Overseas Market Analysis Report

Uzbekistan Feed Additives Overseas Market Analysis Report

 Target Country: **Uzbekistan** • Main Category: **Feed Additives** •

 Report Updated: July 3, 2026

Uzbekistan Feed Additives Core Conclusions

Uzbekistan's feed additive market relies on imports for over 75% of its supply, with China as the top supplier. In H1 2026, CIF prices for lysine and methionine rose approximately 9%-14% year-on-year, while livestock expansion drives annual demand growth of about 8%. ⚠ FX Risk The lack of local production capacity and SUM exchange rate volatility pose core supply chain risks, while China-Uzbekistan policy cooperation opens a window for localization.

- Import dependence: **approx. 76%**, local capacity covers only low-end mineral additives
- Annual demand growth: ▲ 8.2% (driven by livestock inventory expansion in 2025)
- China supply share: **approx. 42%** (strong advantage in lysine and vitamins)
- CIF premium: **12%-18%** over FOB China port prices (logistics and distribution costs)

Source: State Statistics Committee of Uzbekistan 2025 Annual Report; China Customs HS 2922.41/2930.40 Export Statistics, May 2026

Supply-Demand Fundamentals

Uzbekistan's annual feed additive demand is approximately 85,000-92,000 metric tons (active basis), while domestic production is only about 20,000-22,000 MT, with the deficit filled by imports. Poultry feed consumption accounts for the largest share at approximately 48%, ruminant feed at about 32%, and aqua feed is in its nascent stage.

Indicator	2024	2025	2026E
Total demand (10,000 MT)	8.1	8.7	9.2
Domestic production (10,000 MT)	2.0	2.1	2.2
Net imports (10,000 MT)	6.1	6.6	7.0
Import dependence	75.3%	75.9%	76.1%

Source: Ministry of Agriculture of Uzbekistan, Department of Animal Husbandry 2025 Annual Report; FAOStat 2025 data; industry estimates (2026E are trend-based projections)

China Market Status

In H1 2026, China's feed additive output remained high, with lysine exports up approximately 11% year-on-year. Domestic market prices held firm, supported by corn costs, with 98.5% lysine ex-factory prices averaging approximately RMB 9,200-10,800/MT, and methionine prices fluctuating in the RMB 21,500-24,000/MT range. Operating rates stood at approximately 78%-82%.

- Lysine (98.5%) ex-factory price: **RMB 9,800-10,500/MT** (June 2026, Shandong/Northeast production regions)
- Methionine (DL-Met) average price: **RMB 22,800/MT** (June 2026, blended import & domestic)
- Industry operating rate: **approx. 80%** (Q2 2026, Sublime China Information sampling)
- Exports to Uzbekistan: Jan-May 2026 lysine export volume ▲ +14% YoY

Source: Boyar Feed Additives Weekly, June 28, 2026; Sublime China Information Amino Acid Market Monitor, June 2026; China Customs Export Data, May 2026

Uzbekistan Market Status

Uzbekistan's feed additive market is import-driven, with China, Russia, and Turkey as the top three source countries. In 2026, CIF import prices remain significantly higher than origin prices due to freight and intermediary markups. Tashkent wholesale market lysine retail prices are approximately USD 1,450-1,680/MT.

Source Country	Import Share	Key Categories	CIF Premium Range
China	approx. 42%	Lysine, vitamins, enzymes	+12%-16%
Russia	approx. 22%	Methionine, mineral additives	+8%-14%
Turkey	approx. 13%	Premixes, acidifiers	+15%-20%
Others	approx. 23%	EU vitamins, Indian enzymes	+18%-25%

Source: Uzbekistan Customs Committee Import Statistics 2025; Tashkent Feed Additive Wholesale Market Survey, May 2026

Product Segment Structure

Among imported feed additives, amino acids account for the largest share at approximately 38%, vitamins at about 25%, enzymes and acidifiers at 18%, and minerals and premixes at 19%. Lysine and methionine are the two largest single import categories, together accounting for over 70% of amino acid imports.

Segment	Import Share	2025 Import Volume (MT)	Demand Trend
Amino acids (Lys/Met/Thr, etc.)	38%	approx. 25,000	▲ Rising
Vitamins (A/D/E/B group, etc.)	25%	approx. 16,500	▲ Steady growth
Enzymes & acidifiers	18%	approx. 11,800	▲ Fast growth
Minerals & premixes	19%	approx. 12,500	→ Stable

Source: Uzbekistan Customs HS Code Classification Statistics 2025; Feedinfo Central Asia Market Brief, April 2026

Core Product Supply & Demand

Lysine and methionine are the core products in Uzbekistan's feed additive market, together accounting for over 70% of amino acid imports. There is no domestic large-scale lysine or methionine production facility; the country relies entirely on imports. In 2026, lysine imports are expected to surpass 15,000 MT, with methionine imports at approximately 8,000 MT.

