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This special issue of the international scientific journal *Turk Eli* has been published based on the proceedings of the International Scientific and Practical Conference entitled "Contemporary Trends in the Development of Education, Science and Innovation in the Eurasian Space: Human Capital, Digital Transformation and Sustainable Development," held on August 4–5, 2026, in the Kyrgyz Republic (Issyk-Kul).

Об этом специальном выпуске

Настоящий специальный выпуск международного научного журнала *Turk Eli* опубликован по материалам Международной научно-практической конференции на тему «Современные направления развития образования, науки и инноваций в Евразийском пространстве: человеческий капитал, цифровая трансформация и устойчивое развитие», состоявшейся 4–5 августа 2026 года в Кыргызской Республике (Иссык-Куль).

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The Role of the Food Industry in Uzbekistan's Industrial Development: Trends, Structural Changes and Statistical Assessment

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Abstract. *This study analyzes the development trends and economic role of the food industry in Uzbekistan using official statistical data for 2000–2025. The research examines production dynamics, the industry's share in manufacturing and consumer goods, and per capita production indicators. The results indicate that the food industry has achieved stable growth through modernization, increased processing of agricultural raw materials, and structural economic reforms. Despite a declining share in manufacturing, the industry remains a strategic contributor to food security, industrial competitiveness, and sustainable economic development. Recommendations are proposed to support digitalization, innovation, and deeper processing of agricultural products.*

Keywords: *food industry; Uzbekistan; manufacturing industry; food security; economic development; statistical analysis*

Роль пищевой промышленности в развитии промышленности Узбекистана: тенденции, структурные изменения и статистическая оценка

Аннотация. *В статье исследованы тенденции развития и экономическая роль пищевой промышленности Республики Узбекистан на основе официальных статистических данных за 2000–2025 гг. Проанализированы динамика производства, доля отрасли в обрабатывающей промышленности и показатели производства на душу населения. Установлено, что устойчивое развитие отрасли обеспечивается модернизацией производства, углублением переработки сельскохозяйственного сырья и структурными реформами. Предложены направления дальнейшего развития отрасли на основе цифровизации, инноваций и повышения эффективности переработки.*

Ключевые слова: *пищевая промышленность; Республика Узбекистан; обрабатывающая промышленность; продовольственная безопасность; экономическое развитие; статистический анализ.*

In the Republic of Uzbekistan, structural modernization of the economy, diversification of industry, and ensuring national food security are among the priority directions of state economic policy. In this process, the food industry serves as one of the important drivers of the country's economic growth not only by providing the population with high-quality food products but also by deeply processing agricultural products, creating high added value, increasing export potential, and creating new jobs[1; 4; 5], which is assessed in international practice as one of the main factors for developing agro-food value chains[6; 8].

In recent years, large-scale reforms have been carried out in the country aimed at developing the food industry, expanding processing capacities, modernizing production processes, implementing international quality standards, and attracting investment. Within the framework of the New Uzbekistan Development Strategy, special attention is paid to increasing the competitiveness of this industry, expanding the level of deep processing of local raw materials, and producing import-substituting and export-oriented products, as confirmed by international research[2–5; 9].

In economic literature, various aspects of food industry development, including its competitiveness, impact on economic growth, and role in the industry structure, have been extensively researched. However, in the context of Uzbekistan, there are insufficient studies dedicated to the comprehensive assessment of industry development trends based on long-term official statistical data, the assessment of its share in the structure of manufacturing and consumer goods, and the relationship between growth rates and production indicators per capita. In particular, in the scientific research of foreign economists such as J.S. Mokrziska[8], M.J. Eskandari[9], K.E. Söyebandriya[10], and J. Shoham[11], the role of the food industry in the structure of the

country's industrial sector was assessed, and using the methodology used in this scientific research process, we also deemed it necessary to evaluate the role of the food industry in the industry of Uzbekistan.

In this regard, the purpose of this study is to comprehensively analyze the role of the food industry in the national economy of the Republic of Uzbekistan based on official statistical data, evaluate the development trends of the industry, and develop scientifically grounded conclusions and practical proposals for its further development.

The scientific novelty of the study is that it provides a comparative analysis of the development dynamics of the food industry for 2000–2025 with indicators of the manufacturing industry, the volume of consumer goods production, and per capita, and provides a comprehensive assessment of structural changes and the developmental characteristics of the industry in the country's economy.

