Uzbekistan Tissue Paper Overseas Market Analysis Report

Target Country: Uzbekistan | Main Category: Tissue Paper

 Report Update Date: July 5, 2026

Uzbekistan Tissue Paper Key Conclusions

The Uzbekistan tissue paper market is characterized by **high import dependence, low per capita consumption, and rapid growth**. Domestic production capacity is weak, with approximately 75%–80% of demand met by imports, while Chinese products continue to expand their market share. Pulp raw material price fluctuations pose the main cost risk, yet per capita consumption is only about 3.5 kg/year—well below the global average—indicating significant medium-to-long-term growth potential.

 Annual import volume: approx. **100,000–150,000 tons** , import dependency approx. **75%–80%**

 Per capita consumption: approx. **3.5 kg/year** (global avg. approx. 7.5 kg)

 China's share in Uzbekistan imports: approx. **22%–28%** , trending upward ↑

⚠ Core risks: Pulp price volatility | FX risk | High logistics costs

Sources: General Administration of Customs of China, World Bank, UN Comtrade | Data as of Q4 2025; some figures carried forward

Supply & Demand Fundamentals

Uzbekistan's annual tissue paper demand is approximately 120,000–150,000 tons, while domestic output stands at only about 30,000–40,000 tons, revealing a significant supply gap. The main consumption categories are toilet paper (approx. 65%), facial tissue (approx. 20%), and kitchen towels (approx. 10%), with emerging categories such as wet wipes growing rapidly. Imports fill the vast majority of the supply shortfall.

Indicator	Value	YoY Change
Annual demand	120,000–150,000 t	+5% to +7%
Domestic production	30,000–40,000 t	+3%
Net imports	90,000–110,000 t	+6% ↑
Import dependency	75%–80%	Flat

Sources: State Statistics Committee of Uzbekistan, UN Comtrade | Data as of 2025; 2026 figures carried forward

China Market Overview

China is the world's largest tissue paper producer, with 2024 output at approximately 12.5 million tons and an operating rate maintained at 72%–75%. The domestic market is fiercely competitive, making exports a vital growth pillar. In 2024, China's tissue paper exports totaled around 900,000 tons, with Central Asia posting leading growth; exports to Uzbekistan increased by approximately 12%–15% year-on-year.

□ Annual output: approx. **12.5 million tons** (2024, China Paper Association)

□ Annual exports: approx. **900,000 tons** ; to Uzbekistan approx. **20,000–28,000 tons**

⚙ Industry operating rate: **72%–75%** , ample capacity

□ Domestic avg. price: toilet paper base paper approx. **CNY 6,800–7,500/t** (Q4 2025)

Sources: China Paper Association Annual Report, General Administration of Customs of China, Sublime China Information | Data as of Q4 2025

Uzbekistan Market Overview

Uzbekistan's tissue paper retail market is dominated by mid-to-low-end products with high price sensitivity. Imported products mainly originate from Russia (approx. 40%–45% share), China (approx. 22%–28%), and Turkey (approx. 12%–16%). Local retail channels are predominantly traditional markets and small-to-medium supermarkets, with relatively low brand concentration.

Import Source	Share	Trend
Russia	40%–45%	Stable
China	22%–28%	↑ Growing
Turkey	12%–16%	Stable
Others	15%–20%	—

Sources: UN Comtrade, Uzbekistan Customs data | Data as of Q3 2025; 2026 figures carried forward

Product Segment Breakdown

Toilet paper is the dominant category in Uzbekistan's tissue paper market, accounting for approximately 65% of total consumption. Facial tissue and kitchen towels together represent around 30%, while emerging categories such as wet wipes, though small in base, show the fastest growth. Among Chinese exports, toilet paper base paper and finished products hold the highest share, with outstanding cost-effectiveness advantages.

Product Segment	Consumption Share	Annual Growth
Toilet Paper	~65%	+4% to +5%
Facial Tissue / Napkins	~20%	+6% to +8%
Kitchen Towels	~10%	+7% to +9%
Wet Wipes & Others	~5%	+10% to +14% ↑

Sources: Industry estimates, UN Comtrade classification data | Data as of 2025; 2026 figures carried forward

Core Finished Product Supply & Demand

Toilet paper, as the core finished product, faces an annual domestic supply gap of approximately 70,000–90,000 tons in Uzbekistan. Local retail prices for toilet paper stand at around 2,800–3,500 Uzbek som per roll (approx. USD 0.22–0.28), markedly influenced by import costs and exchange rate fluctuations. Chinese-origin toilet paper is priced approximately 8%–12% lower than Russian products.

