Uzbekistan Livestock Products Overseas Market Analysis Report

Target Country: Uzbekistan | Main Category: Livestock Products | Report Date: July 2, 2026

Key Conclusions on Uzbekistan Livestock Products

Uzbekistan's livestock industry in H1 2026 shows an overall pattern of "rising volume and prices," with meat production expected to reach 2.75 million tons. Feed self-sufficiency rate is below 40%, feed additive import dependency exceeds 60% , and China firmly holds the position as the top supply source. Mutton prices rose approximately 12% year-on-year, while beef prices increased moderately. Bilateral trade in livestock products between China and Uzbekistan exceeded USD 160 million in the first half, with feed additives and veterinary drugs serving as core growth engines.

- Estimated total meat production in H1 2026: **2.75 million tons**, +3.8% YoY
- Feed additive import dependency: **62%**, China's share approximately **45%**
- Average retail mutton price YoY increase: ▲12.3% (Tashkent wholesale market)
- China-Uzbekistan livestock products trade value H1: approximately **USD 162 million**, +14.5% YoY

Source: Uzbekistan State Statistics Committee (June 2026 Briefing); General Administration of Customs of China (January-May 2026 Statistics)

Supply and Demand Fundamentals

Overall supply and demand in Uzbekistan's livestock sector remains tight. Domestic meat consumption demand continues to rise with population growth and urbanization, while the self-sufficiency rate of feed ingredients (corn, soybean meal) is only about 35%-40%, requiring substantial imports to supplement. Meat imports in H1 2026 reached approximately 85,000 tons, primarily from Kazakhstan and Belarus.

Indicator	2025	2026 H1 Estimate	YoY Change
Total Meat Output (10,000 tons)	265	275 (Full-year estimate)	+3.8%
Milk Output (10,000 tons)	1150	1210 (Full-year estimate)	+5.2%
Meat Import Volume (10,000 tons)	15.2	8.5 (H1)	+6.1%
Feed Corn Self-Sufficiency Rate	37%	36% (continuing)	-1pp

Source: Uzbekistan State Statistics Committee (June 2026); FAO Statistical Database (Updated Q1 2026)

China Market Overview

China, as the world's largest feed additive producer, saw steady growth in exports of livestock-related products to Uzbekistan in H1 2026. Exports of lysine, methionine, and vitamin additives increased significantly year-on-year. Domestic feed ingredient prices remained relatively stable, providing a stable cost base for exports.

- China lysine (98.5%) average ex-factory price: **CNY 9,800/ton** (June 2026, Sublime China Information)
- China methionine (solid) average price: **CNY 21,500/ton**, slight MoM decrease of 0.8%

- Feed additive exports to Uzbekistan H1: approximately **USD 72 million**, +18.3% YoY
- China Vitamin A (500,000 IU) export quotation: **CNY 85-92/kg**

Source: Sublime China Information (June 30, 2026); General Administration of Customs of China (January-May 2026 Export Statistics)

Uzbekistan Market Overview

Local livestock product prices in Uzbekistan generally rose in H1 2026. Mutton prices at Tashkent wholesale market increased over 12% year-on-year, primarily driven by rising feed costs and slowing domestic herd growth. Imported meat accounts for about 6%-7%, with Kazakhstan being the largest meat supplier. In the feed additive market, the share of Chinese products continues to expand.

Category	Local Price (UZS/kg)	Equivalent USD/kg	YoY Change
Beef (boneless)	78,000-85,000	5.9-6.4	+7.5%
Mutton (bone-in)	82,000-92,000	6.2-7.0	+12.3%
Milk (farm price)	9,500-11,000/L	0.72-0.83	+5.8%

Source: Uzbekistan Ministry of Agriculture Price Monitoring (June 2026); Tashkent Wholesale Market Public Quotations

Product Segmentation Structure

Beef and mutton dominate livestock product consumption in Uzbekistan, together accounting for approximately 75% of meat consumption. Milk and dairy products form the second largest consumption category. In the feed additive segment, amino acids (lysine, methionine) account for the highest share of imports, followed by vitamins and enzyme preparations.

Sub-Category	Consumption Share / Import Share	H1 2026 Trend
Beef	Approx. 45% (meat consumption)	Steady demand growth
Mutton	Approx. 30% (meat consumption)	Largest price increase
Milk & dairy products	Annual consumption approx. 12 million tons	Processing demand rising
Feed additives - Amino acids	Approx. 55% of additive imports	Lysine demand +20%

Source: Uzbekistan State Statistics Committee (Q1 2026 Report); Comprehensive Industry Survey Data

Core End-Product Supply and Demand

Meat, as the core end product, has a supply-demand gap of approximately 150,000-180,000 tons per year, which must be filled through imports. Beef production in H1 2026 was approximately 920,000 tons, and mutton production approximately 480,000 tons. Leather, as an important by-product, maintained stable export volumes, primarily to China and Turkey.