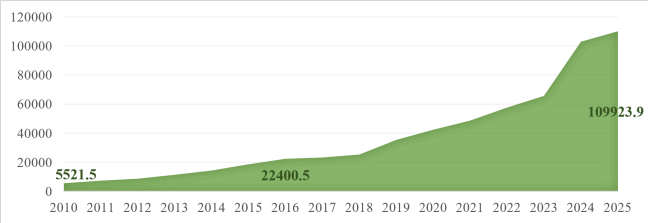


Figure 1. Volume of food production in Uzbekistan, in billion soums

The analysis results show that during the period from 2010 to 2025, the volume of food production in the Republic of Uzbekistan had a steady growth trend. This growth is explained not only by the increase in agricultural production volumes but also by the expansion of deep processing capacities, the growth of investment activity, and the institutional reforms being implemented in the industry[7].

Analysis shows that the acceleration of growth rates after 2017 is a positive result of measures taken in the country to modernize industry, improve the investment climate, and support export-oriented production.

According to the analysis, the volume of food production in the country for 2010-2025 is characterized by a steady growth trend. Specifically, if between 2010 and 2016, the volume of food production in the country increased from 5521.5 billion soums to 22400.5 billion soums, then under the conditions of New Uzbekistan, due to the development of the industry and the increase in the volume of processing agricultural products, especially fruits and vegetables, meat and meat products, milk, and dairy products, the volume of food products produced in the country by 2025 amounted to 109923.9 billion soums (see Figure 1). According to official statistical data, if in 2019-2023, the volume of food industry production in the country had an accelerated growth trend compared to 2010-2018, then in 2023-2025, the growth trend observed in previous periods is characterized by further acceleration. This situation is explained by the fact that in recent years, priority has been given to measures aimed at increasing the modernization coefficient at the country's food industry enterprises by equipping them with production machinery that allows for the deep processing of raw materials. These results also align with the assessments of World Bank and European Union experts on the modernization of Uzbekistan's agro-food sector[5].

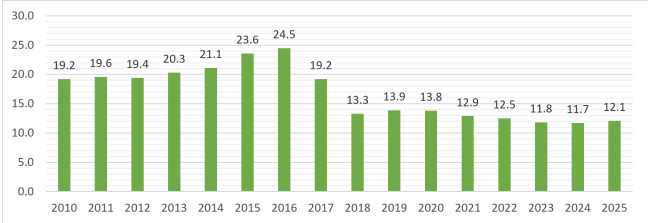


Figure 2. Food production volume relative to the total volume of manufacturing industry products, in percent

Additionally, the food industry is one of the sectors producing products that are part of the population's primary consumption. When evaluated in relation to the volume of the country's manufacturing industry products, the volume of food production in the period under study accounted for 19.2 percent of the total volume of manufacturing industry products in 2010, 24.5 percent in 2016, and 12.1 percent by 2025 (see Figure 2). The decrease in the share of food products in the total volume of manufacturing industry products in individual years does not mean that the industry is in crisis. On the contrary, this situation indicates that other high-tech industries with high added value are developing at a faster pace in the country's economy.

From this perspective, the reduction of the relative share of the food industry while maintaining growth in absolute production volume can be evaluated as a result of structural diversification of the economy.

It should be noted that as the country's economy industrializes, structural changes are occurring in the manufacturing industry and the transition to the production of high-tech products. As a result, in the structure of the manufacturing industry's total output, the volume of food production has a downward trend, as proven by numerous scientific studies in economic literature. A similar practice is observed in our country, i.e., it can be concluded that as a result of the development of the industrial sector in the conditions of New Uzbekistan, including the priority of producing industrial products with high

added value based on modern technologies in various industrial sectors, the volume of food production tends to decrease compared to the total manufacturing industry. In recent years, the integration of digital technologies, automated management, and value chains has been recognized as one of the important factors in increasing the competitiveness of the food industry[10; 11].

To clarify the analysis results, attention must be paid to the structural indicators of consumer goods production. To date, numerous scientific studies conducted in economic literature have concluded that the growth of the country's population's well-being causes structural changes in the production of consumer goods and their consumption costs. At the same time, scientific views have been formed regarding the improvement of public welfare, i.e., as the country industrializes, the population's income increases and the volume of non-food production in the structure of consumer goods increases.

