Overseas Market Analysis Report

Uzbekistan Hygiene Product Raw Materials Overseas Market Analysis Report

 Report Date: July 5, 2026 • Target Country: Uzbekistan •

 Main Category: Hygiene Product Raw Materials (SAP / Fluff Pulp / Nonwoven Fabric / Breathable Film Materials)

Uzbekistan Hygiene Product Raw Materials — Key Conclusions

Uzbekistan's hygiene product raw material market has an import dependency exceeding **85%**, with total raw material imports reaching approximately **USD 180 million** in 2024. Chinese SAP and nonwoven fabrics hold a dominant supply position with around **45%** market share. Diaper penetration rose from 35% in 2020 to approximately **48%** in 2025, driving raw material demand growth of 12-15% annually. ⚠ Exchange rate volatility and Uzbekistan's localization policies are key risk variables.

- 2024 Uzbekistan hygiene raw material imports: **USD 182 million**, YoY +16.3%
- China's share of Uzbekistan SAP imports: **47%** (2024 customs data)
- Uzbekistan diaper penetration rate 2025E: approx. **48%**, still below the Central Asian average of 55%
- SAP China FOB price Q4 2025: approx. **USD 1,350-1,480/ton**

Sources: General Administration of Customs of China (Jan 2025), UN COMTRADE (updated Mar 2025), Sunsirs SAP price monitor (Dec 2025)

Supply & Demand Fundamentals

Uzbekistan's total hygiene raw material demand is approximately **120-140k tons/year** (2025E). Local production is nearly nonexistent, with the entire supply-demand gap filled by imports. Diapers and sanitary napkins are the largest consumption drivers, together accounting for over **78%** of raw material consumption.

Indicator	2023	2024	2025E
Total Raw Material Demand (10k tons)	9.8	11.3	13.1
Local Production (10k tons)	0.5	0.6	0.7
Net Imports (10k tons)	9.3	10.7	12.4
Import Dependency	89%	88%	87%

Sources: State Statistics Committee of Uzbekistan (Feb 2025), UN COMTRADE (Mar 2025); 2025 figures are industry estimates

China Market Status

China is the world's largest hygiene raw material producer, with SAP annual capacity of approximately **1.6 million tons** and 2025 industry operating rates at **68-72%**. Nonwoven capacity is ample, with PP spunbond nonwoven prices running in the range of **CNY 14,500-16,800/ton**. Exports to Central Asia have grown notably.

- SAP domestic average price (Dec 2025): **CNY 13,200/ton**, down slightly from start of year ↓3%
- China SAP export volume 2024: **486k tons**, of which Central Asia exports approx. 21k tons
- PP spunbond nonwoven operating rate: **74%** (Q4 2025 Zhuochuang survey)
- Fluff pulp import dependency remains high; China port inventory approx. **280k tons**

Sources: Sunsirs (Dec 2025 SAP price), Longzhong Information (Q4 2025 acrylic acid chain), Zhuochuang Information (Nov 2025 nonwoven), General Administration of Customs of China (Jan 2025)

Uzbekistan Market Status

Uzbekistan's hygiene raw material market is in a rapid expansion phase. SAP CIF Tashkent is approximately **USD 1,580-1,720/ton**, a premium of about 15-18% over China FOB prices. Import sources are diversified, with China, Russia, and Turkey as the top three suppliers.

Import Source Country	2024 Share	Main Categories
China	45%	SAP, Nonwoven, Breathable Film
Russia	22%	Fluff Pulp, Nonwoven
Turkey	14%	SAP, Hot Melt Adhesive
South Korea / Others	19%	SAP, Specialty Materials

Sources: UN COMTRADE (updated Mar 2025), Uzbekistan Customs (2024 annual), industry research estimates

Product Segmentation Structure

Hygiene raw materials can be divided into four categories: **SAP (super absorbent polymer)** holds the largest share at approx. 38%, fluff pulp at 26%, nonwoven fabric at 24%, and breathable film & hot melt adhesives at 12%. SAP has the highest technical barrier and value-add.

Sub-category	2024 Import Volume (10k tons)	Avg. Price Range (USD/ton)	Demand Growth
SAP	4.3	1,550-1,750	+18%
Fluff Pulp	2.9	920-1,100	+10%
Nonwoven (PP Spunbond)	2.7	2,100-2,500	+14%
Breathable Film / Hot Melt	1.4	1,800-2,400	+12%

Sources: UN COMTRADE classification data (Mar 2025), Argus Media chemical prices (Dec 2025), industry estimates

Core Finished Product Supply & Demand

Uzbekistan's diaper market is estimated at approximately **USD 230 million** in 2025, with local brand production accounting for about 35%, while the remainder relies on finished product imports (mainly from Russia and Turkey). The adult incontinence market is small but the fastest-growing segment, growing at over **25%** annually.

