

Uzbekistan: Central Asia's Fastest-Growing Consumer Market

A young, expanding population with rising incomes - and a rapidly modernizing route to market.

Macroeconomy

5.9%

Projected GDP growth in 2025 - outpacing Kazakhstan (**4.9%**), Turkey (**2.7%**), Russia (**1.5%**) and the EU (**0.8%**)

37.7M

Population in 2025, growing to **41.8M by 2030**

+17.2%

Growth in average salary vs H1 2024 - now **6 million soums/month**

40%

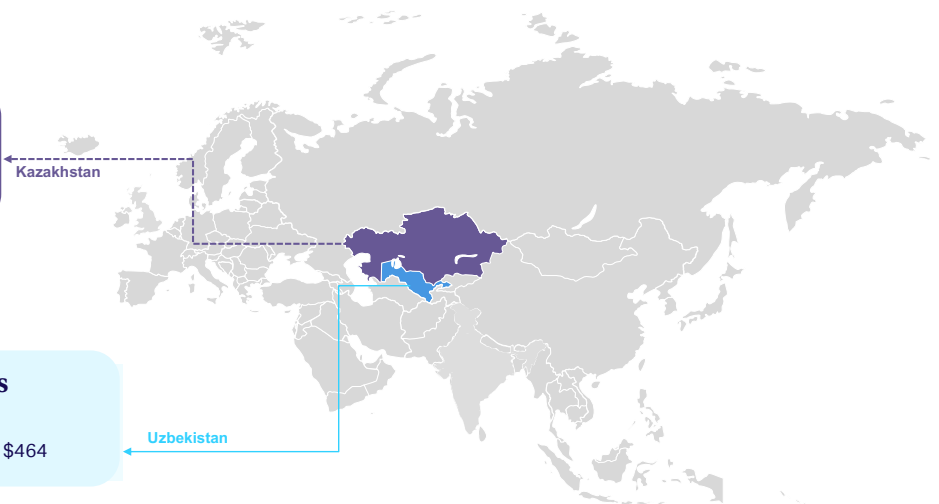
Share of household income spent on FMCG - among the highest in the region

50% spent on FMCG goods

Avg age - 32, Avg hh size - 4
GDP per capita - \$11850 Avg Salary - \$860

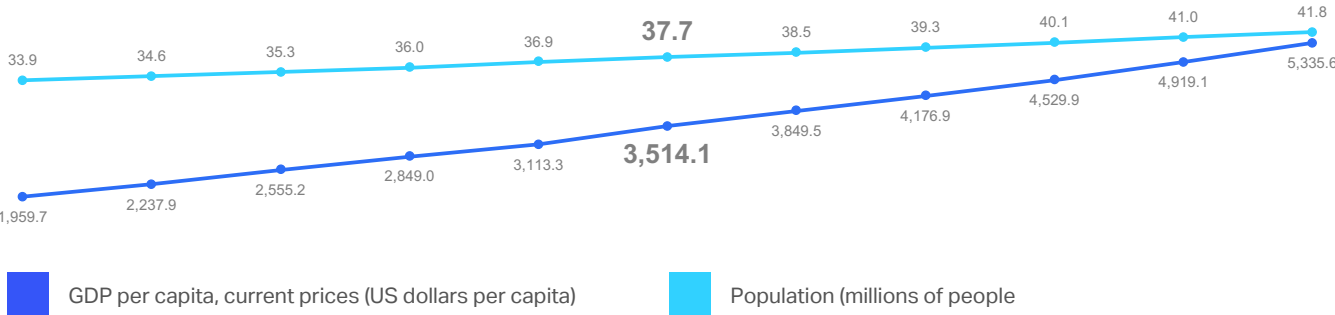
40% spent on FMCG goods

Avg age - 32 Avg hh size - 5
GDP per capita - \$3890 Avg Salary - \$464



A young, spending-ready consumer base

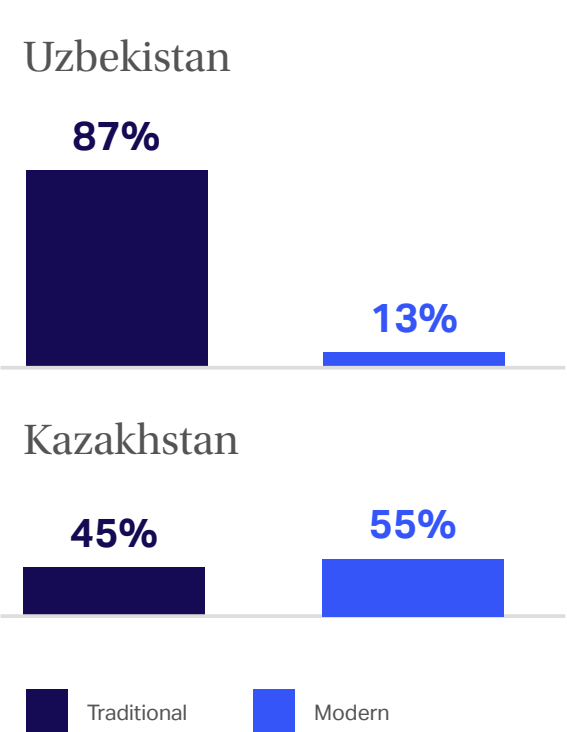
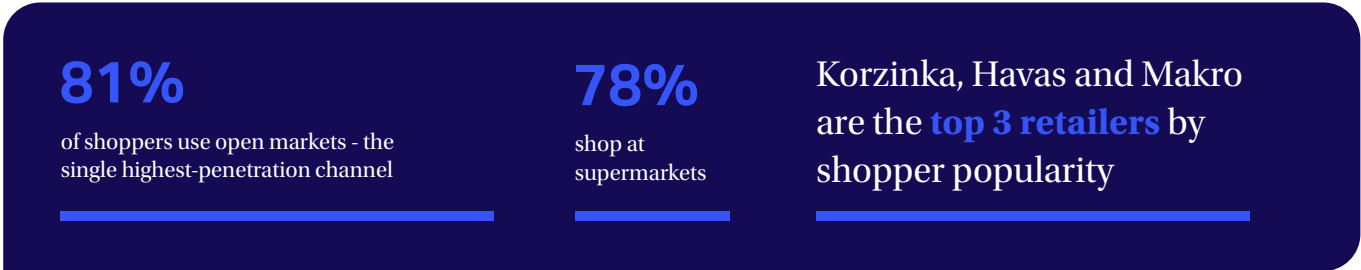
Uzbekistan’s population skews young - **average age 28**, with an **average household size of 5** - creating a large, multi-generational consumption unit per home. GDP per capita has grown from **\$1,960 in 2020 to \$3,514 in 2025**, and is forecast to reach **\$4,919 by 2029**. Real income per capita is climbing **7.4%** even as inflation cools from **8.8% (2025)** toward **5% by 2029** — putting more real spending power in consumers’ hands, including for discretionary and premium beverage purchases.



