



Ministry of Agriculture  
of the Republic of Uzbekistan

# AGRI-FOOD INDUSTRY OF UZBEKISTAN

# UZBEKISTAN

## AT A GLANCE

### AREA



**448 970** KM<sup>2</sup>

### POPULATION



**37,5** MILLION

### GDP



**115** BILLION DOLLARS

INDUSTRY – 26,4%

CONSTRUCTION – 7,0%

SERVICES – 47,4%

**AGRICULTURE – 19,2%**

### AGRICULTURAL LAND

**26,1** MILLION HA

### IRRIGATED LAND

**4,2** MILLION HA

### PASTURELAND

**16,7** MILLION HA

### OTHER LAND TYPES

**5,2** MILLION HA

(CROP LANDS, PERENNIAL TREES, BARREN LANDS, GARDEN LANDS, FORESTS, SHRUBLANDS)



### MAIN CULTIVATED CROPS IN 2024



#### COTTON

**1** M HA



#### WHEAT

**1** M HA



#### RICE

**139** K. HA



#### ORCHARDS

**358** K. HA



#### VINEYARD

**196** K. HA

# HORTICULTURE SECTOR

✓ Horticulture accounts for approximately **40%** of total **agricultural output** and employs a large portion of the **rural population**.

## GLOBAL EXPORT COMMODITIES



**CHERRY**  
4<sup>th</sup> place



**TABLE GRAPE**  
10<sup>th</sup> place



**PLUM**  
7<sup>th</sup> place



**APPRICOT**  
4<sup>th</sup> place



**PEACHES**  
7<sup>th</sup> place



**PERSIMMON**  
3<sup>th</sup> place



# LIVESTOCK SECTOR

## LIVESTOCK PRODUCTION



## IMPORT OF LIVESTOCK PRODUCTS



## FEED PRODUCTION



In livestock farms, **543 hydroponic** units have been established, producing **20,000** tons of **green fodder** annually."

# LOGISTICAL CAPACITY AND INFRASTRUCTURE



## Current Logistical Capacity

|                        |                              |  |
|------------------------|------------------------------|--|
| <b>TOTAL:</b>          |                              |  |
|                        | <b>UNITS</b><br><b>2 142</b> | <b>CAPACITY</b><br><b>2,633</b><br>thousand tons |
| <b>FREEZE STORAGES</b> |                              |  |
|                        | <b>UNITS</b><br><b>2054</b>  | <b>CAPACITY</b><br><b>1,336</b><br>thousand tons |
| <b>AGROLOGISTICS</b>   |                              |  |
|                        | <b>88</b>                    | <b>POWER</b><br><b>1,297</b><br>thousand tons    |



## INITIATIVES

|                              |  |   |
|------------------------------|--|---|
|                              |  |   |
| <b>UNITS</b><br><b>2 228</b> |  | <b>CAPACITY</b><br><b>2 740</b> thousand tons |
| <b>FREEZE STORAGES</b>       |  |   |
| <b>UNITS</b><br><b>2 130</b> |  | <b>CAPACITY</b><br><b>1 383</b> thousand tons |
| <b>AGROLOGISTICS</b>         |  |   |
| <b>UNITS</b><br><b>98</b>    |  | <b>CAPACITY</b><br><b>1 357</b> thousand tons |