- Annual baby diaper consumption: approx. **850 million units** (2025E), local production approx. 300 million units
- Sanitary napkin market size: approx. **USD 95 million**, localization rate approx. 50%
- Adult incontinence products: approx. **USD 42 million**, almost entirely import-dependent
- Per capita diaper consumption in Uzbekistan: approx. **24 units/year**, far below Turkey's 68 units/year

Sources: Euromonitor (Jun 2025 Central Asia hygiene report), Uzbekistan Light Industry Association (Mar 2025)

Intermediate & Raw Material Value Chain

From China production areas to Uzbekistan CIF, raw material prices carry a **15-22%** price differential, driven by international freight, Central Asian inland transport, and tariffs. Acrylic acid (SAP upstream) China price is approximately **CNY 7,200-7,800/ton**, with direct cost pass-through to SAP.

Raw Material / Intermediate	China Ex-works Price	Uzbekistan CIF Estimate	Price Differential
SAP	USD 1,320-1,480/ton	USD 1,580-1,720/ton	+17%
PP Nonwoven	CNY 14,500-16,800/ton	CNY 18,200-20,500/ton	+22%
Fluff Pulp (Bleached Softwood)	USD 860-980/ton	USD 1,020-1,150/ton	+18%

Sources: Sunsirs (Dec 2025 acrylic acid & SAP), Longzhong Information (Q4 2025), Argus Media (Dec 2025 pulp), logistics freight estimates

Trade & Macro Indicators

Uzbekistan's 2025 GDP growth is estimated at approximately **5.6%**, with population surpassing **37 million** and a high proportion of young people. China-Uzbekistan bilateral trade reached **USD 14 billion** in 2024, and hygiene raw materials benefit from Central Asia FTA preferential tariff rates. Uzbekistan is advancing its WTO accession process.

- Uzbekistan 2025 GDP growth: **5.6%** (World Bank forecast), inflation approx. 8.2%
- China-Uzbekistan bilateral trade 2024: **USD 14 billion**, YoY +11%
- USD/UZS exchange rate (Dec 2025): approx. **1:12,650**
- Hygiene raw material import tariff: **0-5%** (Central Asia FTA preferential rate)

Sources: World Bank (Oct 2025 Uzbekistan Economic Outlook), Ministry of Commerce of China (Jan 2025), Central Bank of Uzbekistan (Dec 2025 exchange rate)

▢ Risks & Opportunity Windows

⚠ Key Risks : The Uzbekistan Som exchange rate is volatile (depreciated approx. 7% in 2024), potentially eroding import margins; Uzbekistan is promoting a raw material localization strategy, planning to build a SAP pilot production line. Opportunity Windows: Diaper penetration has up to 30 percentage points of upside; Chinese raw materials have a significant cost advantage; the Belt and Road logistics corridors continue to improve.

- Risk Uzbekistan localization policy: 5% additional tariff on SAP imports proposed for 2026 (draft stage)
- Risk Som annual exchange rate fluctuation range of 8-12%; recommend USD settlement or hedging
- Opportunity China-Kyrgyzstan-Uzbekistan railway advancing in 2026; future logistics costs may drop 15-20%
- Opportunity Uzbekistan adult incontinence market growing 25% annually; strong premium SAP demand growth

Sources: Ministry of Investment and Foreign Trade of Uzbekistan (Jan 2026 policy draft), Asian Development Bank (Sep 2025 Central Asia infrastructure report), industry research

▯ Data Source Summary (at least 6 independent verifiable sources)

1. General Administration of Customs of China — 2024 China SAP & nonwoven export data (Jan 2025)
2. UN COMTRADE — Uzbekistan hygiene raw material import classification data (updated Mar 2025)
3. Sunsirs — SAP & acrylic acid China market price monitor (Dec 2025)
4. Longzhong Information — Acrylic acid industry chain & SAP operating rate data (Q4 2025)
5. Zhuochuang Information — PP spunbond nonwoven industry survey (Nov 2025)
6. World Bank — Uzbekistan 2025 Economic Outlook (Oct 2025)
7. Argus Media — Fluff pulp & chemicals international prices (Dec 2025)
8. Euromonitor — Central Asia hygiene product market report (Jun 2025)
9. State Statistics Committee of Uzbekistan — 2024 industry & trade data (Feb 2025)
10. Ministry of Commerce of China — China-Uzbekistan bilateral trade statistics (Jan 2025)