

HOTEL AND TOURISM INDUSTRY OF CENTRAL ASIA

KEY FINDINGS 2025

Central Asia tourism is at record highs, driven by CIS travelers + rapid growth from China, Turkey, Korea, India. Fastest decadal growth: Uzbekistan (+300%), Kazakhstan (+138%), Kyrgyzstan (+91%), Tajikistan (+239%).



Uzbekistan 2025 H1: 4.2M arrivals, **+48%** YoY

Sources: Kyrgyzstan, Tajikistan, Kazakhstan, Russia, China

Types: Cultural, eco, gastronomy, pilgrimage

Drivers: Visa-free regime, major airport upgrades, strong marketing

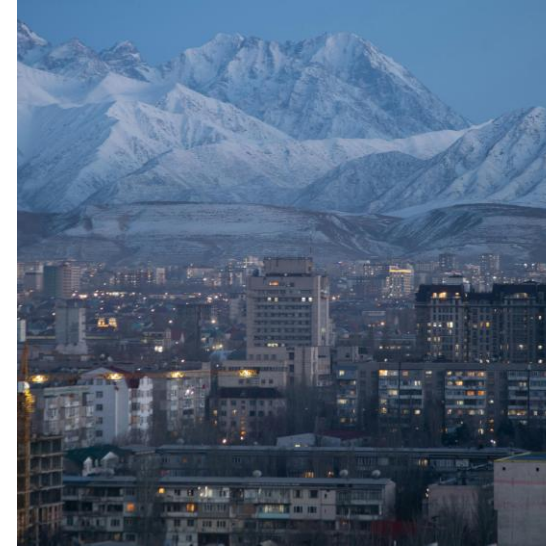


Kazakhstan 2025 H1: 7.5M arrivals, **+8.7%** YoY

Sources: Uzbekistan, Kyrgyzstan, Russia, China, India, Turkey

Types: Leisure, VFR, business/MICE

Drivers: Visa-free access to 87 countries; Astana/Almaty as regional hubs



Kyrgyzstan 2025 H1: 2.8M arrivals, **+7.7%** YoY

Sources: Uzbekistan, Kazakhstan, Russia, China

Types: Eco-tourism, trekking, Silk Road routes

Drivers: Visa-free for China, Issyk-Kul demand, organized travel groups



Tajikistan 2025 H1: 0.76M arrivals, **+31%** YoY

Sources: CIS, China, Iran, Afghanistan

Types: Adventure and cultural

Drivers: Infrastructure upgrades; emerging frontier market

INTERNATIONAL CHAINS HOTELS

International hotel chains have nearly doubled their footprint in Central Asia since 2020, driven by a record tourism surge.

UZBEKISTAN

- Top three 2025 brands: Hilton (25%), Wyndham (24%), and IHG (13%)
- +272% growth in supply since 2020, 4,473 hotel keys as of 2025
- +130% Growth 2025-2030: 4,473 > 10,311 keys

KAZAKHSTAN

- Top three 2025 brands: Accor (35%), IHG (15%), and Hilton (13%)
- +52% growth in supply since 2020, 7,200 hotel keys as of 2025
- +32% growth Growth 2025-2030: 7,200 > 9,481 keys

