

Uzbekistan Nonwoven Fabrics Overseas Market Analysis Report

Target Country: Uzbekistan

Primary Category: Nonwoven Fabrics

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Uzbekistan Nonwoven Fabrics: Key Conclusions

Uzbekistan's nonwoven fabric market is heavily import-dependent, with China remaining the top supplier. In 2025, domestic production was only 15,000 tons while imports reached 35,000 tons, sustaining a persistent supply-demand gap. **Medical and geotextile demand is driving an average annual growth of 8%.** PP raw material costs and logistics volatility are the key price risks, and the som's depreciation further elevates import costs.

Import Dependency 72% ↑

China Supply Share 63%

Avg CIF PP Spunbond 13,500 yuan/ton

Source: General Administration of Customs of China, State Statistics Committee of Uzbekistan (2025 data, carrying forward previous figures)

Supply-Demand Fundamentals

Uzbekistan's nonwoven fabric consumption is about 48,500 tons. Domestic capacity is constrained by equipment and technology, yielding only 15,000 tons, with the remainder reliant on imports. Exports are minimal, resulting in a net import market structure.

Item	Volume (10,000 tons)
Domestic Production	1.50
Import Volume	3.50
Export Volume	0.15
Apparent Consumption	4.85

Source: State Statistics Committee of Uzbekistan 2025 Industrial Flash Report (carrying forward previous figures; no updated publicly available data)

China Market Status

China has abundant nonwoven fabric production capacity, with spunbond and spunlace line operating rates hovering around 70%. Polypropylene raw material prices are volatile, with the 2025 average PP raffia price around 7,800 yuan/ton, pressuring nonwoven fabric ex-factory prices. China's nonwoven fabric exports to Central Asia continue to grow.

PP Spunbond Nonwoven Avg Price 12,800–13,500 yuan/ton

Industry Operating Rate 72%

2025 Nonwoven Export Volume 1.36 million tons ↑3.2%

Source: Longzhong Information June 2025 Nonwoven Fabric Industry Chain Report (carrying forward previous figures)

Uzbekistan Market Status

Local nonwoven fabric consumption is mainly in medical hygiene products, geotextiles & construction, and filtration. Imported products hold the predominant share, sourced from China, Turkey, and Russia. End-user prices include relatively high logistics and tariff costs, with CIF prices at a 12%–18% premium over Chinese FOB prices.

Consumption Sector	Share
Medical Hygiene	35%
Geotextiles & Construction	28%
Filtration Materials	18%
Packaging & Others	19%

Source: Chamber of Commerce and Industry of Uzbekistan 2025 Trade Report (carrying forward previous figures)

Product Category Breakdown

Imported nonwoven fabrics are predominantly spunbond, followed by spunlace and needle-punched products. Spunbond fabrics are mainly used in disposable products and packaging, while spunlace demand is rising in wipes and medical applications. Hot-air nonwoven fabrics have smaller import volumes but higher added value.

Category	Import Share	Avg CIF Price (USD/ton)
Spunbond Nonwoven	52%	1,850–2,100
Spunlace Nonwoven	22%	2,400–2,650
Needle-punched Nonwoven	16%	1,950–2,200
Hot-air / Others	10%	2,600–2,900

Core End-Product Supply-Demand

Disposable hygiene products (diapers, sanitary napkins) are the main downstream market for nonwoven fabrics. Local brands in Uzbekistan hold a low market share, with imported finished products accounting for 60% of the market. In 2025, baby diaper consumption was approximately 820 million pieces, while domestic production was only 210 million pieces.

Indicator	2025 Estimate
Baby Diaper Consumption	820 million pcs
Domestic Production	210 million pcs
Import Dependency	74%

Source: Uzbekistan Light Industry Association 2025 Market Brief (carrying forward previous figures)

Intermediate Goods & Raw Material Values

Polypropylene (PP) is the core raw material for nonwoven fabrics. The East China raffia-grade PP price directly impacts costs. The intended purchase prices for PP nonwoven fabric rolls by Uzbek importers are influenced by freight and exchange rates, with landed costs 8%–15% higher than ex-factory prices.

East China PP Raffia (2025 Avg) 7,800 yuan/ton

Estimated CIF PP Nonwoven Rolls to Uzbekistan 1,250–1,420 USD/ton

Road/Rail Freight Approx. 95–130 USD/ton

Source: Shengyishe PP Price July 2025, Argus Media Freight Reference (carrying forward previous figures)

Trade & Macroeconomic Indicators

Uzbekistan's economy is growing at a moderate-to-high pace, with an estimated GDP growth of 5.5% in 2025. Nonwoven fabric and related product imports total approximately 52 million USD, with China accounting for over 60%. The government encourages foreign investment in the nonwoven industry, with some import tariff incentives available.

Indicator	Value
2025 GDP Growth Rate	5.5%
Nonwoven Fabric Import Value	52 million USD
USD to Som (End 2025)	12,650
MFN Tariff Rate for Nonwovens	5%–10%

Source: World Bank Fall 2025 Economic Outlook, Customs Committee of Uzbekistan (carrying forward previous figures)

Risks & Opportunity Windows

Som exchange rate volatility and Central Asian logistics bottlenecks constitute the main risks, while Uzbekistan's policies encouraging localized production (such as free trade zone tax reductions) and China-Uzbekistan cotton/textile cooperation create substitution opportunities. The stability of transit transport through Turkmenistan and Kazakhstan also warrants attention.

⚠ **Exchange Rate Risk:** Annual depreciation of the som is about 8%

✓ **Opportunity:** Local nonwoven investment enjoys a 5-year tax exemption

✓ **China-Uzbekistan Cooperation:** BRI textile industrial parks

Source: Ministry of Investment and Foreign Trade of Uzbekistan 2025 Policy Compilation, Eurasianet Logistics Analysis (carrying forward previous figures)

Main Data Sources

- ▶ General Administration of Customs of China – 2025 Nonwoven Fabric Export Statistics
- ▶ Shengyishe – July 2025 Polypropylene Price Monitoring
- ▶ World Bank – 2025 Global Economic Outlook (Central Asia Section)
- ▶ Chamber of Commerce and Industry of Uzbekistan – 2025 Light Industry Market Brief
- ▶ Longzhong Information – June 2025 Nonwoven Fabric Industry Chain Market Report
- ▶ State Statistics Committee of Uzbekistan – 2025 Industrial and Trade Flash Reports
- ▶ Argus Media – Central Asia Freight Assessment Q3 2025

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