Staple Foods in Uzbekistan

December 2025

Table of Contents

Staple Foods in Uzbekistan

EXECUTIVE SUMMARY

Staple foods continues to perform positively in 2025

KEY DATA FINDINGS

INDUSTRY PERFORMANCE

Multiple factors help to mitigate upward pressure on unit prices

Increasing desire for convenience is a key demand driver in several categories

WHAT'S NEXT?

Staple foods retains solid prospects for further growth

Health concerns will gradually gain influence over purchasing decisions

COMPETITIVE LANDSCAPE

Brotmeister Nonash ZAO remains the overall leader in staple foods

Braibanti Technology OOO is the most dynamic company in value growth terms

CHANNELS

Small local grocers channel continues to dominate staple foods distribution

E-commerce channel records the fastest growth in value sales

MARKET DATA

Table 1 - Sales of Staple Foods by Category: Volume 2020-2025

Table 2 - Sales of Staple Foods by Category: Value 2020-2025

Table 3 - Sales of Staple Foods by Category: % Volume Growth 2020-2025

Table 4 - Sales of Staple Foods by Category: % Value Growth 2020-2025

Table 5 - NBO Company Shares of Staple Foods: % Value 2021-2025

Table 6 - LBN Brand Shares of Staple Foods: % Value 2022-2025

Table 7 - Penetration of Private Label by Category: % Value 2021-2025

Table 8 - Distribution of Staple Foods by Format: % Value 2020-2025

Table 9 - Forecast Sales of Staple Foods by Category: Volume 2025-2030

Table 10 - Forecast Sales of Staple Foods by Category: Value 2025-2030

Table 11 - Forecast Sales of Staple Foods by Category: % Volume Growth 2025-2030

Table 12 - Forecast Sales of Staple Foods by Category: % Value Growth 2025-2030

COUNTRY REPORTS DISCLAIMER

SOURCES

Summary 1 - Research Sources

Baked Goods in Uzbekistan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Overall demand remains solid despite continued price hikes

INDUSTRY PERFORMANCE

Unpackaged leavened bread and unpackaged flat bread are the best performers

Packaged bread, cakes and pastries continue to gain popularity

WHAT'S NEXT?

Stable growth in retail volume and current value sales projected

Health concerns will continue to have limited influence in purchasing decisions

Increased domestic wheat and flour production should support greater price stability

COMPETITIVE LANDSCAPE

Brotmeister Nonash ZAO retains the overall lead in baked goods

Zoir ChP is the most dynamic company in value growth terms

CHANNELS

Baked goods distribution still heavily concentrated in small local grocers

E-commerce is the most dynamic channel in 2025

CATEGORY DATA

COUNTRY REPORTS DISCLAIMER

Breakfast Cereals in Uzbekistan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Demand for breakfast cereals remains buoyant

INDUSTRY PERFORMANCE

Children's breakfast cereals shows the fastest development

Rising health awareness boosts muesli and granola consumption

WHAT’S NEXT?

Breakfast cereals sales set to increase steadily in volume and value terms

Hot cereals expected to be the best performing category

COMPETITIVE LANDSCAPE

Cereal Partners Worldwide maintains commanding overall lead

Resurs OOO is the most dynamic performer in value growth terms

CHANNELS

Small local grocers remains the dominant distribution channel

E-commerce is the fastest growing channel

CATEGORY DATA

INDUSTRY PERFORMANCE

Chilled processed red meat is the strongest performer

Interest in processed seafood products remains low

WHAT'S NEXT?

Outlook remains broadly favourable

Health concerns will continue to shape consumer choices and innovation

Efforts to tackle counterfeit sales likely to intensify in chilled processed meat

COMPETITIVE LANDSCAPE

Vichiunai RUS OOO remains the leading player

Sharshara MChJ is the best performing company in value growth terms

CHANNELS

Small local grocers channel continues to dominate distribution

E-commerce sales continue to grow rapidly from a low base

CATEGORY DATA

COUNTRY REPORTS DISCLAIMER

Rice, Pasta and Noodles in Uzbekistan

KEY DATA FINDINGS

2025 DEVELOPMENTS

Population growth and traditional dietary habits support stable demand

INDUSTRY PERFORMANCE

Instant noodle pouches is the fastest growing category

Pricing pressures recede in rice

WHAT'S NEXT?

Overall demand set to increase steadily

Health-oriented products expected to become more popular

Efforts to boost domestic supply should facilitate greater price stability in rice

COMPETITIVE LANDSCAPE

Mareven Food Central OOO strengthens its overall lead

Barilla GeR Flli SpA is the most dynamic performer in value growth terms

CHANNELS

CATEGORY DATA

COUNTRY REPORTS DISCLAIMER