# Uzbekistan Footwear Overseas Market Analysis Report

🇺🇿 Uzbekistan | 👟 Footwear | 📊 Market Analysis

Report Updated: July 4, 2026

## Uzbekistan Footwear Core Conclusions

Uzbekistan's footwear market is highly dependent on imports (import dependence approx. 72%), with China firmly established as the top supplier, accounting for around 62% of imports. Local production capacity is expanding rapidly, but mid-to-high-end products still rely on external supply.

- In 2024, Uzbekistan's footwear imports totaled approx. **USD 380 million**, up about 9% year-on-year
- China accounted for **62%** of Uzbekistan's total footwear imports, Turkiye 14%, and Russia 8%
- Natural rubber prices fluctuated between **13,500-15,800 CNY/ton** in Q1 2025, keeping cost-side pressure manageable
- Uzbekistan's GDP grew by approx. **5.5%** in 2024, with household consumption steadily increasing

⚠ Key Risk: The Uzbek Som (UZS) continues to depreciate moderately against the USD, with a depreciation of approx. 6% in 2024. Import cost fluctuations require ongoing attention.

Sources: State Statistics Committee of Uzbekistan, General Administration of Customs of China, SunSirs; data as of Q1 2025

## Supply & Demand Fundamentals

Uzbekistan's annual footwear consumption is approx. 180-200 million pairs, with local production around 50-55 million pairs. The gap is filled by imports. The consumption mix is dominated by casual shoes and leather shoes, with demand for sports shoes growing fastest.

| Indicator | 2023 | 2024E | Change |
|---|---|---|---|
| Local Production (10k pairs) | 4,800 | 5,200 | ↑8.3% |
| Import Volume (10k pairs) | 12,500 | 13,400 | ↑7.2% |
| Export Volume (10k pairs) | 1,100 | 1,250 | ↑13.6% |
| Apparent Consumption (10k pairs) | 16,200 | 17,350 | ↑7.1% |

Sources: State Statistics Committee of Uzbekistan, UN Comtrade; 2024 figures are estimated based on first 11 months

## China Market Overview

China's footwear exports remained resilient in 2024, with Central Asia leading growth rates. Domestic shoe material prices were stable, with ample supply of PVC and EVA. Capacity utilization remained high.

- China's total footwear exports in 2024 were approx. **USD 51 billion**, with exports to five Central Asian countries up about 15%
- Domestic shoe-grade PVC (SG-5) prices were approx. **5,800-6,300 CNY/ton** in Q1 2025, near three-year lows
- Average operating rate for Chinese shoe enterprises was about **78%**, with ample orders in Fujian and Guangdong production hubs
- China's footwear exports to Uzbekistan reached approx. **USD 235 million** in 2024, up about 11% year-on-year

Sources: General Administration of Customs of China, SCI99, SunSirs; data as of March 2025

## Uzbekistan Market Overview

Uzbekistan's footwear retail market is dominated by low-to-mid-priced products (unit price USD 8-25). Major cities like Tashkent and Samarkand exhibit clear consumption upgrades, driving demand for branded sports shoes and mid-range leather shoes.

- Local average retail price of footwear is approx. **USD 12-18/pair**, with imported products at a 30-50% premium
- Top import sources: China **62%**, Turkiye 14%, Russia 8%, Kazakhstan 5%
- Tashkent market accounts for about **38%** of national footwear consumption, the largest single-city market in Central Asia
- There are approx. **210** local footwear manufacturing enterprises, but fewer than 30 are above designated size

Sources: State Statistics Committee of Uzbekistan, local industry research reports; data as of December 2024

## Product Segmentation

Uzbekistan's footwear imports are dominated by rubber/plastic sole footwear (HS 6402) and leather upper footwear (HS 6403), together accounting for 68% of import volume. The sports shoe category is growing fastest, with an annual increase exceeding 18%.

| Subcategory | HS Code | Import Share | Demand Trend |
|---|---|---|---|
| Rubber/Plastic Sole Footwear | 6402 | 38% | ↑ Steady growth |
| Leather Upper Footwear | 6403 | 30% | → Stable |
| Textile Upper Footwear | 6404 | 22% | ↑ Rapid growth |
| Other Footwear | 6405 | 10% | → Stable |

Sources: UN Comtrade, Uzbekistan Customs data; data as of November 2024

## Core Finished Product Supply & Demand

Uzbekistan's local footwear enterprises primarily produce low-to-mid-range leather shoes and fabric shoes, with an annual output of about 52 million pairs. Mid-to-high-end sports shoes and branded leather shoes are almost entirely dependent on imports, with a supply-demand gap of approx. 120 million pairs per year.

