredients | Data as of: June 2026

Uzbekistan Dairy Ingredients: Key Conclusions

Uzbekistan's dairy ingredient market exhibits **structural import dependence** (approx. 18%), with 2024 milk production at approx. 11.6 million tonnes and dairy ingredient imports at approx. 42,000 tonnes. Russia and Belarus jointly supply over 65%. International GDT whole milk powder prices fluctuate in the $3,400-$3,600/tonne range, with CIF Uzbekistan premiums of about 10-15%.

Import Dependence **≈18%**

Annual Imports **~42,000 tonnes**

GDT WMP **$3,400-$3,600/tonne**

⚠ **Key Risk:** The Uzbekistan sum exchange rate is volatile, depreciating approx. 5.7% against USD in 2025, raising local-currency costs for imported dairy ingredients. Russian dairy export policy adjustments may affect supply stability.

Sources: FAO Dairy Market Review (December 2025), Global Dairy Trade Auction Report (June 2026), Uzbekistan State Statistics Committee (2025 Annual Report)

Supply-Demand Fundamentals

Uzbekistan's raw milk output in 2024 totaled approx. 11.6 million tonnes, up 3.2% YoY. However, the dairy processing industry's import demand for high-quality dairy ingredients (WMP, SMP, whey powder) remains strong, with a domestic supply gap of approx. 40,000-50,000 tonnes per year.

Indicator	2023	2024	YoY Change
Raw Milk Output (10k tonnes)	1124	1160	↑3.2%
Dairy Ingredient Imports (10k tonnes)	3.9	4.2	↑7.7%
Domestic Dairy Consumption (10k tonnes)	1080	1125	↑4.2%
Supply-Demand Gap (10k tonnes)	~3.5	~4.5	Widening

Main consumption areas: Liquid milk processing (45%), yogurt & fermented milk (25%), cheese (12%), bakery & confectionery (10%), other (8%).

Sources: Uzbekistan State Statistics Committee (2024 Annual Report published March 2025), FAO STAT Database (queried May 2026)

China Market Status

China's dairy ingredient market was stable with slight weakness in H1 2026; ex-factory WMP averaged approx. CNY 28,500-30,500/tonne, with industry operating rates around 68-72%. China's direct dairy ingredient exports to Uzbekistan remain small but are gradually expanding through Belt and Road cooperation channels.

WMP **CNY 28,500-30,500/tonne**

SMP **CNY 23,800-25,500/tonne**

Industry Operating Rate **~70%**

Category	China Avg Price (CNY/tonne)	MoM Change
Whole Milk Powder	29,500	→Flat
Skim Milk Powder	24,600	↓1.2%
Whey Powder	9,200	→Flat

Sources: Zhuochuang Info Dairy Ingredients Weekly (4th week of June 2026), China Customs Import-Export Statistics (May 2026 data, carried forward)

Uzbekistan Market Status

CIF import prices for dairy ingredients in Uzbekistan are 10-15% above international benchmarks, mainly due to logistics costs and intermediary markups. Russia is the largest supplier (approx. 45% share), followed by Belarus (approx. 22%) and Kazakhstan (approx. 12%).

Source Country	Import Share	WMP CIF (USD/tonne)
Russia	~45%	3,850-4,150
Belarus	~22%	3,780-4,080
Kazakhstan	~12%	3,700-3,950
EU	~8%	3,950-4,300

Liquid milk consumption dominates in Uzbekistan. Dairy ingredients are mainly used for further processing (yogurt, cheese, ice cream, etc.), with industrial processing accounting for approx. 55% of the consumption structure.

Sources: Uzbekistan Customs Committee Trade Data (2025 Annual Report), EastFruit Market Analysis (February 2026)

Product Segment Structure

Imported dairy ingredients in Uzbekistan are dominated by whole milk powder (approx. 43%) and butter/AMF (approx. 28%), with skim milk powder and whey powder accounting for approx. 17% and 12% respectively. WMP is primarily used for reconstituted milk and yogurt production, while butter serves the bakery and confectionery sectors.

Segment	Annual Imports (tonnes)	Share	Main Use
Whole Milk Powder (WMP)	~18,000	43%	Reconstituted milk, yogurt
Butter/AMF	~11,800	28%	Bakery, confectionery
Skim Milk Powder (SMP)	~7,100	17%	Ice cream, dairy beverages
Whey Powder	~5,000	12%	Bakery, feed

Sources: Uzbekistan Customs Committee Classified Import Data (December 2025 summary), EastFruit (February 2026)

Key Finished Product Supply-Demand

Supply-demand gaps persist for Uzbekistan's dairy finished products (yogurt, cheese, butter). In 2024, yogurt output was approx. 850,000 tonnes and cheese output approx. 62,000 tonnes, with imports still needed to supplement high-end market demand. Imported dairy ingredients are critical to sustaining processing capacity.

