Uzbekistan Ceramic Raw Materials Overseas Market Analysis Report

Target Country: Uzbekistan

Main Category: Ceramic Raw Materials

Report Update Date: July 4, 2026

Uzbekistan Ceramic Raw Materials Core Conclusions

In H1 2026, Uzbekistan's ceramic raw materials market maintained its "high import dependence, high logistics cost" profile. Despite abundant local kaolin reserves, processing technology shortcomings lead to heavy reliance on Chinese imports for high-quality materials. Driven by "New Uzbekistan" infrastructure plans, tile demand pulled raw material consumption up year-on-year. Core risks focus on the progress of local technology substitution and tightening import policy compliance standards.

12.5% YoY increase in ceramic raw material trade with China

⚠ Major Change: Starting July 2026, Uzbekistan enforces new radionuclide limits on imported raw materials, causing customs clearance issues for some lower-grade Chinese materials and increasing average compliance costs by $5-8/ton.

Source: China Customs, Uzbekistan Standardization Agency, Jul 2026

Supply and Demand Fundamentals

Uzbekistan's 2026 projected ceramic raw material consumption exceeds 1.8 million tonnes, but local qualified supply is only about 1.2 million tonnes, creating a static gap of 0.6 million tonnes. Construction ceramics (tiles, sanitaryware) are the absolute main consumers, accounting for over 75%, while daily-use porcelain and electrical ceramics demand remains stable. China is the primary source filling this gap.

Metric	2025 Full Year	2026 H1
Apparent Consumption (10k tonnes)	165	92.4
Local Supply (10k tonnes)	108	58.3
Total Imports (10k tonnes)	57	34.1
Import Dependence	34.5%	36.9%

Source: State Statistics Committee of Uzbekistan, China Customs, Jul 2026

China Market Status

In Q2 2026, China's domestic ceramic raw material market saw ample supply with generally stable prices. Washed kaolin and feldspar prices in Shanxi and Hebei production areas remained low. Impacted by the decline in domestic real estate completions, ceramic factory operating rates hovered around 70%, and export-oriented processing plants showed strong willingness to ship to Central Asian markets like Uzbekistan.

China Representative Raw Materials	Origin	Price (CNY/ton)
Washed Kaolin (Al_2O_3 35%)	Xinzhou, Shanxi	480 - 520
Sodium Feldspar Powder (Na_2O 8%)	Lingshou, Hebei	380 - 420
Ceramic Quartz Sand	Donghai, Jiangsu	210 - 260
Industry Average Operating Rate	Shandong/Guangdong Production Areas	72.5%

Source: Longzhong Info, 100ppi.com, Jul 3, 2026

Uzbekistan Market Status

Uzbekistan's local raw material market exhibits a dual structure of "abundant cheap raw ore, scarce expensive concentrates." Locally processed kaolin's delivered price is about 60% of imported material, but its whiteness and stability are insufficient, limiting it to low-end tiles. CIF prices for Chinese washed kaolin are approximately 1.5-1.8 times the FOB price, mainly hindered by the CKU railway capacity bottleneck and logistics costs from dual-gauge track changes.

32.8% China's market share of Uzbekistan's ceramic raw material imports

Source: State Statistics Committee of Uzbekistan, UzDaily, Jun 2026

Product Segment Structure

In the import structure, kaolin and plastic ball clays hold the highest value share at 41%; feldspar and quartz flux/backbone materials account for about 32%; glaze components (frits, stains) are steadily increasing, reflecting upgrades in Uzbekistan's local glazing line processes.

Segment Category	2026 H1 Import Value (10k USD)	YoY Change
Kaolin, Clay	1,320	+15.2%
Feldspar, Quartz	1,040	+9.8%
Glaze Frits, Stains	490	+21.5%
Alumina, Saggars	340	+2.1%

Source: China Customs (HS 2507/2529/3207), Jul 2026

Core Finished Product Supply & Demand

Tiles, as the core finished product, see Uzbekistan's local output projected at 95 million sq.m. in 2026, though the high-end vitrified tile gap still relies on imports. Impacted by raw material costs and exchange rates, the average ex-factory price for Uzbek local tiles rose 8.2% month-on-month in H1 2026. Chinese-invested local tile production lines have accelerated import substitution in the low-mid market.

95M Sq.M Estimated 2026 Uzbekistan Annual Tile Output

Source: Uzqurilishmateriallari, Ceramic World Review, Jul 2026

Intermediate Goods & Raw Material Value

Raw material costs account for 35-40% of total tile production costs. In Q2 2026, influenced by stable Chinese production area prices but asynchronous declines in international sea/land freight, Uzbekistan's CIF prices for intermediates (e.g., ball-milled clay, spray-dried powder) remained at historical highs. The profit margin for local beneficiation intermediates is being squeezed by logistics costs.

Raw Materials/Intermediates	China Avg. Price (FOB)	Uzbekistan CIF Estimate
Washed Kaolin	$65-75 /ton FOB	$115-130 /ton CIF
High-Whiteness Na-Feldspar	$55-65 /ton FOB	$98-110 /ton CIF
Zircon Flour (65% ZrO_2)	$1,820-1,900 /ton	$2,050-2,180 /ton

Source: Mysteel, Longzhong Info, Uzbekistan Customs Valuation DB, Jul 2026

Trade & Macro Indicators

Under the Belt and Road Initiative framework, China remains Uzbekistan's largest trading partner. Bilateral trade volume exceeded $3 billion in Q1 2026, and the UZS/CNY exchange rate remained relatively stable. Uzbekistan implements immediate VAT refunds on imported ceramic building material machinery and raw materials, reducing tax-related entry costs for Chinese suppliers.

5.6% Uzbekistan 2026 Q1 Real GDP Growth Rate

Source: World Bank, MOFCOM, Central Bank of Uzbekistan, Jul 2026

Risk & Opportunity Windows

Risks: Breakthroughs in local kaolin beneficiation technology could impact Chinese raw material share; Uzbekistan's new radiation standards increase supply chain compliance barriers. Opportunities: The "New Uzbekistan" 2026-2028 mass social housing construction drives annual tile demand exceeding 120 million sq.m.; Chinese enterprises can leverage the opening of the CKU railway to invest in local Central Asian raw material processing, enjoying territorial tax rebates.

Source: Ministry of Housing and Communal Services of Uzbekistan, Commercial Office of Chinese Embassy in Uzbekistan, Jul 2026

Core Data Sources

- China Customs "Monthly Import/Export Commodity Reports" Jan-Jun 2026
- State Statistics Committee of Uzbekistan "Foreign Trade Briefs" Q1/Q2 2026
- Longzhong Info "China Kaolin, Feldspar Market Weekly Review" Wk 27 2026
- 100ppi.com "Inorganic Chemicals Price Monitor" Jul 3, 2026
- Mysteel "Non-metallic Minerals Price Index" Jul 2026 Update
- World Bank "Uzbekistan Economic Update" Jul 2026
- MOFCOM "Country Guide for Overseas Investment Cooperation - Uzbekistan" 2026 Ed.
- Uzqurilishmateriallari (Uzbekistan Construction Materials Industry Association) Data