



FITNESS

2025 CENTRAL ASIA

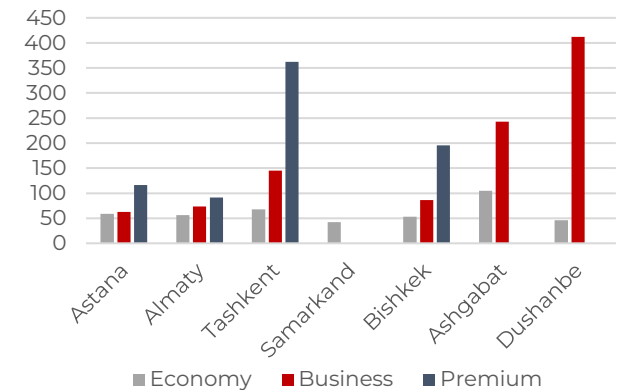
Central Asia represents a region with a rapidly developing fitness industry. Currently, there are 210 high-quality fitness facilities operating across the region. The total area of quality fitness clubs in Central Asia amounts to approximately 305,556 m², with Kazakhstan accounting for 58%, Uzbekistan — 20%, Tajikistan and Kyrgyzstan — 9% each, and Turkmenistan — 3%.

When examining the ratio of total gym area per city to population size, it becomes clear that Astana has the highest gym space per capita, with 0.037 m² per person, while the lowest levels are observed in Samarkand (0.007 m² per person) and Ashgabat (0.010 m² per person).

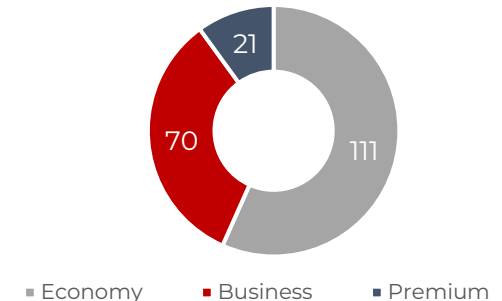
Economy-class gyms dominate the market, making up 56.9% of all facilities. Notably, premium-class fitness clubs—which provide a comprehensive range of services—still maintain a strong presence (10%), despite the region's relatively low average income of \$480.6.

An analysis of pricing reveals that in cities such as Bishkek, Ashgabat, and Dushanbe, membership fees are significantly higher than in major cities of Kazakhstan and Uzbekistan. At the same time, gyms in these cities often lag behind in terms of equipment and the range of services offered. We assume this is due to a combination of limited supply and the relatively low popularity of fitness among the local population.

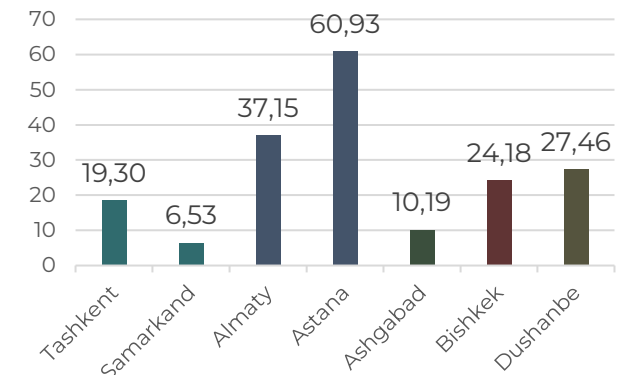
AVERAGE PRICES BY CATEGORY IN THE REGION, \$



FITNESS CLUB SEGMENTATION BY CLASS, UNITS



PROVISION BY CITY, M² PER 1,000 PEOPLE



Source: CMWP

UZBEKISTAN

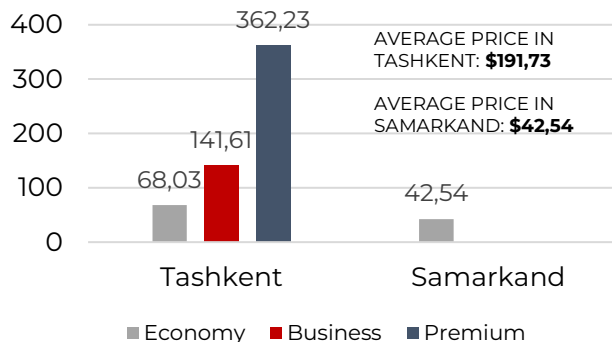


BEFIT SKY. PREMIUM / TASHKENT

FITNESS FACILITY EQUIPMENT

Services	Amount	Share
Fitness Bars	33	63%
Group training studios	32	62%
Swimming pools	12	24%
Martial arts zones	27	53%
Saunas/hammams	26	50%
Spa areas	19	37%

AVERAGE MONTHLY MEMBERSHIP PRICE BY SEGMENT, \$



Source: CMWP

IQ Fitness/ Tashkent 2025 / CMWP

In Uzbekistan, the supply includes 53 high-quality fitness clubs with a total area of approximately 62,526 m². Of this, 14,405 m² belong to Premium-class gyms, 30,662 m² to Business-class, and 17,459 m² to Economy-class facilities. Notably, 58,703 m² of the total area is located in Tashkent.

