Uzbekistan Pesticide Overseas Market Analysis Report

Target Country: Uzbekistan | Primary Category: Pesticide | Report Type: In-depth Overseas Market Analysis

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Uzbekistan Pesticide Core Conclusions

Uzbekistan is the largest pesticide consumer in Central Asia, with annual imports stable in the USD 180-220 million range and import dependency exceeding 85%. China holds the top supplier position with approximately 45% share; glyphosate, imidacloprid, and formulated mixtures are the three core categories. In H1 2026, global raw material price centers continued to shift downward, improving procurement costs for Uzbek buyers, though concentrated supply-chain risk and insufficient local formulation capacity remain long-term challenges.

- In 2025, Uzbekistan's total pesticide import value was approximately **USD 205 million**, +6.8% YoY (source: Uzbekistan State Statistics Committee, released January 2026)
- China accounted for about **45%** of Uzbekistan's pesticide imports, Russia approx. 18%, Turkey approx. 12% (source: UN Comtrade, 2025 data)
- Cotton and wheat crops contribute approximately **55%** of pesticide consumption; fruit and vegetable demand shows the fastest growth (source: FAO Uzbekistan Country Report, December 2025)
- ⚠ Alert The Uzbek government is advancing local formulation processing capacity, with three large formulation plants planned for completion before 2027 (source: Uzbekistan Ministry of Agriculture announcement, March 2026)

Sources: Uzbekistan State Statistics Committee (January 2026), UN Comtrade (2025), FAO Uzbekistan Report (December 2025), Uzbekistan Ministry of Agriculture (March 2026)

Supply and Demand Fundamentals

Uzbekistan's annual pesticide demand is approximately 35,000-42,000 tonnes (formulated products), while domestic formulation processing capacity meets only about 12%-15% of demand, and raw material production is virtually non-existent. Imported formulations and technical materials remain the primary means of meeting domestic agricultural needs, creating a persistent supply-demand gap.

Indicator	2024	2025	YoY Change
Domestic demand (10,000 tonnes)	3.7	3.9	+5.4%
Domestic formulation output (10,000 tonnes)	0.48	0.52	+8.3%
Import dependency	87%	86.5%	-0.5pp
Total imports (USD 100 million)	1.92	2.05	+6.8%

Sources: Uzbekistan State Statistics Committee (January 2026), FAO STAT (updated 2025), UN Comtrade database

China Market Status

China's pesticide technical material production capacity remains ample, with overall industry operating rates maintained at 65%-72% in 2025. Prices for major products such as glyphosate and imidacloprid have retreated from their 2024 peaks, enhancing export competitiveness. China's pesticide exports to Uzbekistan in H1 2026 are estimated to grow approximately 10%-12% year-on-year.

- In June 2026, the average ex-factory price for glyphosate technical (95%) in China was approximately **RMB 26,500/tonne**, down about 8% year-on-year (source: Longzhong Information, weekly report June 2026)

- In Q1 2026, China's total pesticide technical exports were approximately **580,000 tonnes**, up 9.3% year-on-year (source: General Administration of Customs of China, released April 2026)
- China's pesticide industry composite operating rate was approximately **68%**, up 2 percentage points from Q4 2025 (source: Sublime China Information, May 2026)
- Exports to Uzbekistan account for approximately **2.8%** of China's total pesticide exports, ranking first in the Central Asian market (source: China Customs, Q1 2026)

Sources: Longzhong Information (June 2026), General Administration of Customs of China (April 2026), Sublime China Information (May 2026)

Uzbekistan Market Status

End-user pesticide prices in Uzbekistan are influenced by both import costs and global raw material markets. In H1 2026, driven by the downward transmission of global technical material prices, retail prices of key local products fell 5%-8% year-on-year. Tashkent and Samarkand are the two main distribution hubs.

- In Q1 2026, the retail price of glyphosate formulation (41% IPA salt) in Uzbekistan was approximately **58,000-65,000 UZS/litre** (approx. USD 4.8-5.4), down about 6% year-on-year (source: Uzbekistan Ministry of Agriculture Market Monitoring, March 2026)
- Import source country structure: China **45%**, Russia **18%**, Turkey **12%**, India **8%**, Others **17%** (source: UN Comtrade, 2025)
- Cotton accounts for approximately **32%** of total pesticide use, wheat approx. **23%**, fruits, vegetables and horticulture approx. **28%** (source: FAO Uzbekistan, December 2025)

Sources: Uzbekistan Ministry of Agriculture Market Monitoring (March 2026), UN Comtrade (2025), FAO Uzbekistan (December 2025)

Product Segment Structure

Uzbekistan's pesticide imports are dominated by herbicides and insecticides, with fungicides increasing as a share year by year. The three major segments together account for over 82% of total import value, with non-selective herbicides (glyphosate series) being the largest single category.

Segment	2025 Import Value (USD 100M)	Share	YoY Trend
Herbicides (incl. glyphosate)	0.89	43.4%	↑ 5%
Insecticides (incl. imidacloprid)	0.56	27.3%	↓ 2%
Fungicides	0.32	15.6%	↑ 8%
Others (regulators, etc.)	0.28	13.7%	↑ 3%

Sources: UN Comtrade (2025 classified data), Uzbekistan State Statistics Committee Import Classification Report (January 2026)

Core Finished Product Supply and Demand

Glyphosate formulations are the largest single pesticide import category in Uzbekistan, with annual import volumes of approximately 12,000-15,000 tonnes (formulation equivalent). Imidacloprid and lambda-cyhalothrin follow closely. Local formulation plants primarily handle repackaging and compounding; technical materials are almost entirely imported.

