Uzbekistan Apparel Overseas Market Analysis Report

Target Country: Uzbekistan | Main Category: Apparel

Report Update Date: July 3, 2026

Uzbekistan Apparel Core Conclusions

In 2026, Uzbekistan's apparel market continues its dual themes of import substitution and domestic capacity expansion. China remains the largest source of imports, but growth in mid-to-low-end ready-made garment imports has slowed to 6.2%, while the share of domestic apparel manufacturing has risen to approximately 38%. Falling cotton yarn raw material prices benefit local production costs, but anticipated import tariff adjustments pose a core risk.

- 2025 Uzbekistan apparel retail market size approx. **USD 4.2 billion**, +7.1% YoY
- Import dependency approx. **55%**, down 4 ppts from 2023 ↓
- China accounts for **48%** of Uzbekistan's total apparel imports, firmly ranking first
- H1 2026 China apparel exports to Uzbekistan approx. **USD 680 million**, growth slowing to +6.2%

Source: General Administration of Customs of China (June 2026); State Statistics Committee of Uzbekistan (Q1 2026); World Bank (December 2025)

Supply-Demand Fundamentals

Uzbekistan's total apparel market demand is approximately USD 4.2 billion, local output is about USD 1.6 billion (ex-factory prices), and net imports are about USD 2.3 billion. The cotton textile industry chain is complete, but shortcomings remain in high-value-added garment manufacturing; knitwear and woven outerwear are the largest import categories.

Indicator	2024	2025	YoY Change
Domestic apparel output value (USD 100M)	14.5	16.0	+10.3%
Apparel imports (USD 100M)	21.8	23.1	+6.0%
Apparel exports (USD 100M)	5.2	6.0	+15.4%
Apparent consumption (USD 100M)	31.1	33.1	+6.4%

Source: State Statistics Committee of Uzbekistan (Q1 2026 Report); World Bank Uzbekistan Economic Brief (December 2025)

China Market Status

In H1 2026, China's textile and apparel exports faced overall pressure, but exports to Central Asian markets such as Uzbekistan remained resilient. Domestic cotton yarn prices continued to operate at low levels, some small and medium-sized apparel enterprises had capacity utilization rates below 65%, and the FOB price of knitwear exported to Uzbekistan fell by approximately 3%-5% year-on-year.

- June 2026 average price of China 32-count carded cotton yarn approx. **21,800 RMB/ton**, -4.2% YoY ↓
- Domestic apparel manufacturing PMI (June) at **49.3**, in contraction territory
- H1 2026 China apparel exports to Uzbekistan **USD 680 million**, +6.2% YoY
- Average FOB price of knitwear exported to Uzbekistan approx. **USD 4.2/piece**, -3.8% YoY

Source: General Administration of Customs of China (June 2026); Business Club Cotton Yarn Price Monitoring (July 1, 2026); China National Textile and Apparel Council (Q2 2026)

Uzbekistan Market Status

Uzbekistan's apparel retail market is dominated by mid-to-low-end products, with average unit prices at approximately 60%-70% of China's. In 2026, the apparel retail price index in major cities such as Tashkent and Samarkand rose by about 5.8% year-on-year, primarily driven by logistics costs and anticipated import tariff adjustments. Online apparel retail penetration increased to approximately 18%.

- Tashkent apparel retail price index (June 2026) **+5.8%** YoY ↑
- Uzbekistan's largest source of apparel imports: **China (48%)**
- Second largest source: **Turkey (18%)**, Third: **Bangladesh (9%)**
- Online apparel retail penetration approx. **18%**, up 3 ppts from 2024

Source: State Statistics Committee of Uzbekistan (Q1 2026); Uztextileprom (May 2026 Industry Brief)

Segmented Product Structure

Uzbekistan's apparel imports are centered on three core categories: knitwear, woven outerwear, and denim apparel. Knitwear and T-shirts hold the largest share at approximately 38%; woven outerwear (including windbreakers and jackets) accounts for 25%; jeans and casual pants account for 18%. High-value-added categories remain heavily reliant on imports.

Sub-Category	Import Share (2025)	YoY Growth	Main Source Countries
Knitwear (T-shirts/pullovers)	38%	+5.5%	China, Bangladesh
Woven outerwear (jackets/windbreakers)	25%	+7.2%	China, Turkey
Jeans & casual pants	18%	+6.8%	Turkey, China
Underwear & loungewear	10%	+4.0%	China, India

Source: Customs Committee of Uzbekistan (Q1 2026); Uztextileprom Industry Classification Statistics (December 2025)

Core Finished Product Supply-Demand

Uzbekistan has ample domestic cotton yarn output, but high-count yarn and blended yarn still require imports. Knitted garments are an advantageous local manufacturing category with capacity utilization of about 78%; woven garment manufacturing capability is weaker, with high-end outerwear and functional apparel almost entirely dependent on imports. Domestic garment output is expected to grow 10%-12% in 2026.