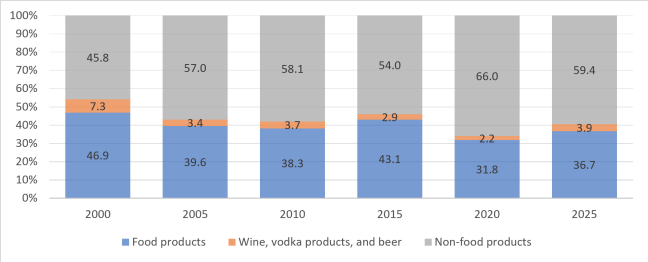


Figure 3. Structural indicators of consumer goods production in Uzbekistan's industry, as a percentage of total volume

According to the analysis, while the share of food products in the structure of consumer goods produced in the country's industry decreased by 8.6 percentage points from 46.9 to 38.3 percent between 2000 and 2010, this figure increased by 3.5 percentage points to 43.1 percent between 2010 and 2015. In the period up to 2020, the share of food products in the total volume of manufactured consumer goods decreased by 11.3 percentage points to 31.8 percent, and by 2025, it increased by 4.9 percent compared to 2020 to 36.7 percent. Overall, between 2000 and 2025, the share of food products in the structure of consumer goods produced in the country decreased by 10.2 percentage points, showing a trend of dynamic development (see Figure 3). This situation is characterized by the fact that in the structure of consumer goods production in the country, the production volume of non-food goods with high added value has a high growth trend compared to the production volume of food products. The change in the share of food products in the structure of consumer goods reflects the structural changes occurring in the structure of consumption and industrial production in the country's economy.

The increase in the share of non-food products is associated with an increase in public income, changes in consumer culture, and the diversification of industrial sectors. At the same time, the continued growth of food production volumes in absolute terms confirms the sustainable development of this sector.

This circumstance indicates that the ratio between food prices and other types of consumer goods, including their production volumes, is constantly changing. Most domestic experts expressed the opinion that this situation is related to the increase in the tax burden on enterprises, the high need to modernize production equipment, and therefore the costs of its renewal have led to an increase in product prices, the high cost of banking services (high interest rates) provided in the country, and the unjustified increase in food prices produced through the use of credit and leasing services. At the same time, the effectiveness of financial support programs implemented by the state to finance innovations in enterprise activities is at a low level, and the allocated preferences, tax, and credit benefits are insufficient to cover the costs[12]. This, in turn, leads to a trend of dynamic development in the share of food products within the structure of consumer goods production. At the same time, it is intended to include production costs and financial obligations to be fulfilled by the enterprise.

Also, when analyzing the development trends of the food industry in the country, a mutual comparative comparison of the growth trends in food production volumes is conducted relative to the structure of the country's manufacturing industry. At the same time, it is considered normal that the volume of food production usually has a relatively higher indicator compared to the development trends of the general manufacturing industry. Since the demand of the country's population for consumer goods, especially food products, is of paramount importance compared to other types of products, as population incomes increase, the volume of food production also increases, and it is a normal phenomenon when it is slightly higher or equal to the overall average indicator of the manufacturing industry[13]. This means that the population's demand for food products is being effectively met.

It should be noted that due to Uzbekistan's high natural-geographical potential for agricultural production, the resource and raw material capabilities of the country's food industry stand out compared to other sectors. In particular, the volume of demand for products grown in the country's agriculture is high not only in domestic but also in international markets, and this circumstance allows for the conclusion that the development of the food industry through the deep processing of grown agricultural products

can have a positive impact on the country's export potential. In this regard, based on the analysis of growth trends in food industry production in the country over recent years, it will be possible to assess the development rates of the industry compared to the manufacturing industry.

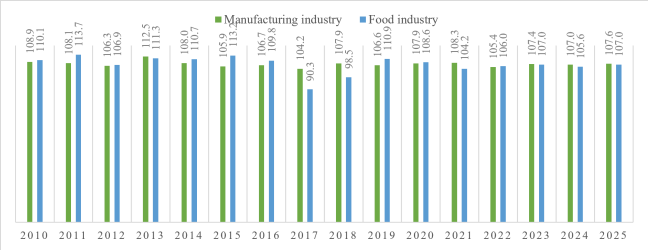


Figure 4. Growth trends in manufacturing and food industry production volumes in Uzbekistan (in percent compared to the previous year)

According to official data, the growth rate of the volume of products produced in the food industry has had a trend of dynamic development in both the country's manufacturing and food industries. According to calculations, if in 2010-2025, the average annual growth trend of products produced in the country's manufacturing industry was 107.4%, then in the food industry, this figure was 107.1% (see Figure 4). The achievement of average annual growth rates in production volumes during the statistical observation period indicates that the population's demand for food products is being effectively met. Before forming a general conclusion, we consider it appropriate to analyze the trends in the development of food production volume per capita. Calculations show that during the period under study, the growth rates of manufacturing and food industry products formed close to each other. This means that the food industry is developing as a sustainable component of the country's industry and is moving in accordance with general trends in economic growth.