# OTHER SUBSECTORS

## COTTON



CULTIVATION  
**1** million hectares

## RICE



CULTIVATION  
**140** million hectares

## WHEAT



CULTIVATION  
**1** million hectares

## FISH



FISHING FARMS  
**6 000**

# AGRI-FOOD EXPORT OUTLOOK

## Annual Growth of Uzbekistan's Agricultural Exports

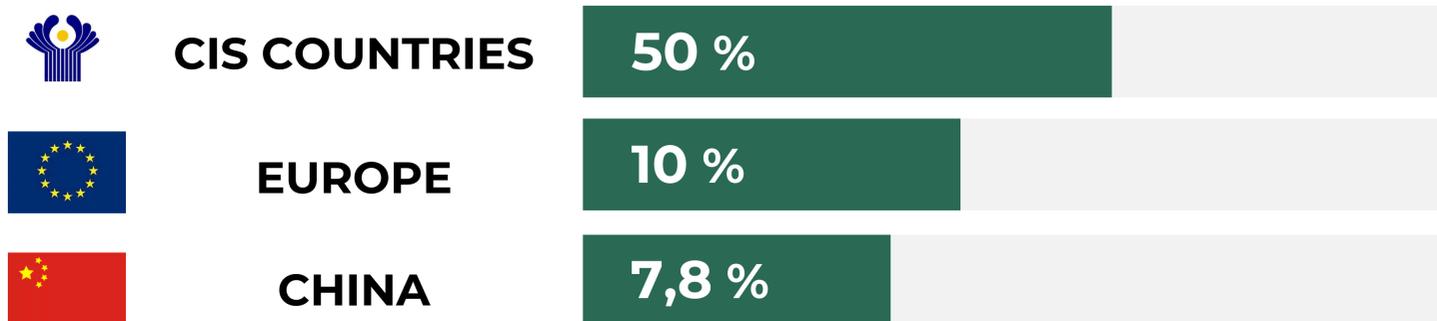


## COMMODITIES EXPORT DATA

|                                | MT<br>(thousand) | AVERAGE PRICE<br>(USD/per ton) |
|--------------------------------|------------------|--------------------------------|
| 1 Raisins                      | 87               | 1 200                          |
| 2 Grape                        | 238              | 700-800                        |
| 3 Beans<br>(except mung beans) | 107              | 600-2 200                      |
| 4 Green mung beans             | 170              | 800                            |
| 5 Nuts                         | 24               | 1 400- 4 100                   |
| 6 Dried product                | 120              | 800-3 900                      |



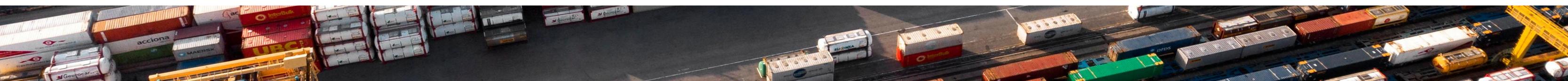
## MAIN EXPORT MARKETS



## Recent Developments / Trends

- ✓ **New trade corridors**
- ✓ **Growing interest from Gulf countries and East Asia**
- ✓ **EU GSP+ status helping access European markets**

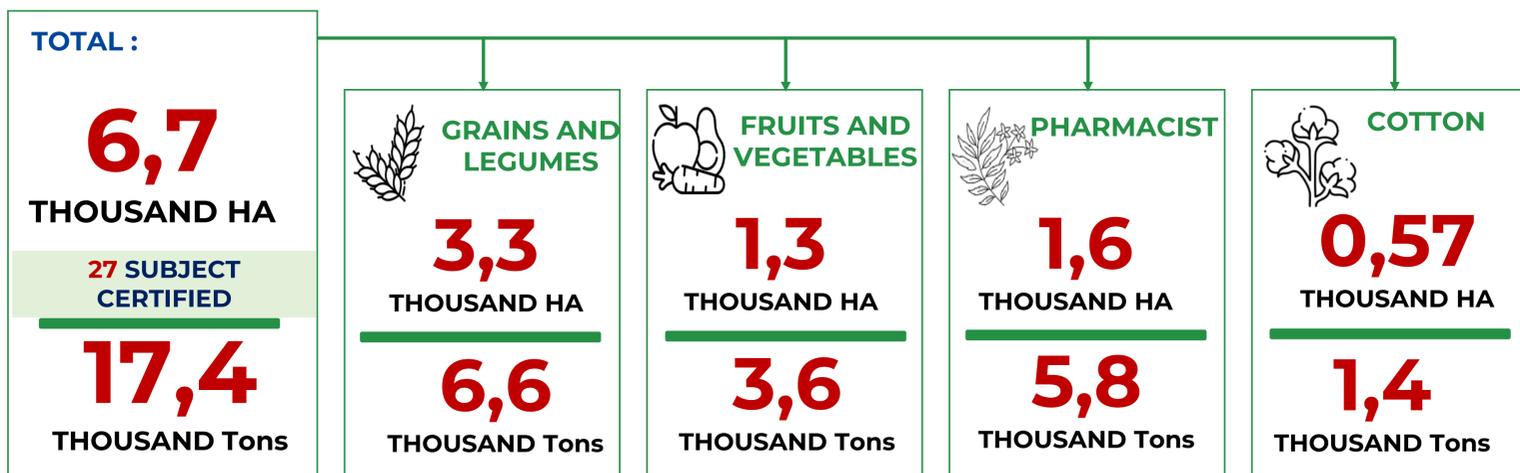
• Over five years of continuous improvements, the export reach has **expanded** to **18 countries**, (Serbia, Kenya, Syria, Albania, Costa Rica, Palau, Barbados, Switzerland, Mauritania, Lebanon, the Maldives, Bangladesh, Cyprus, Zambia, Nigeria, Nepal, Thailand, and Ecuador).



# ORGANIC



The production of **organic** products is regulated by the Law "On **Organic Products**" (25.04.2022, No. ZUR-766), **Presidential Decree No. PF-5995** (18.05.2020), and **3 Government Resolutions** (18.11.2020, No. 729, 22.01.2021, No. 33, and 23.02.2021, No. 96).