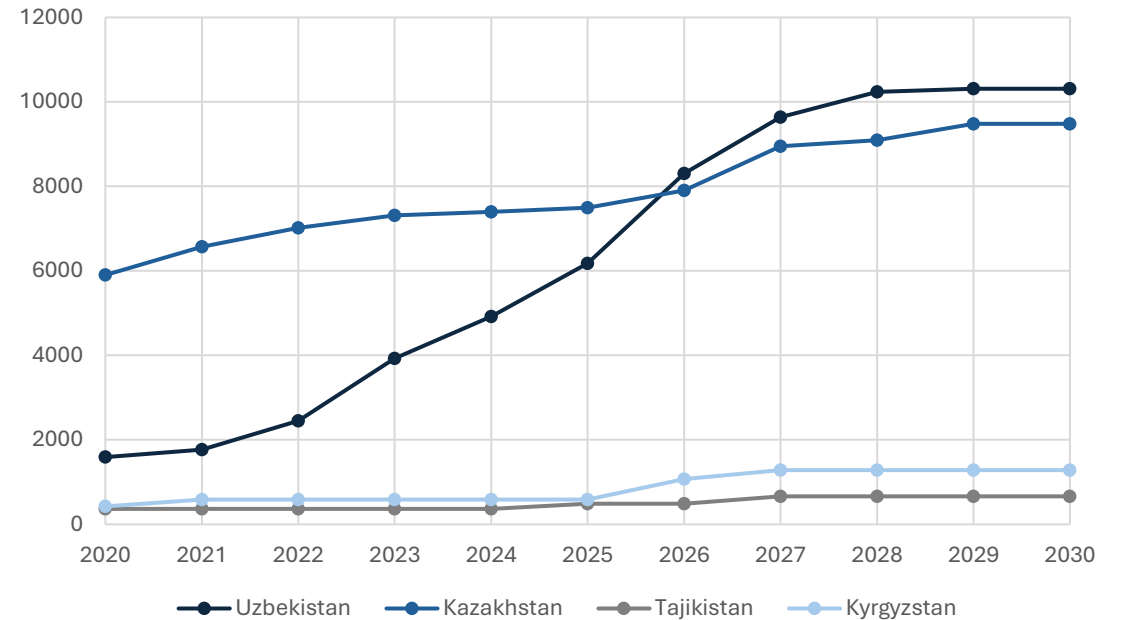
KYRGYZSTAN

- Top three 2025 brands: Marriott (31%), Hyatt (31%), and Accor (27%)
- +38% growth in supply since 2020, 585 hotel keys as of 2025
- +122% Growth 2025-2030 585 > 1,284 keys

TAJIKISTAN

- Top three 2025 brands: Hyatt (46%) Hilton (30%) and IHG (24%)
- +33% growth in supply since 2020, 485 hotel keys
- +37% Growth 2025-2030 485 > 663

Number of Branded Hotel Keys by Country, 2020-2030



12,743

Branded hotel rooms in Central Asia 2025



21,739

Branded hotel rooms in Central Asia by 2030

Kazakhstan

2025 leader in supply of branded hotels



Uzbekistan

2030 leader in supply of branded hotels

BOUTIQUE HOTELS

The total revenue of the boutique hotel market is projected to increase from \$22 million in 2025 to \$55 million by 2035, reflecting an average annual growth rate (CAGR) of 9.6%

UZBEKISTAN

- 41 quality boutique hotels
- ~\$55 – average price per night*
- Key types: design (54%), classic (22%), historical (22%)

KAZAKHSTAN

- 27 quality boutique hotels
- ~\$40 – average price per night*
- Key types: classic (52%), budget (33%), design (11%)

KYRGYZSTAN

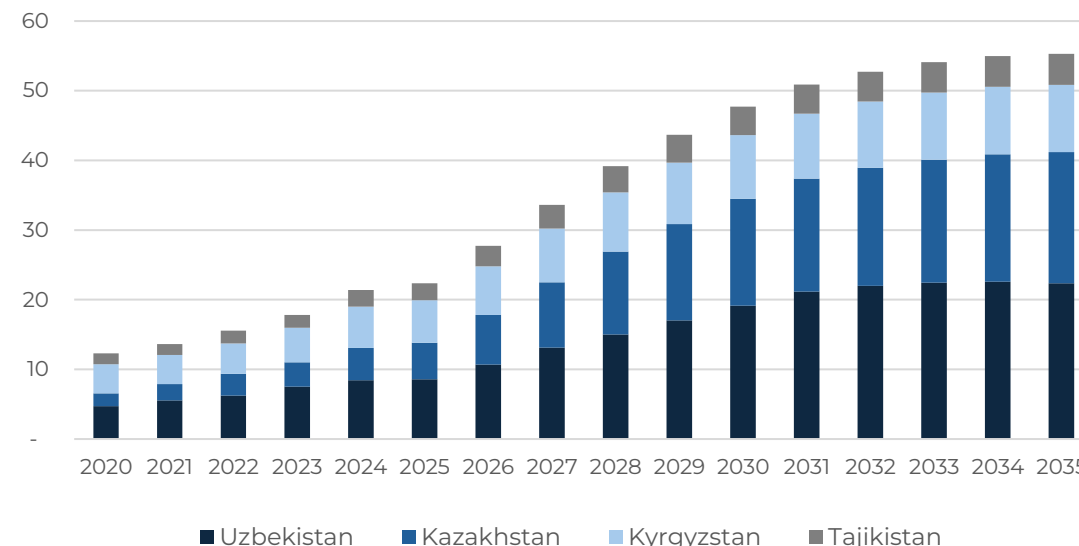
- 31 quality boutique hotels
- ~\$46 – average price per night*
- Key types: classic (68%), design (16%), adventure (10%)

