

Uzbekistan Home Textile Overseas Market Analysis Report

Report Updated: July 4, 2026

Target Country: Uzbekistan

Category: Home Textiles

Data Source: Multi-Agency Public Reports

Uzbekistan Home Textile Core Insights

Uzbekistan, Central Asia's largest cotton producer (annual output approx. **2.9 million tons**), is accelerating the localization of its home textile industry chain. Home textile finished products currently have an **import dependency of approx. 35%**, with China as the top source. Cotton yarn price transmission is significant. The 2025 home textile market size is approx. **USD 950 million**, with an expected 6%-8% growth in 2026. **Monitor FX volatility**

Market Size **~9.5 Billion USD (2025 Est.)**

Import Dependency **~35% ↓ Down 8 pct points from 2020**

China's Share **~48%** Ranks first among import sources

Source: State Statistics Committee of Uzbekistan, General Administration of Customs of China, ITC Trade Map; Q4 2025 consolidated data

Supply & Demand Fundamentals

Uzbekistan has abundant cotton resources but insufficient production capacity for home textile finished products, creating a supply-demand gap of approx. **USD 350 million**, primarily filled by imports. Bedding and towels have the fastest demand growth, with annual consumption increasing by approx. **7%-9%**.

Indicator	2023	2024	2025 (Est.)
Cotton Output (10K tons)	295	288	290
Home Textile Output (USD 100M)	5.2	5.6	6.0
Total Home Textile Consumption (USD 100M)	8.1	8.8	9.5
Net Imports (USD 100M)	2.9	3.2	3.5

Source: USDA FAS, Uzbekistan Textile Industry Association; Nov 2025 industry report

China Market Status

China's home textile exports to Uzbekistan maintain a growth trend, reaching approx. **USD 168 million** in 2025, a year-on-year increase of approx. 12%. Bedding sets and towels are the main export drivers, accounting for **62%** of total home textile exports to Uzbekistan.

Exports to Uzbekistan **~USD 168M ▲ YoY +12%**

Export Share by Category **Bedding Sets 38%, Towels 24%**

Domestic Cotton Yarn Price **~23,500 CNY/Ton** (32s Carded, 2025 Q4 Avg)

Source: General Administration of Customs of China, SunSirs, Longzhong Info; Dec 2025 data

Uzbekistan Market Status

Uzbekistan's home textile market is dominated by mid-to-low-end products, with approx. **260 local enterprises** concentrated in Tashkent and Fergana regions. Imported home textiles mainly come from China, Turkey, and Pakistan, accounting for **78%** of total imports.

Local Enterprises ~260 (Incl. SMEs)

Main Import Sources **China 48%, Turkey 18%, Pakistan 12%**

Consumption Structure **Household Retail 55%, Hotel/Institutional 30%, Others 15%**

Source: State Statistics Committee of Uzbekistan, ITC Trade Map; Q3 2025 data

Product Segmentation

Among home textile import categories, **bedding sets** account for the largest share (~36%), followed by towels (~24%), with curtains and decorative fabrics ranking third. The blankets/quilts category grows fastest, with import growth reaching **18%** in 2025.

Sub-Category	Import Share	2025 Growth	Avg. Price Trend
Bedding Sets	36%	+10%	Steady rise
Towels/Bath Towels	24%	+8%	Stable
Curtains/Decor Fabrics	18%	+12%	Slight increase
Blankets/Quilts	14%	+18%	↑ Significant

Source: China Customs HS Code Statistics, Uzbekistan Import Customs Data; Dec 2025 summary

Core Finished Product Supply & Demand

Bedding sets have the largest supply-demand gap, with local production meeting only around **55%** of demand. Local towel production capacity utilization is about **70%**, with high-end towels still heavily reliant on imports. Bedding set imports in 2025 are approx. **USD 126 million**.

Bedding Set Gap ~45% Relies on Imports **Gap narrowing yearly**

Towel Local Capacity Utilization ~70% High-end category <50%

Inventory Turnover **Importer Inventory ~45-60 days**

Source: Uzbekistan Textile Industry Association, China Chamber of Commerce for I/E of Textiles; Oct 2025

Intermediate Goods & Raw Materials

Cotton and cotton yarn are core raw materials for home textiles. Uzbek cotton yarn prices are approx. **8%-12%** lower than China's, offering a cost advantage. However, dyes and high-end accessories rely on imports, pushing up local finished product costs by approx. **5%-7%**.

UZ Cotton Yarn (32s) ~20,800 CNY/Ton (Tashkent Ex-factory)

CN Cotton Yarn (32s) ~23,500 CNY/Ton (East China Ex-factory)

Dye Import Dependency ~75% Mainly from China and India

Source: Longzhong Info, SunSirs, Uzbek Commodity Exchange; Q4 2025 data

Trade & Macro Indicators

Uzbekistan's GDP growth maintains **5.5%-6%**, with the textile industry accounting for approx. 4.2% of GDP. Import tariffs on home textiles are **5%-10%**, with some categories enjoying preferential rates. Bilateral trade between China and Uzbekistan is growing steadily.

GDP Growth **5.8%** (2025)

Exchange Rate (USD/UZS) **~12,650** UZS per USD

Home Textile Import Tariff **5%-10%** Bedding sets at 8%

Source: World Bank, Central Bank of Uzbekistan, WTO Tariff Database; Dec 2025 updated

Risk & Opportunity Windows

Opportunity: The Uzbek government promotes textile localization; Chinese companies can participate in joint venture factories. **Risk:** UZS exchange rate fluctuates significantly, with a depreciation of approx. **7%** in 2025, impacting importers' purchasing power. Overall geopolitical stability.

⚠ FX Risk **UZS Depreciates ~7% Annually**

☐ Localization Opportunity **Govt. Subsidies for Textile JVs**

☐ Bilateral Cooperation **China-Uzbekistan Textile MOU Continues Advancing**

Source: Ministry of Investment and Foreign Trade of Uzbekistan, Economic and Commercial Office of the Chinese Embassy in Uzbekistan; Nov 2025

Key Data Sources Summary (8 Sources)

- ▶ State Statistics Committee of Uzbekistan — Macroeconomic & Trade Data (2025 Q4)
- ▶ General Administration of Customs of China — HS Code Home Textile Export Data (Dec 2025)
- ▶ USDA FAS — Uzbekistan Cotton Production Report (Nov 2025)
- ▶ ITC Trade Map — Bilateral Trade Flow Data (2025 Q3)
- ▶ Longzhong Info / SunSirs — Cotton Yarn & Raw Material Prices (2025 Q4)
- ▶ World Bank — Uzbekistan GDP & Economic Indicators (Dec 2025)
- ▶ Uzbekistan Textile Industry Association — Industry Capacity & Consumption Data (Oct 2025)
- ▶ Economic and Commercial Office of the Chinese Embassy in Uzbekistan — Policy & Bilateral Cooperation Info (Nov 2025)

Disclaimer: The data in this report is for reference only and does not constitute any investment advice. Markets are risky; decisions should be made with caution. Some data relies on previous values; there are no latest public updates for July 2026.