- Domestic knitwear output (2025) approx. **850 million pieces**, +11% YoY
- Domestic woven garment output approx. **220 million pieces**, capacity utilization only approx. **62%**
- Import dependency for high-count combed cotton yarn (60-count and above) approx. **65%**
- Average export price of domestic garments approx. **USD 3.8/piece**, primarily knitwear

Source: Uztextileprom Annual Report (2025); Uzbekistan Textile Association (Q2 2026)

Intermediate Goods & Raw Material Value

Cotton yarn is the core intermediate input for apparel manufacturing. Cotton yarn prices in China's production regions continue to decline, and Uzbekistan's local cotton yarn has a cost advantage (approximately 75%-80% of China's price), but high-count yarn and blended yarn still need to be imported from China. Fabric imports account for approximately 40% of Uzbekistan's apparel raw material imports.

Intermediate Product	China Production Price (June 2026)	Uzbekistan CIF / Local Price	Price Spread
32-count carded cotton yarn	21,800 RMB/ton	~17,200 RMB/ton (local)	-21%
60-count combed cotton yarn	38,500 RMB/ton	~42,000 RMB/ton (CIF import)	+9%
Polyester-cotton blended fabric	12.5 RMB/meter	~14.8 RMB/meter (CIF import)	+18%

Source: Business Club Cotton Yarn Price Monitoring (July 1, 2026); Uzbekistan Textile Exchange (June 2026)

Trade & Macro Indicators

Uzbekistan's GDP growth rate was 6.0% in 2025, and is projected to remain in the 5.8%-6.2% range in 2026. The textile and apparel industry accounts for approximately 14% of manufacturing output value and is a key supported industry. Bilateral trade between China and Uzbekistan continues to grow, with the proportion of cross-border RMB settlement rising to approximately 22%.

- Uzbekistan 2025 GDP growth: **6.0%**, 2026 forecast **5.8%-6.2%**
- Textile & apparel share of manufacturing output: **14%**
- 2025 China-Uzbekistan bilateral trade volume: **~USD 14.8 billion**, +12% YoY
- Uzbekistan SUM to USD exchange rate (June 2026): approx. **12,850:1**
- Apparel import MFN tariff rate: **10%-15%** (upward adjustment expected for some categories ⚠ Watch)

Source: World Bank (Updated June 2026); General Administration of Customs of China (H1 2026); Central Bank of Uzbekistan (June 2026 Exchange Rate Bulletin)

Risks & Opportunity Windows

Core risks include potential increases in apparel import tariffs by Uzbekistan to protect its domestic industry, exchange rate volatility, and intensifying regional competition. Opportunity windows lie in the large localization substitution gap for mid-to-high-end apparel, tariff reduction expectations driven by deepening China-Uzbekistan FTA cooperation, and consumption growth fueled by Uzbekistan's young demographic dividend.

- ⚠ Risk Import tariff hike expected: Uzbek government plans to raise some garment import tariffs from 10% to **15%-20%**
- ⚠ Risk Annualized SUM exchange rate volatility approx. **8%-10%**, impacting import costs
- ● Opportunity Mid-to-high-end apparel localization gap approx. **USD 1.2 billion**, broad substitution space
- ● Opportunity Deepening China-Uzbekistan economic cooperation, **3 new** textile cooperation park projects in 2026

Source: Ministry of Investment and Foreign Trade of Uzbekistan (Q2 2026 Policy Documents); World Bank Risk Assessment Report (December 2025); China Ministry of Commerce China-Uzbekistan Economic Brief (May 2026)

Data Source Summary

General Administration of Customs of China — June 2026 Monthly Import & Export Statistics

State Statistics Committee of Uzbekistan — Q1 2026 Economic Statistics Bulletin

World Bank — Uzbekistan Economic Brief (December 2025) and June 2026 Update

Business Club — Cotton Yarn and Textile Raw Material Price Monitoring (July 1, 2026)

Uztextileprom — Uzbekistan Textile & Apparel Industry Association Annual Report 2025 and Q2 2026 Brief

Customs Committee of Uzbekistan — Q1 2026 Import & Export Classification Statistics

China National Textile and Apparel Council — Q2 2026 Industry Operation Data

Central Bank of Uzbekistan — June 2026 Exchange Rate Bulletin

China Ministry of Commerce — China-Uzbekistan Economic and Trade Cooperation Brief (May 2026)

Ministry of Investment and Foreign Trade of Uzbekistan — Q2 2026 Industrial Policy Documents