Uzbekistan Agricultural Film Overseas Market Analysis Report

Target Country: Uzbekistan | Main Category: Agricultural Film | Report Update Date: July 2, 2026

Agricultural Film Market Analysis — Uzbekistan

Uzbekistan Agricultural Film Key Conclusions

Uzbekistan's agricultural film market has an annual demand of approximately **80,000–100,000 tons**, with import dependency exceeding **75%**; China is the largest supply source. In 2024–2025, supported by PE raw material costs, CIF prices remained in the range of **USD 1,200–1,500/ton**. Uzbekistan's agricultural modernization policy is driving structural growth in greenhouse film demand, while mulch film demand is stabilizing due to cotton planting area adjustments. Key risks center on exchange rate volatility, logistics corridor stability, and the pace of domestic capacity substitution.

Annual Demand: Approx. 80,000–100,000 tons (2024 est.)

Import Dependency: 75%–80% ▲High

China's Share: Approx. 55%–62% (of imports)

Price Range: CIF Uzbekistan USD 1,200–1,500/ton

Source: General Administration of Customs of China export statistics, State Statistics Committee of Uzbekistan, Zhuochuang Information agricultural film market monitoring (2024–2025 data; July 2026 report uses prior values)

Supply-Demand Fundamentals

Uzbekistan's agricultural film market has a significant supply-demand gap, with domestic production meeting only about 20%–25% of consumption. In 2024, domestic output was approximately 18,000–22,000 tons, imports were about 60,000–80,000 tons, and total consumption was about 80,000–100,000 tons. Agriculture is the absolute dominant consumer, with cotton planting (mulch film) and greenhouse vegetables (greenhouse film) together accounting for over 85%.

Indicator	2023	2024	YoY Change
Domestic Output (k tons)	16–20	18–22	+8%–10%
Imports (k tons)	55–75	60–80	+5%–7%
Total Consumption (k tons)	75–95	80–100	+4%–6%
Import Dependency	73%–78%	75%–80%	Slight ↑

Source: State Statistics Committee of Uzbekistan, UN Comtrade Database, industry estimates (July 2026 report uses 2024 annual data)

China Market Overview

China's agricultural film industry has ample capacity, with 2024 output at approximately 3.2 million tons and an operating rate of 62%–65%. LLDPE raw material prices fluctuated between **CNY 7,800–8,800/ton**, providing cost-side support for agricultural film ex-factory prices. Exports to Central Asia continue to grow, with Uzbekistan being one of the largest export destinations for Chinese agricultural film in the Central Asian region.

Annual Output: Approx. 3.2 million tons (2024)

Operating Rate: 62%–65% ▼Low

LLDPE Price CNY 7,800–8,800/ton (ZCI)

Exports to Uzbekistan Approx. 20,000–28,000 tons/year

Source: Zhuochuang Information agricultural film weekly report, Longzhong Information PE raw material price monitoring, General Administration of Customs of China export data (Q1 2025 data; July 2026 report uses same)

Uzbekistan Market Overview

Uzbekistan's agricultural film market is import-driven, with China, Russia, and Iran as the main source countries. In 2024, Chinese agricultural film exports to Uzbekistan accounted for **55%–62%** of Uzbekistan's total imports. There are approximately 8–12 domestic producers in Uzbekistan, mostly small-to-medium in scale, mainly producing ordinary mulch film, while high-end functional greenhouse film is almost entirely dependent on imports.

Main Sources China (58%), Russia (15%), Iran (10%), Others (17%)

Domestic Producers Approx. 8–12 (mostly SMEs)

Consumption Mix Mulch film 55%, Greenhouse 32%, Silage 8%, Others 5%

Source: Uzbekistan Customs statistics, Economic and Commercial Office of the Chinese Embassy in Uzbekistan (2025 data; July 2026 report uses prior values)

Product Segmentation

Uzbekistan's imported agricultural film can be segmented into three major categories: mulch film, greenhouse film, and silage film. Mulch film holds the largest share but growth is slowing; greenhouse film is growing significantly (approx. **10%–15% YoY**) driven by greenhouse expansion policies; silage film grows steadily alongside livestock sector development. Functional agricultural films (long-life film, light-conversion film, anti-fog film) represent high-value-added import categories.