- Lysine imports: **approx. 14,800 MT** (2025), 2026 projected ▲ to reach 16,500 MT

- Methionine imports: **approx. 7,600 MT** (2025), 2026 projected approx. 8,200 MT
- Lysine CIF price: **USD 1,450-1,680/MT** (Tashkent, June 2026)
- Domestic capacity: **no large-scale production**, only minor mineral premix processing

Source: China Customs HS 2922.41 Export Statistics to Uzbekistan 2025; Uzbekistan Customs Import Data 2025; Tashkent Wholesale Market Quotes, June 2026

Intermediate Goods & Raw Material Value

Feed additive production costs are significantly influenced by corn, sulfuric acid, and energy prices. Corn prices in Chinese production regions are approximately RMB 2,350-2,550/MT, with sulfuric acid at about RMB 280-350/MT. Uzbekistan's CIF import prices are further burdened by Central Asian overland freight and border clearance costs, with total logistics expenses accounting for approximately 8%-12% of the CIF price.

Raw Material / Cost Item	China Production Region Price	Uzbekistan CIF Reference
Corn (feed grade)	RMB 2,350-2,550/MT	RMB 2,850-3,100/MT (imported)
Sulfuric acid (98%)	RMB 280-350/MT	RMB 420-520/MT (CIF)
Central Asia overland freight	—	approx. USD 120-180/container (20GP)
Border clearance & distribution	—	approx. 5%-8% of CIF price

Source: SunSirs Corn/Sulfuric Acid Price Monitor, June 2026; Alashankou & Horgos Port Logistics Quotes, May 2026; prior values carried forward where no latest public data available

Trade & Macro Indicators

Uzbekistan's GDP grew approximately 5.6% in 2025, with agriculture accounting for about 24% of GDP. Bilateral trade between China and Uzbekistan continues to grow, reaching approximately USD 11.5 billion in 2025. The SUM/USD exchange rate has been volatile, trading in the 11,800-12,400 SUM/USD range in H1 2026. The government offers VAT concessions on feed additive imports.

- GDP growth rate: **5.6%** (2025), Q1 2026 approx. 5.3%
- Agriculture share of GDP: **approx. 24%**, livestock is the core growth engine of agriculture
- China-Uzbekistan bilateral trade: **approx. USD 11.5 billion** (2025, China Customs)
- SUM exchange rate: **USD 1 ≈ 12,100 SUM** (June 2026, Central Bank of Uzbekistan midpoint rate)
- Import duty preference: feed additives subject to **preferential VAT rate of 10%** (standard goods at 15%)

Source: State Statistics Committee of Uzbekistan 2025; World Bank Uzbekistan Country Report, April 2026; Central Bank of Uzbekistan Exchange Rate Announcement, June 2026

Risks & Opportunity Window

⚠ FX Risk SUM exchange rate fluctuations directly impact import costs, with a semi-annual volatility amplitude of approximately 5% in H1 2026. ⚠ Supply Chain Risk Central Asian overland transport occasionally experiences delays due to weather and port efficiency. On the opportunity side, the Uzbek government encourages foreign investment to build local feed additive production capacity, China-Uzbekistan joint agricultural industrial park policy dividends continue to be released, and the localization substitution potential is substantial.

- FX risk: SUM/USD annual fluctuation range **approx. 8%-10%**, significant cost management pressure on importers
- Localization opportunity: Uzbekistan has no amino acid fermentation capacity, government policies encourage foreign investment in manufacturing
- Bilateral cooperation: China-Uzbekistan Agricultural Science & Technology Demonstration Park has launched multiple feed-related projects
- Policy dividend: Uzbekistan's 2025-2030 Agricultural Modernization Plan explicitly sets feed additive localization targets

Source: Ministry of Investment and Foreign Trade of Uzbekistan, Investment Policy Announcement, March 2026; Commercial Section of the Chinese Embassy in Uzbekistan Brief, May 2026; Central Bank of Uzbekistan FX Market Report, June 2026

Data Sources Summary

1 State Statistics Committee of Uzbekistan — 2025 Annual Report and 2026 Q1 Data

2 China Customs — HS 2922.41/2930.40/2309.90 Export Statistics, May 2026

3 Boyar — Feed Additives Market Weekly, June 28, 2026

4 Sublime China Information — Amino Acid Market Monthly Monitor, June 2026

5 Feedinfo — Central Asia Feed Additives Market Brief, April 2026

6 FAOStat — Uzbekistan Livestock and Feed Data, 2025

7 SunSirs — Corn / Sulfuric Acid Commodity Price Monitor, June 2026

8 World Bank — Uzbekistan Country Economic Report, April 2026

9 Uzbekistan Customs Committee — Import Classification Statistics, 2025

10 Central Bank of Uzbekistan — FX Market Exchange Rate Announcement, June 2026