



Baked Goods in Uzbekistan

December 2025

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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

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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

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