Even though Uzbekistan accounts for 20% of the total regional supply, the availability of fitness facilities in its two largest cities is among the lowest in Central Asia. In Tashkent, fitness space availability stands at 19.30 m² per 1,000 people, while in Samarkand — the third-largest city in Uzbekistan — it is only 6.53 m² per 1,000 people, the lowest figure in the region.

In Uzbekistan, there is currently only one fitness chain, which operates exclusively in Tashkent and Samarkand.

There are seven chain brands represented in Tashkent, with the largest being Ozone, Chekhov, and BeFit. At this stage, franchising in the fitness industry remains relatively uncommon—in contrast to Kazakhstan, where it is more established.

Sports clubs are predominantly equipped with martial arts areas (52% of gyms) and rooms for group classes (62%). Saunas and hammams are also relatively popular in Uzbekistan (50%).

The online presence in the country is relatively developed: almost every gym has its own social media pages, however, websites are less popular.

TASHKENT

~\$362,2/month

Premium

~\$68/month

Economy

47

Number of gyms in the city

SAMARKAND

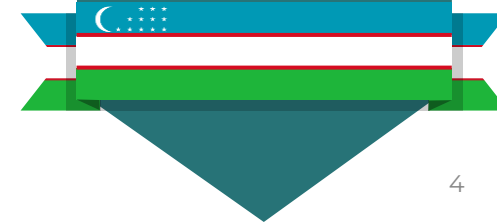
~\$42,5/month

Economy

6

Number of gyms in the city

*prices are calculated based on semi-annual and annual memberships



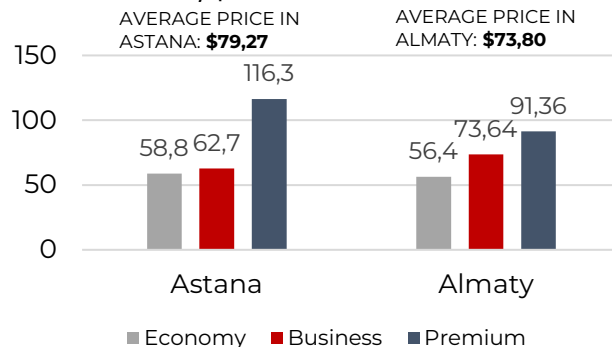


INVICTUS FITNESS SADU. PREMIUM / ALMATY

FITNESS FACILITY EQUIPMENT

Services	Amount	Share
Fitness Bars	74	70%
Group training studios	49	47%
Swimming pools	11	10%
Martial arts zones	17	16%
Saunas/hammams	51	49%
Spa areas	27	26%

AVERAGE MONTHLY MEMBERSHIP PRICE BY SEGMENT, \$



Source: CMWP

Across Central Asia, Kazakhstan leads in terms of fitness center availability per capita and the total number of facilities (105 units). The total area of quality fitness spaces on the market amounts to 176,816 m².

The availability in Almaty is 37.15 m² per 1,000 people, and in Astana, it is 60.93 m² per 1,000 people. These are the highest figures in Central Asia.

The Kazakhstan market differs from others in the region by having a large number of chain gyms offering franchising opportunities. Also, due to high competition, the fitness services market is characterized by low membership prices and offers one of the most affordable pricing policies in the region: the approximate monthly membership cost is \$57.60 for Economy-class gyms, \$68.17 for Business-class gyms, and \$103.83 for Premium-class gyms.

This may be due to the fact that large chain players focus on the mass market by creating more affordable gyms with minimal operating costs. For the same reason, gyms in Kazakhstan cannot be considered fully equipped, as nearly half of them lack additional facilities beyond fitness bars.

High competition also encourages brands to actively develop their digital presence. As a result, most fitness centers in the country have professionally designed websites and social media pages. Additionally, gyms actively use services like 2GIS, Yandex, and Google Maps to increase brand awareness and ease of search. For example, every gym in both cities has an Instagram page, and only 11% do not have their own website.