By the end of the year, 3.3 thousand hectares of land will be certified, bringing the total to 10 thousand hectares.



**6.3 THOUSAND HA** of land in **12** districts specialized in growing organic products is currently in the "transition period"



- National certification body **ACS BIO CERTIFICATION MMC LLC** was established in Samarkand.
- 25** experts in the field were trained, consultants and inspectors were trained.

## 11 Conformity Assessment Bodies

**Ecocert**  
(France)



**Control Union**  
(Holland)



**ACS BIO CERTIFICATION MMC**  
(Uzbekistan)



**"Sertifikācijas Un Testēšanas Centrs" (STS)**  
(Latvia)



**Cert International**  
(Slovakia)



**SCS Global Services**  
(USA)



**Bureau Veritas**  
(France)



**"Atyab International Services"**  
(Oman)



**"Turkcert Belgelendirme Hizmetleri"**  
(Turkey)



**Kiwa BCS Öko-Garantie GmbH**  
(Germany)



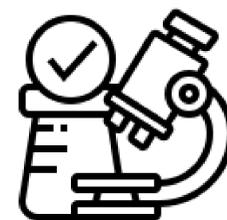
**bio.inspecta AG**  
(Switzerland)



**"Global Export Company" LLC** grows organic mash, beans, and peanuts on **480 hectares** around the Kattakurgan and Chimkurgan reservoirs.



In the Nukus district, the **BIOGUMUS** farm grows organic tomatoes on **50 hectares** of land, dries them, and exports them to Europe for \$6;



The Agro Food Techno Center complex laboratory was launched in Yukhori Chirchik and the **Agrolab** complex center laboratory was launched in Yangiyul.

# GEOINFORMATION SYSTEM OF THE MINISTRY OF AGRICULTURE

## Project goal



Formation of an electronic database on the area of agricultural land, the condition of crops and necessary infrastructure facilities.

## Project Purpose

- Continuous inventory and monitoring of 4 million hectares of crop land, and then 24 million hectares of all agricultural land;
- Providing useful information to farmers and other agricultural producers;
- Specify soil quality and nutrient percentage;
- Organization of irrigation works;
- Weather and harvest forecast;
- Optimization of logistics routes to processing and storage facilities.



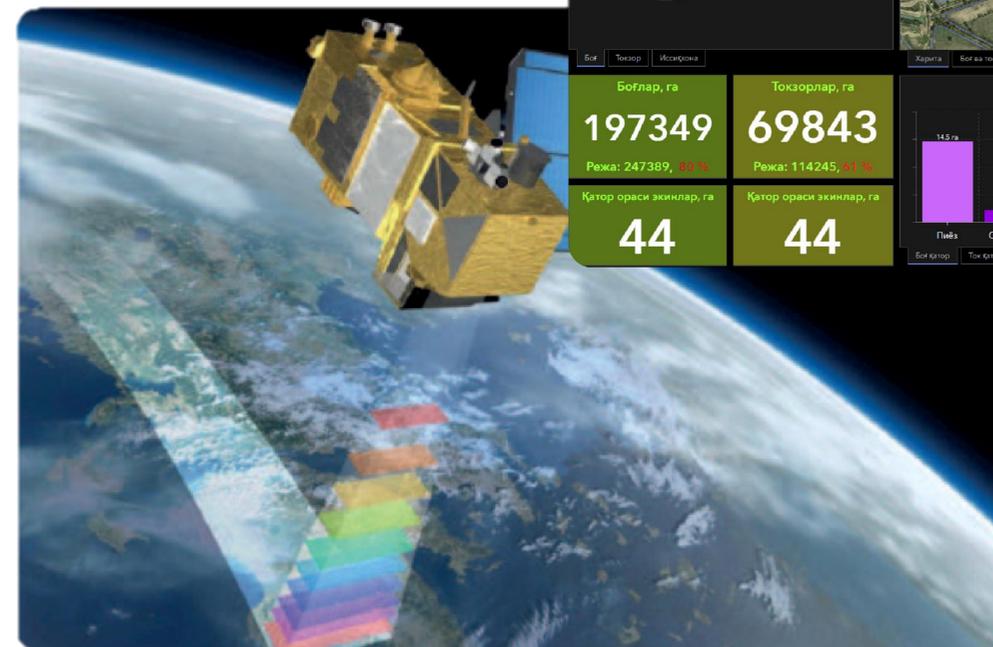
**SOURCES OF FUNDING**  
The European Union and the World Bank