Subcategory	Import Share	Price Range (USD/t)	Demand Trend
Mulch Film (Covering)	50%–55%	1,100–1,350	Stable
Greenhouse Film	28%–33%	1,400–1,800	▲Growth
Silage Film	6%–9%	1,300–1,550	Steady growth
Functional Agri-film	4%–7%	1,800–2,500	▲High growth

Source: China Customs HS code classification statistics, Uzbekistan importer surveys (2024–2025 data)

Core Finished Product Supply-Demand

Agricultural film, as a core finished product, faces a persistent supply-demand gap in Uzbekistan. In 2024, domestic output was about 20,000 tons and imports were about 70,000 tons, leaving a gap of approximately **50,000–60,000 tons** to be filled by imports. The greenhouse film supply-demand imbalance is particularly pronounced, with imported high-quality long-life greenhouse film commanding a 30%–50% premium over ordinary film.

Domestic Output Approx. 18,000–22,000 tons/year (2024)

Import Volume Approx. 60,000–80,000 tons/year

Supply Gap 50,000–60,000 tons (net imports)

GH Film Premium Imported high-quality greenhouse film premium 30%–50%

Source: Ministry of Agriculture of Uzbekistan, industry importers association data compilation (2025 data; July 2026 report uses prior values)

Intermediates & Raw Material Value

The core raw materials for agricultural film are LLDPE/LDPE (Linear Low-Density Polyethylene/Low-Density Polyethylene). In 2024–2025, LLDPE prices in Chinese production areas were **CNY 7,800–8,800/ton**, while CIF Uzbekistan indicative import prices were in the range of **USD 1,050–1,250/ton**. Crude oil price fluctuations pass through to agricultural film costs via the ethylene–polyethylene chain, with raw material costs accounting for approximately 65%–75% of total agricultural film cost.

Raw Material	China Prod. Area Price	Uzbekistan CIF Indicative	Cost Share
LLDPE	CNY 7,800–8,800/ton	USD 1,050–1,200/t	55%–65%
LDPE	CNY 8,500–9,500/ton	USD 1,150–1,300/t	10%–15%
Additive Masterbatch	CNY 12,000–18,000/ton	—	5%–8%

Source: Longzhong Information PE price monitoring, Zhuochuang Information agricultural film raw material analysis, Argus Media polymer market reports (Q1–Q2 2025 data; July 2026 report uses same)

Trade & Macro Indicators

Uzbekistan's economy maintains steady growth, with GDP growth of approximately **5.6%** in 2024, and agriculture accounting for approximately **27%** of GDP. Bilateral trade between China and Uzbekistan continues to expand, with China being Uzbekistan's largest trading partner. Uzbekistan is advancing its WTO accession process, with import tariffs trending downward; agricultural film import tariffs are approximately 5%–10%.

GDP Growth 5.6% (2024, World Bank)

Agriculture % of GDP Approx. 27%

Exchange Rate 1 USD ≈ 12,900–13,200 UZS

Agri-film Import Tariff 5%–10% (MFN rate)

Source: World Bank, IMF country reports, Central Bank of Uzbekistan, Ministry of Commerce of China Country Trade Guide (2024–2025 data)

Risk & Opportunity Window

Key risks include: ⚠ Exchange rate volatility — the Uzbek sum's continued mild depreciation against the USD pushes up import costs; ⚠ Logistics bottlenecks — Central Asian overland transport is occasionally disrupted by geopolitical factors. Opportunities: Uzbekistan's greenhouse agriculture expansion plan generates incremental demand for greenhouse film; domestic production of functional agricultural film is virtually non-existent, offering substantial scope for import substitution and technical cooperation; deepening China-Uzbekistan bilateral economic and trade cooperation provides policy dividends.

Risks Annual currency depreciation 6%–8%, overland logistics uncertainty

Opportunities Greenhouse expansion driving greenhouse film 10%+ annual growth, functional film import substitution

Policy Tailwinds China-Uzbekistan economic cooperation framework, WTO accession tariff reduction expectations

Source: Ministry of Agriculture of Uzbekistan planning documents, Ministry of Commerce of China, comprehensive industry analysis (2025–2026 trend assessment)

Data Sources Summary

① General Administration of Customs of China — Agri-film export statistics (HS code 39201090, etc.)

② Zhuochuang Information (ZCI) — Agri-film market weekly report & price monitoring

③ Longzhong Information (LZI) — PE raw material (LLDPE/LDPE) price data

④ State Statistics Committee of Uzbekistan — Agriculture & trade statistics

⑤ World Bank & IMF — Macroeconomic and country data

⑥ UN Comtrade Database — International trade flow data

⑦ Argus Media — Polymer and petrochemical market reports

⑧ Ministry of Commerce of China — Country Trade Guide (Uzbekistan)