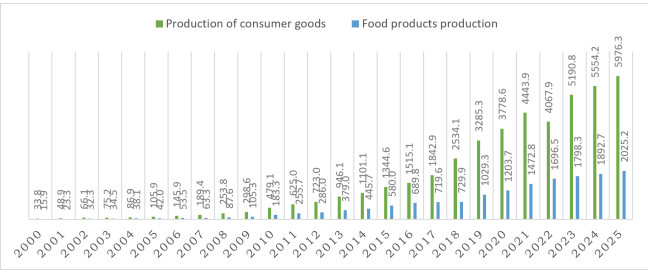


Figure 5. Indicators of the volume of production of consumer goods and food products per capita in Uzbekistan, in thousand soums

According to the data, the volume of consumer goods produced per capita in the country is characterized by a relatively high volume of food products. This trend is assessed as a natural socio-economic situation indicating the effective satisfaction of the population's needs not only for food but also for other types of consumer goods. Analysis shows that between 2000 and 2025, alongside the production of consumer goods per capita in the country, the production of food products per capita has maintained a steady development trend. During the study period, the volume of consumer goods production per capita increased from 33.8 thousand soums to 5976.3 thousand soums, and the volume of food production per capita increased from 15.9 thousand soums to 2025.2 thousand soums. Specifically, under the conditions of the New Uzbekistan economy, i.e., between 2017 and 2025, the indicator of consumer goods production per capita increased 3.2 times, and the volume of food production per capita increased 2.8 times (see Figure 5). The obtained results are characterized by the fact that, along with increasing the production volume of products with higher added value than those produced by food industry enterprises, the quality of food products is improved and the gap between their price and cost is significantly reduced through the technological modernization of food production practices and the deep processing of raw materials. The steady growth in food production volumes per capita testifies to the expanding opportunities for ensuring food security in the country. According to FAO data, the stability of national food systems is an important condition for ensuring the country's food security and economic stability[14].

The growth of this indicator is inextricably linked to the expansion of production capacities, increased labor productivity, and modernization processes carried out in the manufacturing industry.

CONCLUSION. The results of the conducted research once again confirmed that the food industry in the Republic of Uzbekistan is one of the strategic sectors of the national economy. Analysis has shown that in 2010-2025, the volume of production in the industry has a steady growth trend, which is inextricably linked to the deep processing of agricultural products, increased investment activity, modernization of production capacities, and structural reforms carried out by the state.

During the study, alongside an absolute increase in production volumes, a decrease in the share of food products within the structure of total industrial output was observed. According to the author, this situation signifies not a slowdown in the development of the food industry, but the relatively rapid development of mechanical engineering, chemistry, electrical engineering, and other high-tech industries with high added value in the country's economy.

At the same time, the fact that the pace of food production has formed close to the overall growth rates of the country's manufacturing industry

indicates the high economic stability of the sector and the possibility of effectively meeting domestic market needs.

The steady growth of food production indicators per capita confirms the consistent strengthening of the level of food security in the country and the increase in the efficiency of the processing industry.

Based on the research results, the following scientific conclusions were formulated:

• the food industry is one of the key sectors ensuring the structural stability of the country's economy;

• the high growth rates of the industry reflect the positive result of production modernization and investment policy;

• reducing the share of food in the industrial structure should be viewed as a result of economic diversification;

• the growth of production indicators per capita indicates the strengthening of the national food security level;

• the further development of the industry is directly linked to increasing the level of high technologies, digital transformation, and deep processing of products.

Based on the research results, the following practical proposals were developed:

1. Widespread implementation of digital technologies, automated control systems, and artificial intelligence elements in the food industry.

2. Expansion of high-value-added product production by increasing the share of deep processing of agricultural raw materials.

3. Diversification of export-oriented product types and strengthening the competitiveness of national brands in foreign markets.

4. Further improvement of investment, tax, and credit mechanisms to support the innovative activity of enterprises.

5. Strengthening competitive advantages in foreign markets by widely implementing international quality and food safety standards into production processes.

Overall, the research results show that the food industry in Uzbekistan has trends of sustainable development, and its significance in ensuring the competitiveness of the national economy, export potential, and food security will increase in the coming years.

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