



INVESTMENT & TRADE PROFILE

MEDICAL AND PHARMACEUTICAL INDUSTRY



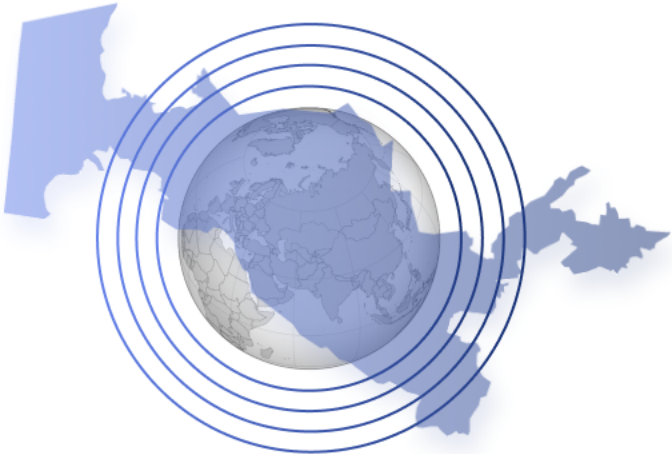
FACTS ABOUT UZBEKISTAN



GDP GROWTH OF 7% ANNUALLY, SIGNALLING A ROBUST ECONOMY



LARGEST CONSUMER MARKET IN CENTRAL ASIA, FORECASTED TO REACH 40 MILLION BY 2030.



STRATEGIC GEOGRAPHICAL LOCATION IN THE MIDDLE OF CENTRAL ASIA

ONE OF THE MOST PROGRESSIVE PHARMACEUTICAL LEGISLATIONS

MARKET OVERVIEW AND LEGISLATIVE FRAMEWORK

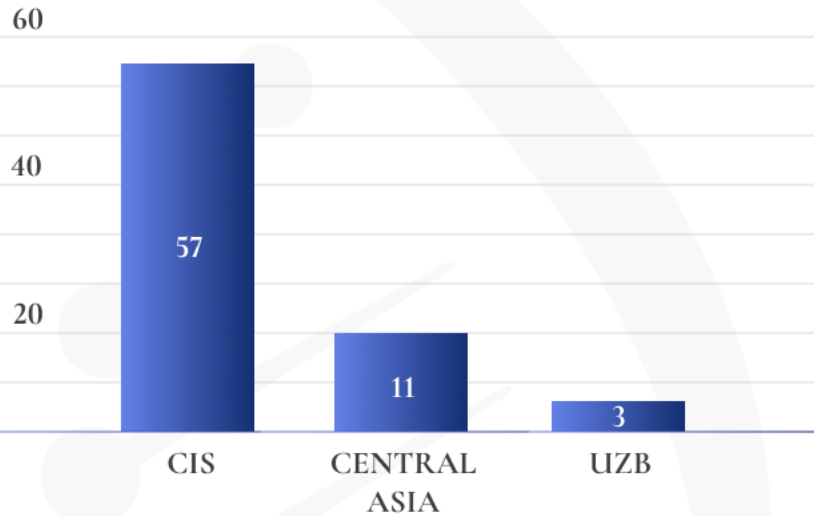


DUTY-FREE ACCESS TO CIS, A MARKET OF OVER 300 MILLION CONSUMERS



CENTRAL ASIAN MARKET

BLN \$



- CHANGES IN REGULATION:
- ★ WHO GBT MATURITY LEVEL ASSESSMENT
 - ★ PIC/S MEMBERSHIP APPLICATION
 - ★ WHO PRE-QUALIFICATION OF LABORATORIES & PRODUCTS

FOREIGN TRADE PERFORMANCE

\$ 3 BILLION IN FOREIGN TRADE TURNOVER



TYPE OF IMPORTED PRODUCTS
4800+

IMPORT ENTITIES
260

REGISTERED LOCAL PRODUCTS
2900+

GMP-CERTIFIED LOCAL COMPANIES
58



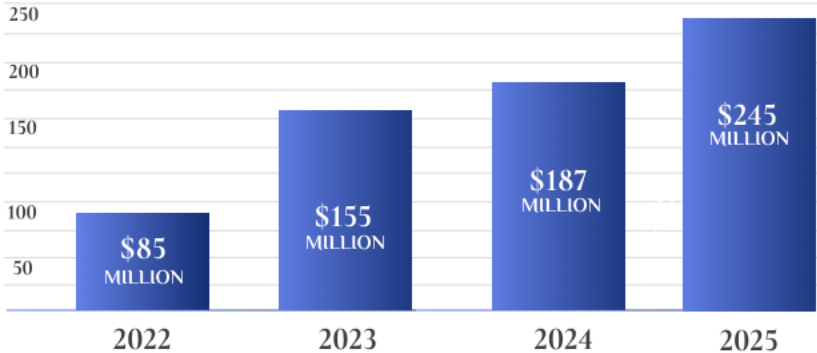
TYPE OF EXPORTED PRODUCTS
1200+

EXPORT ENTITIES
219

ANNUAL EXPORT GROWTH
31%

EXPORT COUNTRIES
55

EXPORT GROWTH DYNAMIC





CLUSTER AND FREE ECONOMIC ZONE ADVANTAGES

BENEFITS

50% reimbursement of registration costs for exporting local manufacturers	100 % reimbursment of First FDA/EMA registration cost	20% government procurement preference. Competitive Pricing Potential
50% reimbursement of EU GMP , US FDA GMP and WHO PQ cost. up to \$ 50 000	50% reimbursement of R&D expenses for product development, up to \$100,000	2 y. loan interest compensation if production is launched within 3 years

