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Current State and Development Trends of Accommodation and Food Services in Uzbekistan

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Abstract: This article examines the current state, structural characteristics, and major development trends of accommodation and food service activities in Uzbekistan, with particular attention to their growing role in the tourism sector and the broader service-based economy. In recent years, the accommodation and food service industry has demonstrated significant potential for economic growth, employment generation, entrepreneurial development, and the diversification of tourism products. The expansion of domestic and international tourism, improvement of transport accessibility, development of tourism infrastructure, digitalization of service delivery, and increasing consumer demand for higher-quality and more diverse services have contributed to the transformation of this sector. At the same time, differences in the level of infrastructure development between regions, variations in service quality, limited adoption of modern technologies by some enterprises, seasonal fluctuations in demand, and the need to strengthen the professional competencies of employees remain important challenges. The study analyzes the dynamics and structural changes in accommodation and food services, including the development of hotels, hostels, guest houses, family-run accommodation facilities, restaurants, cafés, catering enterprises, and other related service providers. Particular attention is given to changes in the number of operating enterprises, service volumes, employment, investment activity, regional distribution, and the contribution of these activities to the development of the national service sector. The research also considers the influence of digital technologies, online booking systems, electronic payment instruments, digital marketing, customer-review platforms, and information technologies on the competitiveness and operational efficiency of accommodation and food service enterprises.

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1. Introduction

In recent years, the service sector has played an increasingly important role in supporting economic activity in Uzbekistan, with accommodation and food services gaining particular significance. Changes in consumer demand, the development of domestic and international tourism, and the expansion of service infrastructure across the regions have increased demand for these activities. At the same time, the entry of new businesses, the diversification of services, and rising consumer expectations regarding quality, prices, and service conditions have influenced competition in the accommodation and food services market.[1]

Accommodation and food services meet the population's everyday needs and are closely linked to the development of tourism, trade, transport, and other services. In

regions with substantial tourist flows, hotels, family guesthouses, restaurants, cafés, and other food service establishments have a considerable influence on the region's attractiveness as a tourist destination. Consequently, growth in the value of services alone is insufficient to assess the development of this sector. The composition, quality, and geographical distribution of services, as well as their responsiveness to market demand, must also be considered.[2]

According to the National Statistics Committee of the Republic of Uzbekistan, the value of accommodation and food services increased from UZS 52,349.7 billion in 2020 to UZS 71,806.7 billion in 2021, UZS 107,599.9 billion in 2022, UZS 145,840.0 billion in 2023, UZS 183,946.5 billion in 2024, and UZS 226,955.8 billion in 2025. Thus, the nominal value of these services increased more than 4.3-fold between 2020 and 2025. In 2025, the reported growth index for accommodation and food services was 110.4% relative to the previous year, equivalent to an increase of 10.4%. These indicators show that the accommodation and food services market in Uzbekistan has expanded.[3]

The value of services also varied across regions. In 2025, accommodation and food services amounted to UZS 38.7 trillion in Tashkent city, UZS 26.0 trillion in Samarkand region, UZS 23.6 trillion in Namangan region, and UZS 22.8 trillion in Fergana region. These differences may reflect regional population size, consumer market capacity, tourism potential, entrepreneurial activity, and the level of service infrastructure development. Identifying regional disparities in the sector's development and assessing their economic causes are therefore important research tasks.[4]

Against this background, assessing the current state of accommodation and food services in Uzbekistan, identifying trends in sectoral indicators, examining regional disparities, and investigating the factors influencing development are of both scientific and practical importance.

International researchers have examined the development of accommodation and food services in relation to service quality, customer satisfaction, customer loyalty, and the market position of individual businesses. The following studies are particularly relevant.[5]

Kandampully and Suhartanto examined customer loyalty in the hotel industry and established a direct relationship between customer loyalty, hotel image, and customer satisfaction. They noted that satisfaction with specific components of hotel services, particularly reception, housekeeping, food services, and prices, plays an important role in shaping customers' attitudes towards a hotel.[6]

Kasiri, Cheng, Sambasivan, and Sidin found that combining service standardization with customization to meet customer requirements improves service quality, which in turn influences customer satisfaction and loyalty.[7]

Research on food services has also examined the relationship between service quality and customers' subsequent behavior. In a study of ethnic restaurants, Ha and Jang found that food quality and service quality positively influence customer satisfaction and loyalty.

The existing literature indicates that most researchers have examined accommodation and food services from the perspective of individual businesses or consumers, focusing primarily on the relationships between service quality, satisfaction, image, and customer loyalty. In the context of Uzbekistan, however, further research is needed to assess accommodation and food services as a single category of economic activity by jointly examining longer-term changes in service values, growth rates, structural shares, and regional disparities. Accordingly, this study focuses on analyzing the current state and development trends of accommodation and food services in Uzbekistan using official statistical data.[8].