*prices are calculated based on six-month and annual memberships

ASTANA

~\$116,3/month

Premium

~\$58,8/month

Economy

47

Number of gyms in the city

ALMATY

~\$91,3/month

Premium

~\$56,4/month

Economy

58

Number of gyms in the city



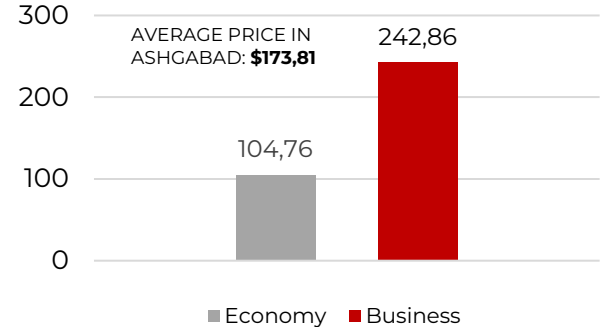


ASHGABAD SPORT. ECONOMY / ASHGABAD

FITNESS FACILITY EQUIPMENT

Services	Amount	Share
Fitness Bars	12	71%
Group training studios	7	41%
Swimming pools	0	0%
Martial arts zones	0	0%
Saunas/hammams	0	0%
Spa areas	0	0%

AVERAGE MONTHLY MEMBERSHIP PRICE BY SEGMENT, \$



Source: CMWP

The fitness services market in Turkmenistan is represented by a very limited number of quality gyms. In Ashgabat, there are only 17 quality gyms. Their approximate total area is 10,224 m², of which 54% are Business-class gyms and 46% are Economy-class.

Ashgabat has the lowest fitness space provision compared to other major cities in neighboring countries — just 10 m² per 1,000 people.

Since the fitness services market in Turkmenistan is at an early stage of development, potential consumers are forced to bear a higher financial burden. High membership fees and a limited number of gyms are, in our view, also driven by the relatively low demand for fitness services among the population.

In Ashgabat, fitness clubs lack swimming pools, martial arts areas, saunas/hammams, and spa zones, making them less attractive compared to gyms in other countries.

At this stage of development of the fitness market in Turkmenistan, the number of chain gyms in the country is limited. In the capital, a single network accounts for 47% of the market.

It is also worth noting the extremely low presence on social media and popular online platforms. The only effective way to find and contact fitness clubs is through government resources.

ASHGABAD

~\$242,8/month
Business

~\$104,7/month
Economy

17
Number of gyms
in the city

* the prices were calculated based on six-month and annual membership plans

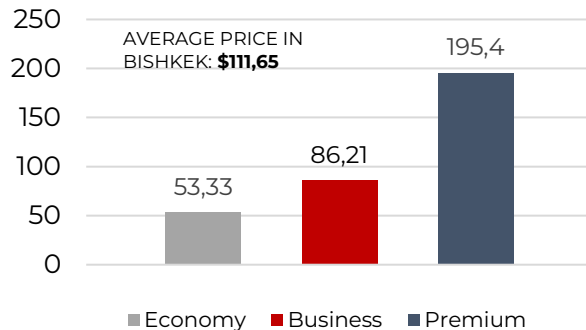


KARVEN. PREMIUM / BISHKEK

FITNESS FACILITY EQUIPMENT

Services	Amount	Share
Fitness Bars	17	65%
Group training studios	19	73%
Swimming pools	6	23%
Martial arts zones	13	50%
Saunas/hammams	5	19%
Spa areas	8	31%

AVERAGE MONTHLY MEMBERSHIP PRICE BY SEGMENT, \$



Source: CMWP

The capital of Kyrgyzstan, Bishkek, is the largest and most populous city in the country, with over 1 million residents. There are a total of 26 fitness centers in Bishkek, with a combined area of 28,185 m². Of these, 40% fall into the Economy class, 13% into the Business class, and 46% are classified as Premium.

Despite the relatively limited supply, the city demonstrates a strong level of fitness space provision — 24.18 m² per 1,000 people.

It is worth noting that despite the variety of offerings, the most common features in Bishkek's fitness centers are group workout rooms (present in 73% of gyms) and martial arts zones (50% of gyms). Saunas and hammams are unpopular among fitness centers in Bishkek — only 19% offer access to them, making it the lowest level of bath facility availability in the region after Turkmenistan.

Interestingly, despite a relatively developed fitness market, the online presence of fitness brands remains limited to social media platforms used for customer outreach. Creating dedicated websites is uncommon — only 31% of gyms have their own web pages.

