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Uzbekistan Refractory Materials Overseas Market Analysis Report

Target Country: Uzbekistan   Main Category: Refractory Materials

▯ Report Updated: July 4, 2026

Uzbekistan Refractory Materials Key Takeaways

Uzbekistan's refractory materials market has an **import reliance exceeding 85%**, with China as the top supplier (approximately 46% share). The 2025 market size is estimated at **USD 130 million**, driven by annual steel output growth of 6% and expanding infrastructure; demand continues to trend upward. ⚠ Monitor Elevated magnesia raw material prices in H1 2026 combined with som exchange rate volatility are increasing import cost pressure. Local substitution capacity is developing slowly, making the import-dominated structure unlikely to change in the medium term.

- Import reliance: **>85%** (2025)
- China supply share: **~46%** (2025 customs data)
- Market size: **~USD 130 million** (2025 est.)

Source: General Administration of Customs of China (full-year 2025); industry estimates (Dec 2025)

Supply & Demand Fundamentals

Uzbekistan's domestic refractory production capacity is below **30,000 tonnes**, far short of the annual consumption requirement of approximately **180,000–200,000 tonnes**. The supply gap is filled mainly by imports from China, Russia, and Turkey. Key consumption sectors are steel (~55%), cement (~25%), glass and non-ferrous metals (~20%).

Indicator	2024	2025	YoY Change
Domestic capacity (10k tonnes)	2.5	2.7	+8%
Domestic consumption (10k tonnes)	17.0	18.5	+8.8%
Imports (10k tonnes)	14.8	16.1	+8.8%
Import reliance	87%	87%	Flat

Source: State Statistics Committee of Uzbekistan (2025 annual report, released Feb 2026); Mysteel industry estimates (Dec 2025)

China Market Status

In H1 2026, China's refractory industry operating rate was approximately **62%**, with capacity utilization at a moderate level. The ex-factory average price of magnesia (97% purity) was about **CNY 3,550/tonne**, up roughly 6% year-on-year. Exports to Uzbekistan continue to grow, with full-year 2025 export volume at approximately **74,000 tonnes**, up about 11% YoY.

- Industry operating rate: **62%** (Jun 2026, Mysteel)
- Magnesia 97% ex-factory: **CNY 3,550/tonne** (Jun 2026)
- Exports to Uzbekistan: **~74,000 tonnes** (full-year 2025) ▲11%

Source: Mysteel (Jun 2026); 100ppi.com (magnesia price, Jun 2026); General Administration of Customs of China (full-year 2025)

Uzbekistan Market Status

Uzbekistan's refractory market is highly import-dependent, with 2025 import value at approximately **USD 110 million**. Main source countries: China (46%), Russia (22%), Turkey (15%), Kazakhstan (8%). The steel sector dominates consumption, with Uzmetkombinat and other steel mills as the largest end-users. Local products are mainly low-end fireclay bricks, while high-end magnesia-based materials are almost entirely imported.

Import Source	Share (2025)	Main Products
China	46%	Magnesia bricks, high-alumina bricks, castables
Russia	22%	Magnesia-chrome bricks, carbon bricks
Turkey	15%	Fireclay bricks, monolithic materials
Kazakhstan	8%	Aluminosilicate refractories

Source: State Statistics Committee of Uzbekistan (released Feb 2026); General Administration of Customs of China (2025)

Product Segment Structure

Uzbekistan's refractory imports are dominated by **aluminosilicate** and **magnesia-based** materials, which together account for over 70% of the total. In 2025, aluminosilicate imports were approximately 65,000 tonnes (average ~USD 520/tonne), and magnesia imports were approximately 52,000 tonnes (average ~USD 780/tonne). Monolithic refractories (castables, ramming mixes) show the fastest demand growth at approximately 14% per annum.

Segment	2025 Imports (10k tonnes)	Avg. Price (USD/tonne)	YoY Demand Trend
Aluminosilicate (high-alumina / fireclay bricks)	6.5	520	▲7%
Magnesia (magnesia / magnesia-chrome bricks)	5.2	780	▲9%
Monolithic materials	3.1	450	▲14%

Source: Mysteel segment import tracking (Dec 2025); 100ppi.com price monitoring (2025)

Core Finished Products Supply & Demand

Magnesia bricks and aluminosilicate bricks are the core finished products in the Uzbekistan market. In 2025, magnesia brick imports were approximately **38,000 tonnes**, with a supply gap of about 36,000 tonnes; aluminosilicate brick imports were approximately 50,000 tonnes, with a gap of about 45,000 tonnes. Chinese-origin magnesia bricks on a CIF Tashkent basis are priced at approximately **USD 820–880/tonne**, up about 5% from 2024.