2. Materials And Methods

The analysis draws on official data from the National Statistics Committee of the Republic of Uzbekistan, indicators from the SIAT statistical database, and relevant academic literature. Statistical and comparative analysis, time-series analysis, and grouping methods were used to examine changes in the value and composition of services. Analysis and synthesis, induction and deduction, and abstract logical reasoning were applied to synthesize the results and formulate the research conclusions.[9].

3. Results and Discussion

Accommodation and food services constitute a subsector of the broader service sector. The study therefore establishes the need to examine the state of the service sector across Uzbekistan's regions, including accommodation and food services.

Uzbekistan is implementing a wide range of measures to improve the quality and efficiency of the service sector and introduce modern management systems and digital technologies. In particular, Goal 34 of Annex 1 to Presidential Decree No. PF-60 of January 28, 2022, "On the Development Strategy of New Uzbekistan for 2022–2026," **sets out the following objectives under the priority of developing regional engineering, communications, and social infrastructure, as well as service industries:[10]**

Triple the value of services over the following five years and create a total of 3.5 million new jobs by developing service industries in the regions.

Establish 130 modern markets and shopping complexes, together with 65 large and 5,000 small service facilities, by developing trade, roadside services, and related infrastructure across the country.

Reduce the share of the informal economy in the service sector to one-third of its existing level and provide additional incentives to businesses to enhance the sector's attractiveness.[11]

In view of these objectives and the various ongoing global crises, improving state support mechanisms for Uzbekistan's service sector remains a pressing issue. This requires improving the business environment through strategic infrastructure development, identifying the systemic and operational problems arising in this process, and addressing them through evidence-based recommendations and proposals.

The service sector is an integrated component of strategic importance within the national economy. It substantially influences the structure, efficiency, and development of other economic sectors and industries. At the same time, its own growth potential and prospects depend on the short- and long-term development of those sectors and industries. The mechanisms supporting service sector development and its integration into the wider economy also directly affect national economic stability and growth through multiplier effects.[12]

An approach to assessing the service sector should reflect these processes and interrelationships. In the existing literature, assessments of the sector's role in the national economy and socioeconomic development, as well as its efficiency, competitiveness, and other characteristics, have primarily relied on macroeconomic indicators such as its share of gross domestic product (GDP). This approach indicates the sector's position within the national economy, since GDP measures the final outcomes of economic activity across both

material production and service activities. A higher service sector share of GDP is associated with a higher standard of living and quality of life. Figure 1 presents the service sector's share of GDP in Uzbekistan. [13]

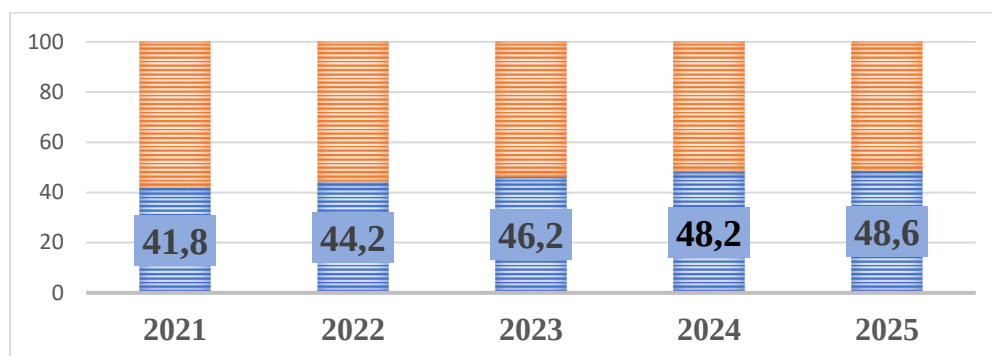


Figure 1. Service sector share of GDP in Uzbekistan (%)

Figure 1 shows a steady increase in the service sector's share of GDP in Uzbekistan. The share rose from 41.8% in 2021 to 48.6% in 2025, an increase of 6.8 percentage points over the five-year period. These statistics indicate the rapid development of the country's service sector. The next stage of the analysis examines indicators for the service sector as a whole and for accommodation and food services within it (Table 1).[14]