TAJIKISTAN

- 8 quality boutique hotels
- ~\$46 – average price per night*
- Key types: classic (63%), adventure (25%), budget (13%)

*Price per person, excluding VAT, commissions, and breakfast fees

Forecast of Boutique Hotel Market Revenue in Central Asia for 2025-2035, USD million



38%

Uzbekistan's share in the total number of quality boutique hotels in Central Asia

46%

Classic design is the dominant style

2092

Number of boutique hotel rooms in 2025

↑65%

3458

Forecasted number of boutique hotel rooms in Central Asia by 2035

GLAMPING

By 2035, Central Asian glamping revenue to reach USD 29.3M, up from USD 11.1M in 2025, driven by eco-tourism and 10.3% CAGR

UZBEKISTAN

- 22 Glamping Sites
- ~\$113 average price per night
- Top Locations: Issyk-Kul Region, Chuy Region, Chon-Kemin Valley

KAZAKHSTAN

- 23 Glamping Sites
- ~\$123 average price per night
- Top Locations: Almaty foothills, Charin Region, Akmola Pinebelt

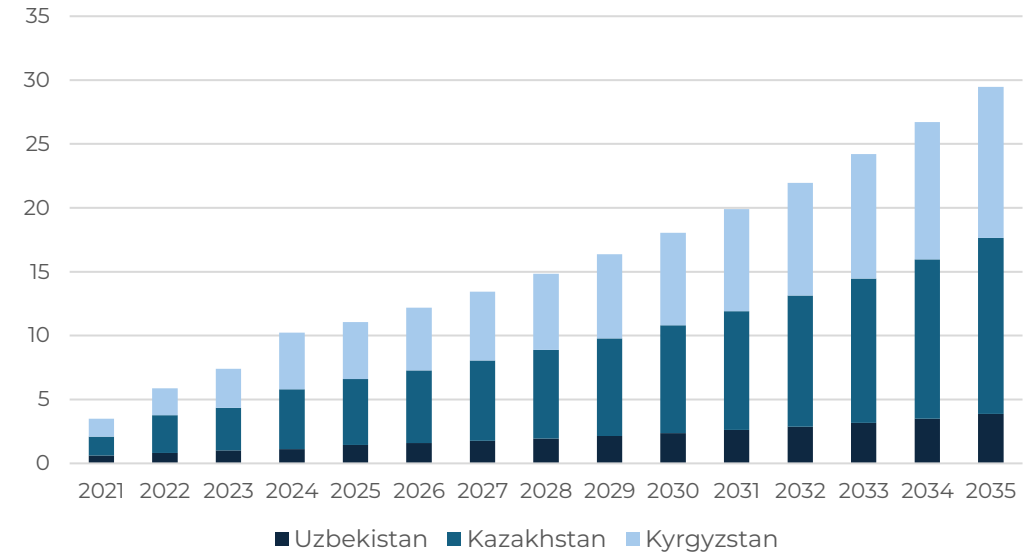
KYRGYZSTAN

- 7 Glamping Sites
- ~\$115 average price per night
- Top Locations: Chimgan Mountains, Kyzylkum Desert & Nurata Mountains Karakalpakstan (Aral Sea)

TAJIKISTAN

- 1 Glamping Site
- Top Location: Fann Mountain Range

Central Asia Glamping Market Revenue Outlook 2025–2035, USD Millions



1,077,570

Collective Instagram Followers

53

Total Glamping Sites

Kazakhstan

2025 leader in glamping locations

31% Yurt

Accommodations in Central Asia

*Price per person, excluding VAT, commissions, and breakfast fees



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Access to Full Reports
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