EXEMPTIONS

CUSTOM DUTIES + VAT

1 Imported construction materials	3 Imported raw materials or components if the finished goods are exported
2 Imported technological equipment	4 3 years tax exemptions support to non-FEZ residence even.

1 PRICE REGULATION SUPPORT	2 FAST TRACK REGISTRATION FOR LOCAL PRODUCTS SUPPORT	3 82 % DISCOUNT FOR REGISTRATION TO LOCAL MANUFACTURARS .	4 ROYALTY TAX 5%
5 FREE - INTERNATIONAL EXHIBITIONS FOR LOCAL EXPORTERS	6 IMPORTED DRUGS CUSTOMS DUTY 2-5 %	7 200 % REIMBURSTMENT FOR RD COST EXPENSES	

TAX EXEMPTIONS & DURATION SCALE

★ CORPORATE PROFIT TAX ★ LAND TAX ★ PROPERTY TAX ★ WATER TAX

3 \$0,3M – \$3M 3 YEARS	5 \$3M – \$5M 5 YEARS	7 \$5M – \$10M 7 YEARS	10 \$10M + 10 YEARS
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FREE ECONOMIC ZONES + BIO PHARMA CITY .

- ★ LAND PLOTS WITH MARKET VALUE UP TO \$3 MLN OFFERED AT A PREFERENTIAL PRICE OF \$20 000/HA
- ★ VERY LOW LEASE RATES PER HECTARE FOR UP TO 49 YEARS, WITH AN OPTION TO EXTEND
- ★ PROVISION OF ESSENTIAL INFRASTRUCTURE BY THE GOVERNMENT, INCLUDING ROADS, GAS, WATER, SEWERAGE, AND UTILITY NETWORKS



5 REGIONAL FREE ECONOMIC ZONES + BIO PHARMA CITY
FEZS NATIONWIDE



79 ACTIVE COMPANIES



RESOURCE COSTS AND TAX RATE OVERVIEW

COSTS		TAX RATES	
⚡ ELECTRICITY	(\$0.07 PER KWH)	PERSONAL INCOME TAX	12 %
💧 WATER	(\$0.24 PER M³)	CORPORATE PROFIT TAX	15 %
🔥 NATURAL GAS	(\$0.16 PER M³)	VALUE-ADDED TAX	12 %

★ WAGES : AVERAGE \$400-\$500



COSMETICS MARKET OVERVIEW

MARKET SIZE 2025



MARKET SIZE 2030



MARKET GROWTH



IMPORT SHARE



CONSUMER POTENTIAL



60%+

POPULATION UNDER
30 YEARS OLD

Strong demand for beauty and
personal care products

KEY PRODUCT SEGMENTS



SKIN CARE



HAIR CARE



DECORATIVE
COSMETICS



PERFUMES



PERSONAL
CARE

WHY INVEST IN UZBEKISTAN?

- ★ Fast-growing consumer market
- ★ Strategic location for Central Asia
- ★ Government support & customs incentives
- ★ Competitive labor costs
- ★ Access to 120+ million consumers

LOCAL MARKET OPPORTUNITY

BENEFITS

- ★ Import substitution potential
- ★ Growing retail & e-commerce sector
- ★ Expanding beauty service industry
- ★ High demand across all cosmetic categories
- ★ Regional export opportunities

TARGET EXPORT MARKETS



TURKMENISTAN



RUSSIA



AZERBAIJAN



KAZAKHSTAN



KYRGYZSTAN



TAJIKISTAN



AFGHANISTAN



EUROPE



NUTRACEUTICAL INDUSTRY IN UZBEKISTAN

MARKET OVERVIEW

MARKET SIZE (2024)



FORECAST (2030)



GROWTH RATE



IMPORT DEPENDENCY



MAJOR SUPPLIER COUNTRIES



UNITED STATES



GERMANY



INDIA



TURKEY



SOUTH KOREA



CHINA

LOCAL MANUFACTURING SHARE



- Domestic production remains significantly below market demand.
- Strong opportunities exist for import substitution and local manufacturing expansion.

POPULATION



- Increasing health awareness and preventive healthcare culture.
- Rising demand for vitamins, minerals, probiotics, sports nutrition, and wellness products.

GROWING CONSUMER TRENDS



Rapid growth in sports nutrition products.



