Uzbekistan Glass Raw Materials and Products Overseas Market Analysis Report

Target Country: Uzbekistan

Main Category: Glass Raw Materials and Products

Report Update Date: July 4, 2026

Uzbekistan Glass Raw Materials and Products: Key Conclusions

Uzbekistan is the largest glass consumer market in Central Asia, with flat glass import dependency at approximately 38%-42% and soda ash almost entirely reliant on imports. China, as the largest supplier, dominates both raw materials and finished products. Strong construction sector growth drives demand expansion; domestic capacity is ramping up but the supply-demand gap is unlikely to close in the short term, and import demand remains elevated through 2026.

Flat Glass Import Dependency **~38%-42%**

Soda Ash Import Dependency **Nearly 100%**

China's Supply Share (Soda Ash) ~45%

Construction Sector Annual Growth ▲ ~6.5%-7.5%

Source: State Statistics Committee of Uzbekistan, General Administration of Customs of China; data as of Q4 2025, prior values carried forward as of July 2026

Supply-Demand Fundamentals

Uzbekistan's annual flat glass demand is approximately 24-26 million m², with domestic production at about 14-16 million m², leaving a supply gap of approximately 8-12 million m² to be filled by imports. The construction sector accounts for over 70% of consumption, while automotive and household appliances account for approximately 20%. Annual soda ash consumption is approximately 110-140 thousand tonnes, entirely dependent on imports.

Category	Annual Demand	Domestic Production	Import Volume	Import Dependency
Flat Glass	24-26 million m²	14-16 million m²	8-12 million m²	38%-42%
Soda Ash	110-140 kt	—	110-140 kt	Nearly 100%
High-Purity Quartz Sand	60-80 kt	20-30 kt	40-60 kt	55%-70%

Source: Uzbekistan Building Materials Industry Association, UN Comtrade; Q4 2025 data

Source: State Statistics Committee of Uzbekistan, UN Comtrade; report dated December 2025, prior values carried forward as of July 2026

China Market Overview

China's soda ash market remained at low levels overall in 2025, with light soda ash average prices at approximately RMB 1,550-1,800/tonne and dense soda ash at approximately RMB 1,650-2,000/tonne, with capacity utilization rate at 84%-88%. Flat glass output remained high, and exports to Central Asia continued growing. China's soda ash exports to Uzbekistan accounted for approximately 40%-50% of its total soda ash exports to Central Asia.

Light Soda Ash Ex-Factory Price RMB 1,550-1,800/t (East China)

Dense Soda Ash Delivered Price RMB 1,650-2,000/t (Float Glass Plants)

Soda Ash Capacity Utilization 84%-88%

Flat Glass Ex-Factory Price RMB 75-90/weight case (5mm Float)

Source: Longzhong Information, SCI99; soda ash and glass price monitoring reports, Q4 2025 data

Uzbekistan Market Overview

Uzbekistan's flat glass import CIF prices are approximately USD 8-12/m², and soda ash import CIF prices are approximately USD 250-320/tonne. Main source countries are China (~45%), Russia (~25%), and Turkey (~15%). Tashkent and Samarkand are the main consumption regions, with architectural glass accounting for over 70% of total consumption.

Flat Glass Import CIF USD 8-12/m²

Soda Ash Import CIF USD 250-320/t

Largest Source Country **China (~45%)**

Russia Share ~25% Turkey Share ~15%

Source: Customs Committee of Uzbekistan, UN Comtrade bilateral trade data; Q4 2025 data

Product Segmentation Structure

Glass raw materials and products imports can be segmented into: soda ash (sodium carbonate) accounting for approximately 35%-40% of import value, flat glass (float and rolled) at approximately 30%-35%, glassware and bottles/jars at approximately 15%-20%, and quartz sand and other raw materials at approximately 8%-12%. Soda ash imports grow at an annual rate of approximately 5%-8%, benefiting from the expansion of domestic glass production capacity.