**LOCATION OF PROJECT IMPLEMENTATION**  
Across the territory of Uzbekistan



**ArcGIS**



|                      | INVESTMENT AMOUNT       | EXEMPTION PERIOD  |  |
|----------------------|-------------------------|---|--|
| ENTERPRISES WITH FDI | 0,3 MILLION – 3 MILLION |  <b>3 YEAR</b>   | <p><b>TAX EXEMPTION FROM:</b></p> <ul style="list-style-type: none"> <li>▶ Income tax</li> <li>▶ Property tax</li> <li>▶ Single tax payment for small enterprises</li> </ul>   |
|                      | 3 MILLION – 10 MILLION  |  <b>5 YEAR</b>   | <p><b>2 YEARS CUSTOMS DUTY EXEMPTION</b></p> <ul style="list-style-type: none"> <li>▶ Of own use property import for enterprises with at least <b>33%</b> of foreign investments</li> </ul>  |
|                      | MORE THAN 10 MILLION    |  <b>7 YEAR</b> | <p><b>22 SECTORS OF THE ECONOMY THAT ARE SUBJECT TO BENEFITS</b></p> <p> Benefits are available in all regions except <b>Tashkent city</b> and <b>Tashkent region</b></p> |

VALUE-ADDED TAX



CORPORATE INCOME TAX



PERSONAL INCOME TAX



NOT LESS THAN

**15 %**

Should be the share of foreign investors in JSC and at least 33% in other cases



INVESTMENT LESS THAN - 10 million dollars



INVESTMENT EXCEEDS - 10 million dollars

IDENTIFY AVAILABLE  
LAND PLOTS THROUGH



WWW.E-AUKSION.UZ



BID FOR  
THE PLOT



EITHER  
COMPLETE REGISTRATION  
AT MY.GOV.UZ

OR  
ADDRESS THE MINISTRY

- ▶ Business plan
- ▶ Project teaser
- ▶ project concept with proposed location



SUBMIT PAPERS AND WORK  
WITH MINISTRY TEAM



START THE PROJECT

## BUKHARA REGION

CREATION OF THE "AGRO-INDUSTRIAL CLUSTER" (INDUSTRIAL HEMP CLUSTER)



### AVERAGE ANNUAL PRODUCTION

- ▶ Fiber – **12 000 tons**
- ▶ Seed – **12 000 tons**
- ▶ Oil – **800 tons**



### PAYBACK PERIOD

**5 YEARS**



### PROJECT ECONOMIC INDICATORS

**IRR 111%**



## TASHKENT REGION

CULTIVATION OF NEW TYPES OF HERBAL PLANTS IN UZBEKISTAN



### AVERAGE ANNUAL PRODUCTION

- ▶ Production and machinery land - **1 ha**
- ▶ Modern greenhouse for saplings - **2 ha**
- ▶ Plantation - **330 ha**



### PAYBACK PERIOD

**2 YEARS**



### PROJECT ECONOMIC INDICATORS

**IRR 17%**



## JIZZAKH REGION

STURGEON FISH BREEDING AND CAVIAR PRODUCTION



### AVERAGE ANNUAL PRODUCTION

- ▶ **45 tons** of black caviar/year
- ▶ **1 200 tons** of fish for meat/year



### PAYBACK PERIOD

**6 YEARS**



### PROJECT ECONOMIC INDICATORS

**IRR 19,6%**



## SAMARKAND REGION

CREATION OF AN AGROLOGISTIC CENTER WITH A COLD STORE



### AVERAGE ANNUAL PRODUCTION

- ▶ **59 hectares**



### PAYBACK PERIOD

**3 YEARS**



### PROJECT ECONOMIC INDICATORS

**IRR 31%**



## TASHKENT REGION

PRODUCTION OF CONFECTIONERY PRODUCTS AND PROCESSING COCOA BEANS



**AVERAGE ANNUAL PRODUCTION**

▶ 10 000 tons



**PAYBACK PERIOD**

**5 YEARS**



**PROJECT ECONOMIC INDICATORS**

**IRR 29%**



## TASHKENT REGION

FREEZE-DRYING AND PACKAGING OF FRUITS



**AVERAGE ANNUAL PRODUCTION**

▶ 15 000 tons per year



**PAYBACK PERIOD**

**7 YEARS**



**PROJECT ECONOMIC INDICATORS**

**IRR 20%**



## NAMANGAN REGION

GROWING WATERMELONS AND MELONS IN GREENHOUSES ALL YEAR ROUND



**AVERAGE ANNUAL PRODUCTION**

▶ 9 mln jars



**PAYBACK PERIOD**

**6 YEARS**



**PROJECT ECONOMIC INDICATORS**

**IRR 42%**



## KHOREZM REGION

CREATION OF INTENSIVE FRUIT GARDENS IN 1000 HA



**AVERAGE ANNUAL PRODUCTION**

▶ 39 200 tons of fruits/year



**PAYBACK PERIOD**

**4 YEARS**



**PROJECT ECONOMIC INDICATORS**

**IRR 60%**