Retail is still wide open - and that’s the opportunity

Modern Trade is in its infancy: just **13% of sales** run through Modern Trade in Uzbekistan, versus **55% in Kazakhstan**. Traditional Trade - small stores, open markets, kiosks - still commands **87%** of the market.

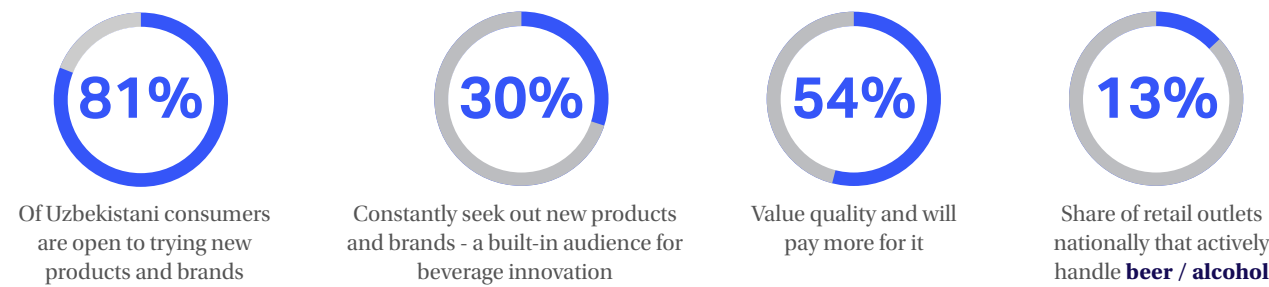
Across the six census cities (Tashkent, Samarkand, Andijan, Fergana, Kokand, Namangan), NIQ has already mapped **14,803 stores**, including **727 dedicated alcohol stores**.



What it means for beverages & beverage alcohol

Thirsty for Growth: The Beverage & Alcohol Opportunity in Uzbekistan

Curious, quality-driven consumers meet a fragmented but mappable retail landscape.



Where beer & alcohol actually live on shelf

Beverage alcohol in Uzbekistan is a **specialist-channel category**. Alcohol specialist stores handle beer and alcohol at near-universal rates (**85–100%** across the six census cities), while general grocery - Small, Medium and even Large-format stores - carry it far less consistently, typically in the **single digits to low double digits**. Consumer behavior confirms this channel split: shoppers say **cigarettes, beer and spirits are the categories most associated with specialty stores**, distinct from the fresh-food-led open markets and the bread-and-basics traditional grocery trip.

City-level nuance (beer handling, non-specialist outlets):

Samarkand stands out as the most beer-friendly general-retail market: **22–44%** of Hyper/Supermarkets, Large and Medium stores handle beer — far above Andijan, Fergana, Namangan, Kokand and Tashkent, where handling in those same formats is mostly **0–8%**.

This signals Samarkand as a potential lead market for beer distribution expansion beyond specialist stores.

The consumer behind the glass

Uzbekistani shoppers are experimental and increasingly discerning.



Over half say they’re willing to pay a premium for quality - a favorable backdrop for **premiumization and new-brand entry** in beer, spirits, and adjacent beverage categories.



Did you know?

- Open markets are visited for **regular pantry restocking**
- Specialty stores (where alcohol concentrates) are visited for **special occasions** - a cue for occasion-based marketing and merchandising
- Traditional grocery stores are the **urgent need** channel



The data is catching up to the opportunity

Until now, brands have operated with limited visibility into this market. **NIQ's Census and RMS coverage** - launched across 6 cities and scaling to **13+ cities and ~94% of urban purchase power by 2028** - will give beverage and beverage alcohol players a granular, ongoing read on distribution, pricing, and share by store format and city, including dedicated alcohol-store coverage.

From 5.4M to 11.2M+ people in reporting scope by 2027, Uzbekistan's beverage market is measurable, and it's growing fast.

Ready to grow?



Bilal Habib

Vice President - Global Clients
bilal.habib@nielseniq.com



Ilona Lepp

Market Leader
Ilona.Lepp@nielseniq.com