- Local output: approx. **18 million pairs** of leather shoes, 24 million pairs of fabric shoes/slippers, and 10 million pairs of others
- Import share of sports shoes rose from 18% in 2020 to **27%** in 2024
- Average capacity utilization of local shoe enterprises is approx. **62%**, constrained by raw material imports and skilled worker shortages
- In 2024, Uzbekistan exported **12.5 million pairs** of footwear, mainly to Kazakhstan and Kyrgyzstan

Sources: Uzbekistan Leather & Footwear Association, local industry statistics; data as of December 2024

## Intermediate Goods & Raw Material Values

Core raw materials for footwear production include natural rubber, PVC/EVA granules, leather, and textile fabrics. Pricing in Chinese production hubs is competitive, with CIF prices in Uzbekistan 8-15% higher than in China.

| Raw Material | China Ex-works Price | Uzbekistan CIF (Est.) | Price Gap |
|---|---|---|---|
| Natural Rubber | 14,200 CNY/ton | 1,980 USD/ton | ~ +10% |
| PVC (SG-5) | 6,050 CNY/ton | 870 USD/ton | ~ +12% |
| EVA Granules | 12,800 CNY/ton | 1,850 USD/ton | ~ +14% |

Sources: SunSirs, SCI99; Uzbekistan CIF prices are estimates based on logistics costs; data as of March 2025

## Trade & Macroeconomic Indicators

Uzbekistan's macroeconomy is growing steadily, with GDP growth of approx. 5.5% in 2024 and per capita GDP surpassing USD 2,800. China-Uzbekistan bilateral trade continues to expand, and footwear as consumer goods benefits from consumption upgrades.

- Uzbekistan's GDP in 2024 was approx. **USD 108 billion**, with growth of 5.5% (World Bank)
- Per capita GDP was approx. **USD 2,820**, ranking third in Central Asia
- China-Uzbekistan bilateral trade in 2024 reached approx. **USD 14 billion**, with China as the largest trading partner
- USD/UZS exchange rate was approx. **1:12,850** (March 2025), with average annual depreciation of about 6%
- Import tariff on footwear in Uzbekistan is **5-10%**, with preferential rates for certain categories

Sources: World Bank, IMF, Central Bank of Uzbekistan, General Administration of Customs of China; data as of March 2025

## Risks & Opportunity Windows

Uzbekistan is advancing its local footwear revitalization plan, offering tax incentives to foreign-invested footwear enterprises. However, depreciation of the Som, high logistics costs, and a shortage of local skilled workers constitute major risks. Chinese footwear enterprises may consider an asset-light brand export model.

- Opportunity Uzbekistan launched a "Local Footwear Support Program" in 2025, offering a **5-year tax holiday** for joint-venture shoe enterprises
- Opportunity The China-Kyrgyzstan-Uzbekistan railway is advancing; future logistics lead time could shorten to **10-12 days** (currently about 18-25 days)
- Supply chain risk: cross-border land transport costs account for about **8-12%** of total value, with restrictions in winter

⚠ FX Risk: The Som depreciates 6-8% annually. It is recommended to use USD-denominated contracts or hedging instruments to manage exchange losses.

Sources: Ministry of Investment and Foreign Trade of Uzbekistan, local industry policy documents; data as of February 2025

## Data Sources Summary

• General Administration of Customs of China (2024 Footwear Export Statistics)

• State Statistics Committee of Uzbekistan (2024 Import & Production Data) • UN Comtrade Database (HS Code Detailed Trade Data)

- World Bank (Uzbekistan GDP & Macroeconomic Indicators)
- SunSirs (Natural Rubber, PVC, EVA Raw Material Prices)
- SCI99 (PVC & Plastic Raw Material Price Data)
- Uzbekistan Leather & Footwear Association (Local Production & Industry Survey)
- IMF International Monetary Fund (Exchange Rate & Economic Growth Forecasts)

Disclaimer: The data in this report is for reference only and does not constitute any investment advice. Markets carry risks, and decisions should be made with caution.