Finished Product	Domestic Output (10k tonnes)	Imports (10k tonnes)	CIF Price (USD/tonne)
Magnesia / magnesia-chrome bricks	0.2	3.8	820–880
High-alumina bricks	0.5	5.0	550–620
Refractory castables	0.3	2.8	380–450

Source: Mysteel (Dec 2025); Argus Media Industrial Minerals Report (Q4 2025)

Intermediate & Raw Material Value

Core refractory raw materials include magnesia, bauxite, and silicon carbide. As of June 2026, Chinese ex-factory prices were: Liaoning magnesia (97%) at approximately **CNY 3,550/tonne** (~USD 490/tonne), Shanxi bauxite (85%) at approximately **CNY 1,850/tonne**. Uzbek importers' indicative CIF prices for magnesia are approximately **USD 620–660/tonne**, with freight and Central Asian land transport costs accounting for 18–22% of total cost.

Raw Material	China Ex-factory Price	Uzbekistan CIF Indicative Price	Spread (Logistics + Tariff)
Magnesia (97%)	USD 490/tonne	USD 620–660/tonne	~USD 130–170
Bauxite (85%)	USD 255/tonne	USD 340–370/tonne	~USD 85–115

Source: 100ppi.com (Jun 2026); SCI99 (Jun 2026); logistics industry estimates (Q2 2026)

Trade & Macro Indicators

Uzbekistan's 2025 GDP growth rate was approximately **5.8%**, with the industrial value-added share rising to **33%**. Bilateral trade between China and Uzbekistan reached approximately **USD 14.5 billion** in 2025, of which refractory-related trade was around USD 110 million. The UZS/USD exchange rate in June 2026 was approximately **12,650:1**, reflecting an intra-year depreciation of about 4%. Uzbekistan applies a 5–10% import tariff on refractory materials, with some categories enjoying Most-Favored-Nation treatment.

- GDP growth: **5.8%** (2025, World Bank)
- China–Uzbekistan bilateral trade: **~USD 14.5 billion** (2025)
- UZS exchange rate: **1 USD ≈ 12,650 UZS** (Jun 2026)
- Import tariff: **5–10%** (refractory materials)

Source: World Bank (updated Apr 2026); Central Bank of Uzbekistan (Jun 2026); MOFCOM of China (2025)

Risk & Opportunity Window

Risks: Persistent som depreciation increases import costs; Central Asian overland transport corridors face geopolitical uncertainty; intensified low-price competition from Russia. **Opportunities:** Uzbekistan's "New Industrial Strategy" aims to raise domestic steel output to 2 million tonnes/year, driving refractory demand; under the China–Uzbekistan production capacity cooperation framework, Chinese refractory enterprises can explore localized joint-venture production to mitigate logistics and currency risks.

> ⚠ Key risk alert: Som depreciation expectations are strengthening in H2 2026; export contracts are advised to use USD denomination or locked-in exchange rate clauses. Central Asian railway capacity bottlenecks may push up logistics costs in Q4.

Source: Ministry of Investment and Foreign Trade of Uzbekistan (industrial plan, Mar 2026); World Bank Central Asia Economic Brief (Apr 2026)

🗂 Data Sources Summary (At Least 5 Independent Sources)

- **General Administration of Customs of China** — 2025 full-year export statistics
- **Mysteel** — Refractory industry operating rate, import/export tracking (Dec 2025 / Jun 2026)
- **100ppi.com** — Magnesia, bauxite and other raw material price monitoring (Jun 2026)
- **State Statistics Committee of Uzbekistan** — 2025 industrial and trade annual report (released Feb 2026)
- **World Bank** — Uzbekistan macroeconomic data (updated Apr 2026)
- **Central Bank of Uzbekistan** — Official UZS exchange rate data (Jun 2026)
- **Argus Media** — Industrial minerals international price report (Q4 2025)
- **SCI99** — Bauxite price data (Jun 2026)
- **Ministry of Commerce of China (MOFCOM)** — China–Uzbekistan bilateral trade statistics (2025)