- Estimated beef production in H1 2026: **920,000 tons**, +3.2% YoY
- Estimated mutton production in H1 2026: **480,000 tons**, +2.8% YoY
- Annual meat supply-demand gap: approx. **160,000-180,000 tons**, filled by imports

- Leather exports H1: approx. **18,000 tons**, basically flat YoY

Source: Uzbekistan State Statistics Committee (June 2026 Briefing); FAO Livestock Statistics

Intermediate Goods and Raw Material Values

Feed ingredients and additives are the key intermediate goods connecting Chinese supply with Uzbekistan's demand. In H1 2026, the CIF quotation for Chinese lysine to Uzbekistan was approximately USD 1,350-1,480/ton, and soybean meal landed price approximately USD 460-500/ton. The cost transmission effect is significant, with rising feed prices directly pushing up end-market meat prices.

Intermediate / Raw Material	China Ex-Works Price	Uzbekistan CIF / Landed Price
Lysine (98.5%)	CNY 9,800/ton	USD 1,350-1,480/ton
Methionine (solid)	CNY 21,500/ton	USD 2,850-3,100/ton
Soybean meal (43% protein)	CNY 3,850/ton	USD 460-500/ton

Source: Sublime China Information (June 2026); Mysteel Feed Ingredient Weekly Report (4th Week of June 2026); Comprehensive Trader Quotations

Trade and Macroeconomic Indicators

Uzbekistan's GDP growth rate in 2026 is expected to remain within the 5.5%-6.0% range, with livestock accounting for approximately 45% of agricultural GDP. China-Uzbekistan bilateral trade continues to expand, with China firmly remaining Uzbekistan's largest trading partner. The Sum exchange rate depreciated slightly in H1 2026, having some impact on import costs.

- Uzbekistan 2026 GDP growth estimate: **5.8%** (World Bank)
- Livestock share of agricultural GDP: approx. **45%**
- USD to UZS exchange rate (June 2026): 1 USD ≈ **13,200 UZS**
- China-Uzbekistan bilateral trade volume 2025: approx. **USD 14.8 billion**, H1 2026 +9% YoY
- Uzbekistan's tariff reduction policy on imported equipment for livestock processing enterprises continues

Source: World Bank (Updated June 2026); Central Bank of Uzbekistan Exchange Rate Announcement; General Administration of Customs of China

Risks and Opportunity Windows

Risks : Continued weakening of the Sum exchange rate may increase imported feed costs; occasional Foot-and-Mouth Disease risks in Central Asia require attention; global feed ingredient price fluctuation transmission effects are evident. Opportunities: The Uzbek government's livestock modernization policy creates incremental markets for feed additives and veterinary drugs; deepening China-Uzbekistan agricultural cooperation under the Belt and Road Initiative framework; gaps in local feed additive production capacity provide Chinese enterprises with a window for alternative deployment.

- Exchange rate risk : The Sum depreciated cumulatively by approx. 3.5% in H1 2026, increasing import costs

- Disease risk : Foot-and-Mouth Disease cases reported in border oblasts of Kazakhstan in Q1 2026
- Policy opportunity: Uzbekistan's "2025-2030 Livestock Development Plan" with investment of approx. USD 800 million
- Bilateral cooperation: China-Uzbekistan Agricultural Cooperation Committee 2026 meeting added feed additive trade facilitation as an agenda item

Source: Uzbekistan Ministry of Agriculture Announcement (2026); World Organisation for Animal Health (WOAH) Disease Notification (Q1 2026); Ministry of Commerce of China

Data Sources Summary

Uzbekistan State Statistics Committee — Livestock production and trade data (June 2026 Briefing)

FAO Statistical Database — Livestock production and trade data (Updated Q1 2026)

Mysteel — Weekly feed ingredient price report (4th Week of June 2026)

Uzbekistan Ministry of Agriculture — Price monitoring and policy announcements (June 2026)

General Administration of Customs of China — China-Uzbekistan bilateral trade statistics (January-May 2026)

Sublime China Information — Feed additive and raw material prices (June 30, 2026)

World Bank — Uzbekistan macroeconomic data (Updated June 2026)

Central Bank of Uzbekistan — Exchange rate announcement (June 2026)