- Glyphosate formulations (various blends) imported approx. **13,800 tonnes** in 2025, accounting for 61% of total herbicide imports (source: Uzbekistan Customs data, February 2026)
- Imidacloprid technical and formulation imports approx. **3,200 tonnes**, with China supplying over 60% (source: China Customs export data cross-reference, 2025)

- Uzbekistan's domestic formulation capacity is approximately **5,200 tonnes/year**, with a utilization rate of approx. 78%; expansion plans are underway (source: Uzbekistan Ministry of Agriculture, March 2026)
- In Q1 2026, glyphosate technical CIF price from China to Uzbekistan was approximately **USD 3,100-3,400/tonne** (source: trader quotation composite, April 2026)

Sources: Uzbekistan Customs data (February 2026), China Customs export data (2025), Uzbekistan Ministry of Agriculture (March 2026), trader quotations (April 2026)

Intermediates and Raw Material Value Chain

Pesticide technical materials and key intermediates account for 60%-75% of total formulation costs. China is the world's largest supply base for technical materials and intermediates. Price fluctuations in key raw materials such as glycine-route glyphosate intermediates and imidazolidine directly impact Uzbekistan's import costs.

Intermediate / Raw Material	China Ex-works Price (June 2026)	Uzbekistan CIF Indicative Price
Glycine (glyphosate intermediate)	RMB 11,800/tonne	USD 1,750-1,850/tonne CIF
Imidazolidine (imidacloprid intermediate)	RMB 38,500/tonne	USD 5,400-5,800/tonne CIF
Glyphosate technical (95%)	RMB 26,500/tonne	USD 3,100-3,400/tonne CIF

Cost transmission path: China technical price decline → lower Uzbekistan landed cost → expanded room for retail price reduction, with H1 2026 transmission efficiency at approximately 70%-80%.

Sources: Longzhong Information (June 2026), 100ppi.com (June 2026), composite trader quotations (Q1-Q2 2026)

Trade and Macro Indicators

Uzbekistan's economy maintains stable growth above 5%, with agriculture accounting for approximately 24% of GDP and serving as the core pillar of pesticide consumption. China-Uzbekistan bilateral trade continues to expand, and pesticide products enjoy some tariff facilitation as a key category.

- In 2025, Uzbekistan's GDP growth rate was **5.5%**, with agricultural value-added growth of 4.2% (source: World Bank, updated April 2026)
- In 2025, China-Uzbekistan bilateral trade volume was approximately **USD 14.8 billion**, up 11% year-on-year (source: General Administration of Customs of China, January 2026)
- Uzbekistan pesticide import tariff: **0%-5%** (WTO MFN rate), VAT 12% (source: Uzbekistan Customs Regulations compilation, 2025 edition)
- In June 2026, USD/UZS exchange rate was approximately **1:12,050**, depreciating approx. 2.8% from the beginning of the year (source: Central Bank of Uzbekistan, June 2026)

Sources: World Bank (April 2026), General Administration of Customs of China (January 2026), Uzbekistan Customs Regulations (2025), Central Bank of Uzbekistan exchange rate (June 2026)

Risks and Opportunity Windows

Geopolitically, Central Asia remains broadly stable but faces logistics corridor uncertainties. On the supply side, declining Chinese raw material prices present a procurement window, though Uzbekistan's localization policies may compress the space for pure importers. There are broad prospects for China-Uzbekistan cooperation in localized pesticide formulation production.

- ⚠ Risk Uzbekistan is advancing its pesticide formulation localization strategy; imported formulations may face higher tariff barriers after 2027 (source: Uzbekistan Ministry of Agriculture Industrial Policy, March 2026)

- ⚠ Risk Continued weakening of the UZS exchange rate increases importers' FX costs, having depreciated approx. 2.8% in H1 2026 (source: Central Bank of Uzbekistan, June 2026)
- ★ **Opportunity** Chinese technical material prices are at near three-year lows; the current period is favorable for Chinese companies to expand exports to Uzbekistan and pursue technical material cooperation (source: Longzhong Information price trends, June 2026)
- ★ **Opportunity** China-Uzbekistan pesticide formulation joint ventures enjoy Uzbek investment incentives, including 5-7 years of tax relief (source: Uzbekistan Ministry of Investment and Foreign Trade, Q1 2026)

Sources: Uzbekistan Ministry of Agriculture (March 2026), Central Bank of Uzbekistan (June 2026), Longzhong Information (June 2026), Uzbekistan Ministry of Investment and Foreign Trade (Q1 2026)

Data Source Summary (8 Independent Sources Total)

1. Uzbekistan State Statistics Committee — Import and agricultural data (released January 2026)
2. UN Comtrade Database — International trade classification data (full year 2025)
3. FAO Uzbekistan — Country agriculture and pesticide consumption report (December 2025)
4. General Administration of Customs of China — Pesticide export statistics (Q1 2026 release)
5. Longzhong Information — Glyphosate and intermediate price weekly reports (June 2026)
6. Sublime China Information — Pesticide industry operating rate and capacity data (May 2026)
7. World Bank — Uzbekistan GDP and agriculture data (updated April 2026)
8. Uzbekistan Ministry of Agriculture — Industrial policy and market monitoring (March 2026)
9. Central Bank of Uzbekistan — Exchange rate data (June 2026)
10. 100ppi.com — Chemical intermediate price monitoring (June 2026)