Table 1

Analysis of the service sector in Uzbekistan

No	Service category	Value of services (UZS billion)		Share in 2025 (%)	2025/2024 index (%)
		2024	2025		
	Total services	840146.5	1050292.5	100.0	125.0
	Of which, by main category				
1	Information and communication services	56865.2	79485.5	7.6	139.8
2	Financial services	135832.5	171867.0	16.4	126.5
3	Transport services	151825.0	188270.8	17.9	124.0
	including road transport services	73799.8	95853.8	x	129.9
4	Accommodation and food services	183946.5	226955.8	21.6	123.4
5	Trade services	154995.1	186957.3	17.8	120.6
6	Real estate services	20900.6	25921.6	2.5	124.0
7	Education services	32110.5	39626.7	3.8	123.4
8	Health services	15961.8	19890.6	1.9	124.6
9	Rental services	9861.6	12797.6	1.2	129.8
10	Repair of computers and household goods	11723.9	14381.8	1.4	122.7
11	Personal services	15550.6	19928.0	1.9	128.1
12	Architectural, engineering, technical testing and analysis services	10544.6	13059.5	1.2	123.9
13	Other services	40028.6	51150.3	4.9	127.8

In 2025, accommodation and food services accounted for 21.6% of total services in Uzbekistan, representing the largest share among service categories. Trade and transport services, which had held the largest shares for many years, accounted for 17.8% and 17.9%,

respectively. The growing share of accommodation and food services was supported by an increase in their value to UZS 226,955.8 billion in 2025, up by UZS 43,009.3 billion from 2024.[15]

To assess the development of accommodation and food services in Uzbekistan, it is necessary to examine their evolution in recent years at both the national and regional levels (Table 2).

Table 2

Accommodation and food services in Uzbekistan by region

Region	2021	2022	2023	2024	2025	Change in 2025 relative to 2021	
						Absolut e	Inde x (%)
Uzbekistan	71806.7	107599.9	145840	183946.5	226955.8	155149.1	316.1
Republic of Karakalpakstan	4815.4	7137.1	8736.9	10617	12385.5	7570.1	257.2
Andijan region	5398	7581.2	9939.4	12470.2	15147.3	9749.3	280.6
Bukhara region	4556.9	6360.2	7953.6	9542.6	11576.6	7019.7	254.0
Jizzakh region	2336	3378.4	4604.8	5800	6949.1	4613.1	297.5
Kashkadarya region	8158.6	10767.7	13722.5	16779.2	19981.2	11822.6	244.9
Navoi region	1221.2	3202.9	4436.1	5582.7	6885.9	5664.7	563.9
Namangan region	6555.8	10601.4	14531.3	18382.2	23631.5	17075.7	360.5
Samarkand region	6700.1	10514.6	15716	20264.2	25977.9	19277.8	387.7
Surkhandarya region	3674.1	5182.7	6649.4	8226.1	9760.8	6086.7	265.7
Syrdarya region	1506.3	2400.5	2848	3593.2	4365.2	2858.9	289.8
Tashkent region	5874.7	7941.3	10701.7	13226.8	16110.2	10235.5	274.2
Fergana region	8100.5	10837.6	14776.7	18441.6	22806.9	14706.4	281.5
Khorezm region	3298.2	5780.7	8186.4	10308.3	12632.9	9334.7	383.0
Tashkent city	9610.6	15913.1	23036.6	30711.3	38743.7	29133.1	403.1

The data in Table 2 show that the value of accommodation and food services increased steadily across all regions during 2021–2025. Tashkent city recorded the highest value throughout the period, rising from UZS 9,610.6 billion in 2021 to UZS 38,743.7 billion in 2025.

In 2025, Syrdarya region recorded the lowest value of accommodation and food services among the country's regions, at UZS 4,365.2 billion, compared with UZS 1,506.3 billion in 2021. In 2021, the lowest value was recorded in Navoi region, at UZS 1,221.2 billion. Over the five-year period, Navoi region achieved the largest relative increase: the value of these services in 2025 was approximately 5.6 times its 2021 level. This indicates substantial expansion of accommodation and food services in the region.[16].

5. Conclusion

The analysis shows that Uzbekistan's accommodation and food services market expanded substantially during 2020–2025. However, the value of services and their growth rates differed across regions. These differences are primarily attributable to regional consumer demand, tourist flows, entrepreneurial activity, and the level of service

infrastructure development. In the author's view, growth in the value of services alone is insufficient to assess the sector's development. Service quality, value for money, employees' professional training, and businesses' ability to adapt to changes in customer demand are also important determinants. Future development of accommodation and food services should reflect each region's existing capacity and actual demand. In regions where these services are relatively underdeveloped, priority should be given to expanding family guesthouses, small food service establishments, and local gastronomic services, while supporting entrepreneurial initiatives. Businesses should regularly assess customer feedback and requirements, update their service offerings accordingly, and make effective use of local cuisine and national hospitality traditions. This approach can support regional development of accommodation and food services, improve service quality, and strengthen businesses' market positions.

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