Sub-Category	Import Value Share	Annual Growth Rate	Main Sources
Soda Ash (Sodium Carbonate)	35%-40%	5%-8%	China, Russia
Flat Glass	30%-35%	3%-6%	China, Turkey
Glassware / Bottles & Jars	15%-20%	4%-7%	China, Iran

Source: Customs classification statistics of Uzbekistan; Q4 2025 data

Source: Customs Committee of Uzbekistan commodity classification data; report dated December 2025

Core Finished Product Supply and Demand

Flat glass is the core category within Uzbekistan's glass products, with construction-grade float glass (4-6mm) accounting for over 60% of demand. Domestic producers such as Asl Oyna have a capacity of approximately 15 million m²/year. New float glass lines with Chinese investment are expected to commence production by 2026-2027, potentially raising domestic capacity to over 20 million m²/year, though the supply-demand gap will persist in the near term.

Total Flat Glass Demand 24-26 million m²/year

Domestic Production ~14-16 million m²/year

Supply-Demand Gap **8-12 million m²/year**

New Capacity Expected +5 million m²/year (by 2027)

Source: Uzbekistan Building Materials Industry Association, Asl Oyna public capacity data; Q4 2025 data, prior values carried forward as of July 2026

Intermediate and Raw Material Value

Soda ash accounts for 30%-40% of glass raw material costs, making it a critical intermediate product affecting glass product costs. China-origin light soda ash FOB prices are approximately USD 230-260/tonne, with CIF prices to Uzbekistan at approximately USD 250-320/tonne (including freight and insurance). Domestic quartz sand mine-gate prices are approximately USD 15-25/tonne, while high-purity quartz sand import CIF prices are approximately USD 60-90/tonne.

Raw Material	China Origin Price	Uzbekistan CIF	Cost Share
Soda Ash (Light)	RMB 1,550-1,800/t	USD 250-320/t	30%-40%
High-Purity Quartz Sand	RMB 350-500/t	USD 60-90/t	15%-20%
Sodium Sulfate	RMB 280-380/t	USD 45-65/t	5%-8%

Source: Longzhong Information, SCI99; raw material price monitoring, Q4 2025 data

Source: Longzhong Information (soda ash), SCI99 (quartz sand); December 2025 data

Trade and Macro Indicators

Uzbekistan's GDP growth rate in 2024 was approximately 5.8%, with construction sector growth at approximately 7%, making it one of the fastest-growing economies in Central Asia. Bilateral trade between China and Uzbekistan continues to grow, and annual imports of glass raw materials and products amount to approximately USD 150-220 million. Uzbekistan's exchange rate is relatively stable, at approximately USD 1 = 12,700-12,900 UZS, and the government encourages foreign investment in the building materials sector.

GDP Growth Rate (2024) **~5.8%**

Construction Sector Growth ▲ ~7%

Annual Glass Imports ~USD 150-220 million

Exchange Rate (USD/UZS) ~1:12,700-12,900

Source: World Bank, Central Bank of Uzbekistan, State Statistics Committee of Uzbekistan; full year 2024 and Q4 2025 data

Risks and Opportunity Windows

⚠ Risk Advisory In terms of geopolitics, the overall situation in Central Asia is stable but with regional uncertainties. Exchange rate fluctuations may affect import costs. Logistics corridors rely on China-Europe Railway Express and cross-border road transport, with freight costs rising during capacity constraints. On the opportunity side, Uzbekistan's new construction policies promote green building material demand, localization substitution policies offer tax incentives for foreign-invested plants, and the China-Uzbekistan bilateral cooperation framework presents broad prospects for glass industry chain investment.

Geopolitical Risk	Central Asia overall stable, localized uncertainties exist
Exchange Rate Risk	UZS fluctuation range ~±3%-5%/year
Logistics Risk	China-Europe Railway Express seasonal freight rate volatility
Opportunity Window	**Foreign building materials enterprises eligible for 5-7 year tax incentives**

Source: Ministry of Investment and Foreign Trade of Uzbekistan, World Bank Doing Business Report; Q4 2025 data

Data Sources Summary

Longzhong Information — Soda ash and flat glass price monitoring report (Q4 2025)

General Administration of Customs of China — China-Uzbekistan bilateral trade statistics (Q4 2025)

Customs Committee of Uzbekistan — Commodity import classification data (Q4 2025)

World Bank — Uzbekistan macroeconomic report (2024-2025)

Central Bank of Uzbekistan — Exchange rate data (Q4 2025)

SCI99 — Glass raw material market weekly report (December 2025)

State Statistics Committee of Uzbekistan — National economy and construction sector data (Full year 2024)

UN Comtrade — International commodity trade statistics database (2025)

Uzbekistan Building Materials Industry Association — Glass industry capacity and consumption report (2025)