BISHKEK

~\$195,4/month

Premium

~\$53,3/month

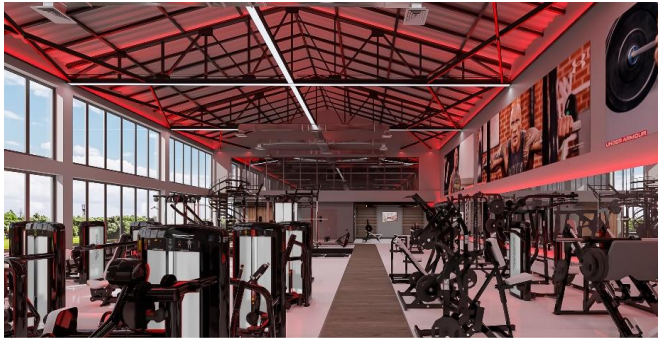
Economy

26

Number of gyms in the city

*the prices were calculated based on six-month and annual membership plans



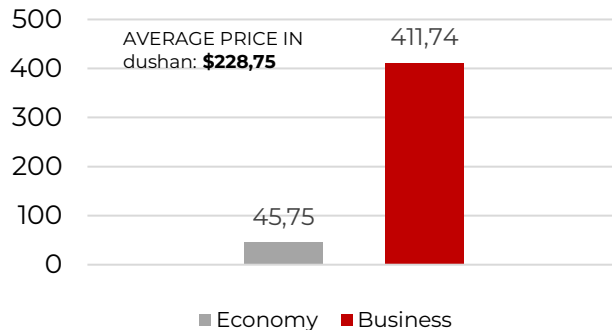


CROCUS FITNESS. PREMIUM / DUSHANBE

FITNESS FACILITY EQUIPMENT

Services	Amount	Share
Fitness Bars	8	80%
Group training studios	8	80%
Swimming pools	4	40%
Martial arts zones	8	80%
Saunas/hammams	4	40%
Spa areas	8	80%

AVERAGE MONTHLY MEMBERSHIP PRICE BY SEGMENT, \$



Source: CMWP

IQ Fitness/ Tashkent 2025 / CMWP

The fitness services market in Tajikistan, as in most Central Asian countries, is at an early stage of development. The country has the most limited number of fitness centers in the region — only 10 high-quality gyms.

In Dushanbe, the total area of high-quality fitness centers amounts to approximately 27,811 m². Of this, 2,282 m² is occupied by Economy-class gyms, 4,886 m² by Business-class gyms, and 20,643 m² by Premium-class gyms — representing 74% of the total fitness space in the city. However, in terms of quantity, Premium-class gyms account for only 30% of all facilities. Nonetheless, this is the highest ratio of premium gyms to the total number of gyms compared to other countries in the region.

The provision of high-quality fitness space stands at 27.46 m² per 1,000 people — one of the highest levels in Central Asia, second only to Kazakhstan.

One of the key distinguishing features of fitness centers in Dushanbe is that they are mostly presented as full-service complexes offering a wide range of amenities. For example, 80% of gyms have martial arts zones and spa areas on-site — the highest ratio in Central Asia. Additionally, 40% of gyms are equipped with swimming pools and saunas.

At the same time, it is worth noting that the online presence of gyms in the country is relatively well-developed, with 70% having their own websites. As in most other Central Asian countries, all gyms also maintain pages on popular social media platforms.

ДУШАНБЕ

~\$411,7/month

Business

~\$45,7/month

Economy

10

Number of gyms in the city

*the prices were calculated based on six-month and annual membership plans



SUMMARY

Overall Growth and Potential of the Fitness Industry:

Central Asia is showing dynamic growth in the fitness industry, as evidenced by a substantial total area of high-quality fitness facilities across the region (305,562 m²) and a significant number of establishments (210 gyms). However, the level of fitness space availability varies notably between cities, with Ashgabat and Samarkand lagging behind more developed markets like Astana or Bishkek. This disparity highlights strong potential for further growth and investment in largely untapped markets.

Market Segmentation:

Despite relatively low average income levels across the region (with an average salary of \$480.6), the Central Asian fitness market includes not only economy-class gyms but also a notable share of premium clubs (10%). This indicates a growing demand for high-quality services among various segments of the population.

Pricing Anomalies and Their Causes:

Membership prices in Bishkek, Ashgabat, and Dushanbe are significantly higher than in major cities of Kazakhstan and Uzbekistan, despite the lower level of gym facilities. This is most likely due to the limited supply of fitness services and the relatively low popularity of fitness among the local population, which restricts competition and drives up service prices.

Regional Disparities in the Fitness Industry:

Kazakhstan holds a dominant position in the Central Asian fitness market, accounting for 58% of the total area of high-quality fitness centers. This highlights the uneven development of the industry across the region, with other countries such as Uzbekistan, Tajikistan, and Turkmenistan holding significantly smaller shares of the regional market. Additionally, there are notable differences in levels of digitalization: Kazakhstan and Uzbekistan are somewhat ahead of other countries in the region in adopting digital technologies and maintaining an online presence.



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