Uzbekistan Glass Equipment Overseas Market Analysis Report

Target Country: Uzbekistan | Main Category: Glass Equipment | Report Date: July 5, 2026

Key Conclusions on Uzbekistan Glass Equipment

Driven by both construction and automotive sectors, Uzbekistan's demand for imported glass equipment remains robust. In H1 2026, China's glass equipment exports to Uzbekistan grew approximately 18% year-on-year, with import dependency for float glass and deep-processing equipment exceeding 75%. Localization policies are accelerating, yet equipment gaps remain pronounced in the short to medium term, while prices stay elevated due to raw material and logistics costs.

- 2026 Q1 China's glass equipment exports to Uzbekistan approx. **USD 42 million**, +18.3% YoY
- Uzbekistan glass equipment import dependency: **76%**, China accounts for ~52%
- Equipment procurement budget for new float lines near Tashkent approx. **USD 85 million**
- 2026 estimated Uzbekistan flat glass consumption: **1.85 million tons**, with overlapping equipment renewal and expansion demand

Source: China Customs export statistics (released May 2026); State Statistics Committee of Uzbekistan (2026 Q1 report)

Supply & Demand Fundamentals

Uzbekistan's glass market is characterized by supply shortage. In 2025, domestic flat glass production was approximately 1.52 million tons against consumption of 1.78 million tons, with a 260,000-ton deficit filled by imports. Capacity expansion commenced in 2026, but given long equipment delivery cycles, tight supply-demand balance is expected to persist until 2027.

Indicator	2024	2025	2026E
Domestic output (million tons)	138	152	165
Consumption (million tons)	162	178	185
Net imports (million tons)	24	26	20
Equipment imports (USD 100M)	1.35	1.58	1.82

Source: Uzbekistan Building Materials Industry Association (March 2026 industry report); World Bank Uzbekistan Economic Brief (April 2026)

China Market Status

China's glass equipment manufacturing industry maintains high capacity utilization, with an operating rate of approximately 82% in Q1 2026. Export competitiveness of float glass equipment continues to strengthen, with average export prices to Central Asia rising approximately 5.6% over the same period in 2025, primarily driven by steel and core component costs.

- 2026 Q1 China glass machinery industry operating rate: **82%**, capacity utilization: 78%
- Float glass equipment avg. export price: **+5.6% YoY**; deep-processing equipment avg. price: +4.2%
- Of equipment exported to Uzbekistan, complete float line sets account for **38%**, deep-processing equipment: 45%
- 2026 Q1 China total glass equipment exports approx. **USD 890 million**, Central Asia share rises to 7.2%

Source: China Glass Industry Association (May 2026 industry briefing); China Customs HS codes 8474/8475 export statistics (April 2026)

Uzbekistan Market Status

Uzbekistan's glass equipment market is predominantly import-driven, with imports totaling approximately USD 158 million in 2025. China is the largest supplier (52%), followed by Germany (18%), Italy (11%), and Turkey (9%). Construction glass consumption accounts for 62%, automotive glass 21%, and household glass 17%.

Supplier Country	2025 Import Value (USD 10K)	Share
China	8,200	52%
Germany	2,840	18%
Italy	1,740	11%
Turkey	1,420	9%

Source: State Statistics Committee of Uzbekistan foreign trade statistics (released February 2026); UN Comtrade database (updated Q1 2026)

Sub-Product Structure

Among imported glass equipment categories, complete float glass production line equipment holds the largest share, followed by tempering/insulating/laminating deep-processing equipment. In 2026, coating glass equipment demand growth is the fastest, benefiting from energy-saving building policies that promote Low-E glass adoption.

Sub-Category	2025 Import Value (USD 10K)	YoY Growth
Float glass production line equipment	5,520	+16%
Tempering / Insulating / Laminating equipment	4,380	+22%
Glass cutting / edge grinding equipment	2,860	+10%
Coating / printing equipment	2,040	+31%

Source: Uzbekistan customs classified import data (March 2026 industry summary); China Glass Machinery Export Annual Report (December 2025)

Core Finished Product Supply & Demand

Uzbekistan's flat glass (core finished product) supply-demand gap persists. In H1 2026, ex-factory prices for flat glass in the Tashkent area were approximately USD 185/ton, with CIF import prices at approximately USD 210/ton. Tempered glass processing capacity is insufficient, with approximately 40% relying on imported finished products.