▯ Annual toilet paper supply gap: approx. **70,000–90,000 tons**

▯ Local retail price: **2,800–3,500 som/roll** (approx. USD 0.22–0.28)

▯ Chinese product price advantage: **8%–12%** lower vs. Russian products

▯ Inventory level: importer inventory cycle approx. **30–45 days** , relatively low

Sources: Uzbekistan retail monitoring, China Customs export data | Data as of Q4 2025

Intermediate Goods & Raw Material Value

The core raw materials for tissue paper are **bleached softwood kraft pulp** and **bleached hardwood kraft pulp**. From 2024 into early 2025, pulp prices experienced an initial rise followed by a decline. Current CFR Central Asia prices for bleached softwood pulp are approximately USD 720–780 per ton, with raw material costs accounting for 55%–65% of finished product value. ⚠ Pulp price volatility remains the largest cost variable.

Raw Material	China Mill Price	CFR Central Asia Est.
Bleached Softwood Pulp	USD 680–750/t	USD 720–780/t
Bleached Hardwood Pulp	USD 550–620/t	USD 590–660/t
OCC (Recycled Fiber)	USD 180–220/t	USD 210–250/t

Sources: Sublime China Information, 100ppi.com, Fastmarkets | Price data as of Q4 2025; July 2026 figures carried forward

Trade & Macro Indicators

Uzbekistan's economy maintains steady growth, with GDP expanding around 5.5% in 2024 and a population of approximately 36.5 million featuring a young demographic structure. Bilateral trade between China and Uzbekistan continues to expand, with tissue paper import tariffs at approximately 5%–8%. Improved logistics corridors under China's Belt and Road Initiative are conducive to lowering transportation costs.

Indicator	Value	Source
GDP growth	5.5% (2024)	World Bank
Population	~36.5 million	State Statistics Committee
Import tariff	5%–8%	Uzbekistan Customs
Exchange rate	USD 1 ≈ 12,700 som	Central Bank of Uzbekistan

Sources: World Bank, State Statistics Committee of Uzbekistan, Central Bank of Uzbekistan | Data as of 2025

Risks & Opportunity Windows

Key risks include: significant pulp price fluctuations driven by global supply-demand dynamics; potential depreciation of the Uzbek som which may increase import costs; and logistics capacity bottlenecks along Central Asian corridors. Opportunities lie in: policy-encouraged investments in localized production; substantial room for per capita consumption growth; and the continued widening of Chinese products' cost-effectiveness advantage.

⚠ Risk Pulp price fluctuation range up to ±15% per year

⚠ Risk Som annual depreciation approx. 5%–8%

□ **Opportunity** : Government encouraging local paper-making investment; tax incentives available for foreign investors

□ **Opportunity** : If per capita consumption rises to 5 kg, incremental market demand exceeds 50,000 tons

Sources: World Bank Doing Business Report, Uzbekistan Investment Promotion Agency | Data as of 2025

□ Data Source Summary (At Least 5 Independent Sources)

1. General Administration of Customs of China — Import and export statistics (HS Code Chapter 48), 2024–2025
2. China Paper Association — Annual tissue paper production and industry operation data, 2024 Annual Report
3. Sublime China Information / 100ppi.com — Pulp and finished paper price monitoring data, Q4 2025
4. World Bank — Uzbekistan macroeconomic indicators (GDP, population, etc.), 2024
5. State Statistics Committee of Uzbekistan — Domestic production and consumption data, 2025
6. UN Comtrade — International trade classification data (HS4803, 4818, etc.), 2024–2025
7. Fastmarkets / Argus Media — Global pulp price indices, Q4 2025
8. Central Bank of Uzbekistan — Exchange rate and monetary policy, 2025

Note: For July 2026, some figures have no public update available; relevant indicators use the latest available data (Q3–Q4 2025 or 2024 annual data), as noted in each card's source line.