Increasing consumption of immunity-boosting supplements.



Expanding wellness and healthy lifestyle market.

GOVERNMENT SUPPORT

- ★ Full government support for nutraceutical manufacturers.
- ★ Access to Free Economic Zones (FEZs).
- ★ Tax and customs incentives for investors.
- ★ Infrastructure and investment support programs.
- ★ Export-oriented manufacturing opportunities.
- ★ Internal and Central Asian market analysis.

KEY MARKET INSIGHTS

- ★ The domestic market is heavily dependent on imported nutraceutical and dietary supplement products.
- ★ Strong potential for import substitution and local manufacturing.
- ★ Rising demand across all major product categories.
- ★ Favorable demographics and increasing health awareness drive long-term growth.
- ★ Strategic location provides access to regional markets in Central Asia.

TOP PRODUCT CATEGORIES



VITAMINS & MINERALS



PROBIOTICS & DIGESTIVE HEALTH



SPORTS NUTRITION



IMMUNITY SUPPORT



WELLNESS & HERBAL SUPPLEMENTS



BIOPHARMA CITY

60 HA - SMART-BIO CLUSTER

BIOTECHNOLOGY, COSMETICS, AND
PHARMACEUTICAL PROJECTS

TOTAL AREA

📍 290 HA

TOTAL PROJECT COST

\$ 1.6 BILLION

NEW JOBS

👤 11000+

STUDENTS

👤 4000+

11.8 HA

SOCIAL
INFRASTRUCTURE

\$ 200 MLN.

19.5 HA

TECHNOPARK

PROJECTS

\$ 388 MLN

📈 7

85 HA+100 HA

INDUSTRIAL ZONE

INVESTMENT PROJECTS

\$ 981,4 MLN

📈 32





TECHNOPARK



ADMINISTRATIVE CENTER

\$ \$38 MLN



PHARMACEUTICAL TECHNICAL UNIVERSITY

\$ \$83.7 MLN

2026



R&D CENTER

\$ \$37 MLN

2026

TECHNOPARK PROJECTS

7

COST OF PROJECTS

\$ 388 MILLION

WORKPLACES

3000+

IMPLEMENTATION PERIOD

2024 - 2027

AREA

19.5 HA

STUDENTS

4000+



GENOME AND BIOTECHNOLOGY RESEARCH CENTER

\$ \$80 MLN

2027



CLINICAL RESEARCH CENTER

\$ \$105 MLN

2027



PHARMACEUTICAL SAFETY CENTER LABORATORY

\$ \$21 MLN

2025



VIVARIUM

\$ \$23 MLN

2025



LAUNCHED PROJECTS

INVESTMENT AMOUNT



\$981,4 MLN

WORKPLACES



8150

LAND AREA



85 HA

2021 - 2023

HAEMATECH



700 JOBS

2024 - 2026

WORLD MEDICINE ASIA



200 JOBS

2024 - 2026

KUSUM UZBEKISTAN



210 JOBS

2024 - 2027

LAFZ



81 JOBS

2024 - 2025

MASMED PHARM IMPEX



160 JOBS

2024 - 2027

DENTALS PHARMA MARKET



21 JOBS

2024 - 2025

GRAND PHARM LOGISTICS HUB



325 JOBS

2024

2024

BIO MEDI PHARM



500 JOBS

2024 - 2025

DR. AZIZOV PHARM



50 JOBS

2025 - 2029

K-PHARMA



500 JOBS

2024 - 2027

GRANDENE



300 JOBS

2024 - 2028

SERENE



300 JOBS

2024 - 2028

ELASTIC MEDICAL TEX



70 JOBS

2025 - 2028

RADIKS



400 JOBS

2024 - 2025

DORA LINE



300 JOBS

2024 - 2025

REMEDY GROUP



300 JOBS

2024 - 2025

ONCOWELL



300 JOBS

2025 - 2028

NOYA CA



50 JOBS

2024 - 2026

MEDTRADE



600 JOBS

2025 - 2028

OZWELL BIOPHARM



400 JOBS

2024 - 2026



LAUNCHED PROJECTS

INVESTMENT AMOUNT



\$981,4 MLN

WORKPLACES



8150

LAND AREA



85 HA

2025

UNIONPHARM



350 JOBS

2025 - 2027

NEST-MED-TECH



40 JOBS

2025 - 2026

NURIN PHARMA



145 JOBS

2026-2028

UNIMED



300 JOBS

2025 - 2027

PHARMGROUP ED



270 JOBS

2025 - 2027

SCHAEFFER PHARMA



60 JOBS

2026 - 2028

CELL MEDICINE



25 JOBS

2025 - 2027

REMEDY



150 JOBS

2025 - 2027

SHAYANA PHARMACEUTICAL



350 JOBS

2026 - 2034

BATTAL HOLDING



300 JOBS

2025 - 2028

ANANTA MEDICARE



250 JOBS

2026 - 2031

AVANTIKA



150 JOBS

2026 - 2029



THANK YOU!



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