- 2026 H1 Tashkent flat glass ex-factory price: **USD 185/ton**, +8.2% YoY
- Imported flat glass CIF price: **USD 210/ton**, price spread approx. USD 25/ton
- Domestic tempered glass processing fulfillment rate: approx. **60%**; insulating glass: approx. 55%
- 2026 estimated new float capacity: **180,000 tons/year**, equipment now in installation phase

Source: Uzbekistan Building Materials Price Monitoring Center (June 2026 data); Argus Media Central Asia building materials weekly price report (3rd week of June 2026)

Intermediates & Raw Material Value

Core glass-making raw materials—silica sand and soda ash—show steady price increases. Uzbekistan has abundant local silica sand resources but insufficient beneficiation capacity; some high-purity silica sand is still imported from China. Specialty steel and refractory material costs for equipment show clear price transmission.

Raw Material / Intermediate Product	China Production Price (Jun 2026)	Uzbekistan CIF Reference Price
Premium silica sand (beneficiated)	CNY 280/ton	~USD 52/ton
Soda ash (light)	CNY 2,100/ton	~USD 310/ton
Refractory bricks for equipment	CNY 4,800/ton	~USD 720/ton

Source: Longzhong Information soda ash price monitoring (June 2026); 100ppi.com silica sand prices (June 2026); Uzbekistan importer procurement quotations (using prior values, 2026 Q1)

Trade & Macro Indicators

Uzbekistan's macroeconomy maintains steady growth, with 2026 GDP growth forecast at 5.6%. Bilateral trade between China and Uzbekistan continues to expand, with machinery and equipment products enjoying preferential tariff treatment. The construction sector accounts for approximately 6.8% of GDP, serving as the core driver of glass equipment demand.

- 2026 Uzbekistan GDP growth (forecast): **5.6%**, construction sector growth: 7.1%
- 2025 China-Uzbekistan bilateral trade volume: **USD 12.8 billion**, +14% YoY
- Machinery & equipment import tariff preferential rate: **0%-5%** (under localization investment policy)
- USD/UZS exchange rate: **1:12,650** (June 2026, volatility ~3%)

Source: World Bank (April 2026 Global Economic Prospects); Central Bank of Uzbekistan exchange rate announcement (June 2026); China Ministry of Commerce China-Uzbekistan Trade Brief (2026 Q1)

Risks & Opportunity Windows

Geopolitical stability remains, but logistics corridors face fluctuation risks, with tightening capacity on the Trans-Caspian transport corridor. Local substitution policies bring opportunities for local equipment assembly; Chinese enterprises can gain first-mover advantage through technical cooperation and joint venture models. Exchange rate volatility and payment cycles require close attention.

- Risk Trans-Caspian transport freight rates rose **+12%** in H1 2026, impacting equipment delivery costs
- Risk UZS depreciation pressure against USD may delay importer payment willingness
- **Opportunity** Uzbekistan approved 3 new glass industrial parks in 2026, with equipment demand of ~USD 220 million
- **Opportunity** China-Uzbekistan bilateral investment agreement upgrade boosts export financing support for equipment

Source: Uzbekistan Ministry of Investment and Foreign Trade (May 2026 announcement); Trans-Caspian International Transport Association freight index (June 2026); Export-Import Bank of China Central Asia business briefing (2026 Q2)

Data Sources Summary

General Administration of Customs of China — Import & export statistics (released April-May 2026)

State Statistics Committee of Uzbekistan — Foreign trade & industry statistics (2026 Q1-Q2)

Uzbekistan Building Materials Industry Association — Glass industry report (March 2026)

World Bank — Uzbekistan Economic Brief (April 2026)

China Glass Industry Association — Industry briefing & export data (May 2026)

Longzhong Information — Soda ash & raw material price monitoring (June 2026)

100ppi.com — Bulk raw material prices including silica sand (June 2026)

Argus Media — Central Asia building materials weekly price report (June 2026)

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Uzbekistan Ministry of Investment and Foreign Trade — Industrial policy announcements (May 2026)

Ministry of Commerce of China — China-Uzbekistan Trade Brief (2026 Q1)