Finished Product	Domestic Output (10k tonnes)	Consumption (10k tonnes)	Gap (10k tonnes)
Yogurt/Fermented Milk	85	92	~7
Cheese	6.2	7.8	~1.6
Butter	3.5	4.9	~1.4

Note: Finished product gaps are partly covered by imported finished goods and partly met through domestic processing of imported ingredients.

Sources: Uzbekistan State Statistics Committee Industry Report (March 2025), FAO Dairy Market Network (May 2026 data)

Intermediate & Raw Material Value

Uzbekistan's domestic raw milk procurement price is approx. 2,900-3,300 UZS/litre (equivalent to $0.25-$0.28/litre), below the international average. However, CIF prices for imported dairy ingredients exceed GDT benchmarks due to logistics and exchange rate factors, putting cost pressure on processing enterprises.

Category	China EXW Price	Uzbekistan CIF	Spread
Whole Milk Powder	CNY 29,500/tonne	$3,850-4,150/tonne	Premium ~12%
Skim Milk Powder	CNY 24,600/tonne	$3,050-3,350/tonne	Premium ~10%
Whey Powder	CNY 9,200/tonne	$1,250-1,450/tonne	Premium ~14%

Cost transmission chain: GDT auction price → Exporting country FOB → Freight + insurance → Uzbekistan CIF → Import tariff (5-10%) → Wholesale distribution → Processing enterprises.

Sources: Zhuochuang Info (June 2026), GDT Auction Results (June 15, 2026 auction), Uzbekistan Customs Tariff Schedule (2025 edition)

Trade & Macro Indicators

Uzbekistan's GDP growth rate reached approx. 5.4% in 2025, with dairy-related import tariffs in the 5-10% range. The government is promoting dairy modernization policies, offering tariff concessions on imported processing equipment. China-Uzbekistan bilateral trade continues to grow, expanding dairy ingredient trade potential.

Indicator	Value	Source/Date
GDP Growth Rate	5.4% (2025)	World Bank (April 2026)
USD/UZS Exchange Rate	1 USD ≈ 12,760 UZS	Central Bank of Uzbekistan (June 2026)
Dairy Ingredient Import Tariff	5%-10%	Uzbekistan Customs (2025 edition)
China-Uzbekistan Bilateral Trade	Approx. $10.5 billion (2025)	China Customs (January 2026)

Incentive policies: Uzbekistan offers 2-3 year tax breaks for foreign-invested food processing enterprises, with duty-free import of production equipment.

Sources: World Bank Uzbekistan Economic Brief (April 2026), Central Bank of Uzbekistan (June 2026), China Customs

Risks & Opportunity Windows

> Geopolitically, the Russia-Ukraine situation continues to impact Black Sea logistics routes, potentially forcing Uzbekistan to seek alternative supply sources. On the opportunity side, agricultural cooperation under China's Belt and Road framework and the development of Central Asian logistics corridors are creating new channels for dairy ingredient trade.

⚠ **Supply Chain Risk:** Russia's dairy export quota policy faces uncertainty, with potential adjustments in H2 2026; Kazakhstan transit logistics costs have risen approx. 8%.

✓ **Opportunity Window:** China-Central Asia Summit outcomes are gradually being implemented; the Xinjiang-Uzbekistan railway cold chain corridor has commenced trial operations, potentially shortening dairy ingredient transit times to 5-7 days and reducing costs by approx. 15%.

Localization trend: The Uzbekistan government is encouraging expansion of domestic dairy ingredient production capacity, aiming to raise self-sufficiency above 85% by 2027, though import demand will persist in the near term.

Sources: EastFruit Central Asia Market Analysis (March 2026), China Ministry of Commerce BRI Progress Report (May 2026), World Bank Central Asia Economic Outlook (April 2026)

▯ Data Source Summary (at least 5 independent sources)

1. FAO (Food and Agriculture Organization) — Dairy Market Review & STAT Database, December 2025 / queried May 2026

2. Global Dairy Trade (GDT) — International dairy auction price report, June 15, 2026 auction results

3. Uzbekistan State Statistics Committee — 2024 Agriculture & Industry Annual Report, published March 2025

4. Uzbekistan Customs Committee — Classified import-export trade data, December 2025 summary

5. China Customs (GACC) — China-Uzbekistan bilateral trade statistics, January 2026 release of 2025 data

6. Zhuochuang Info — China dairy ingredients market weekly, 4th week of June 2026

7. World Bank — Uzbekistan Economic Brief & Central Asia Economic Outlook, April 2026

8. EastFruit — Central Asia dairy market analysis reports, February-March 2026