DOI: 10.5281/zenodo.24455192
Link: https://zenodo.org/records/24455192

ANALYSIS OF THE DEVELOPMENT STATUS AND TRENDS OF FOOD SERVICE ESTABLISHMENTS IN THE SAMARKAND REGION

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Abstract. *This article analyses the development status and trends of food service establishments in the Samarkand region of Uzbekistan. The relevance of the study is determined by the rapid growth of the service sector, the transformation of Samarkand into one of the main tourist destinations of Central Asia and the growing role of food service establishments in regional income and the tourist experience. The aim of the research is to assess the current state of the food service sector of the region, to identify its structural features and development trends and to substantiate directions for its further development. The study uses official regional statistics for 2017-2025, analysis of growth rates and compound annual growth rates, structural and comparative analysis, the location quotient, per capita and per enterprise indicators and an assessment of tourism demand. The results show that between 2017 and 2025 the volume of accommodation and food services in the region increased from 1.8 to 26.2 trillion soums, at an average annual nominal rate of 39.5% compared with 28.0% nationally. The share of the sector in regional market services rose from 12.7% to 29.5%, and the region's share in the national sector from 5.8% to 11.5%. The location quotient increased from 1.28 to 1.37, indicating growing specialization, while the number of business entities decreased by 7.3% and the average volume per entity increased. Tourism services exports correspond to about 29% of the sector's volume. Development directions are proposed, including quality standards, gastronomic tourism, digitalization and the formalization of small establishments.*

Keywords: *food service establishments, catering, restaurants, Samarkand region, service sector, tourism, gastronomic tourism, regional specialization, location quotient, Uzbekistan.*

INTRODUCTION

Food service establishments - restaurants, cafes, teahouses, canteens, fast-food outlets and catering companies - form one of the most dynamic segments of the modern service economy. They satisfy one of the basic needs of the population, create a large number of jobs, especially for young people and women, and are among the first enterprises to be founded by small businesses. In tourist destinations, food service also becomes part of the tourist product: local cuisine is increasingly regarded as an attraction in its own right, and the quality of meals strongly influences the overall impression of a trip. For this reason, the development of food service establishments is closely linked both with the welfare of the local population and with the competitiveness of a region as a destination.

In Uzbekistan the service sector has grown rapidly in recent years, and accommodation and food services have become its largest component. In 2025 they accounted for 21.6% of the market services of the country [18], and their volume reached about 227 trillion soums, an increase of 10.4% compared with 2024 [15]. The Samarkand region occupies a special place in this process. It is the most populous region of the country, with 4.38 million permanent residents at the beginning of 2026 [21], and its capital is one of the main historical and tourist centres of Central Asia. In the first eleven months of 2025, more than 3 million foreign and 5.5 million domestic tourists visited the region, and

tourism services exports reached USD 606 million [35]. In 2025 the gross regional product of the region amounted to 121.5 trillion soums at current prices [32], and its economy grew by 8% [21]. Services have become one of the main sources of this growth, and food service establishments are among the most visible of them: they are present in every district, employ a large number of people and are the first point of contact between the region and its visitors. Understanding how this sector is developing is therefore important not only for entrepreneurs, but also for regional authorities responsible for employment, tourism, urban development and the preservation of the cultural image of the region.

The rapid growth of demand creates both opportunities and challenges for food service establishments. On the one hand, new restaurants, themed venues and large tourist complexes are being opened; on the other hand, the sector remains dominated by small enterprises, a considerable part of its activity is informal, and the quality of service varies widely. State policy aims to accelerate the development of tourism and related services [3], and the country plans to increase annual foreign visitor numbers to 20 million [34]. However, the regional food service sector has rarely been analysed on the basis of current official statistics, which makes it difficult to assess its real state and the direction of its development.

Thus, the scientific problem lies in the contradiction between the rapidly growing importance of food service establishments for the economy and tourism of the Samarkand region and the insufficient analytical basis for managing their development.

The aim of the study is to assess the development status and trends of food service establishments in the Samarkand region and to substantiate directions for their further development. To achieve this aim, the following *objectives* were set: (1) to review theoretical and empirical approaches to the analysis of food service and food tourism; (2) to analyse the dynamics and structure of accommodation and food services in the region in 2017-2025; (3) to assess the regional specialization, the density and average size of enterprises and the role of tourism demand; (4) to identify the main development trends and to propose directions for the development of the sector.

The object of the research is the food service sector of the Samarkand region. *The subject* is the set of economic indicators and factors that characterize the state and development of food service establishments. *The hypothesis* of the study is that the growth of the food service sector in the Samarkand region is driven primarily by the combination of population growth and tourism demand, which leads to increasing regional specialization and to consolidation of the sector rather than to an increase in the number of enterprises.

The scientific novelty of the research consists in the following: the dynamics and structural position of accommodation and food services in the Samarkand region have been analysed on the basis of the latest official data for 2017-2025; the location quotient has been applied to measure the regional specialization of the sector; indicators of enterprise density, average volume per enterprise and per capita consumption have been compared with national values; and the main development trends of food service establishments in the region have been systematized.

LITERATURE REVIEW

The literature relevant to the topic can be grouped into five streams: hospitality marketing and service quality; restaurant choice and customer satisfaction; food tourism; the evolution of destinations and their vulnerability to shocks; and regional studies of food service in Uzbekistan.

Hospitality marketing and service quality. P. Kotler, J. Bowen, J. Makens and S. Baloglu consider food service as part of the hospitality industry, in which the product combines tangible elements - food and beverages - with intangible elements such as atmosphere and service, and in which customer experience determines repeat visits and word-of-mouth [12]. A. Parasuraman, V. Zeithaml and L. Berry developed the SERVQUAL model, which measures service quality through reliability, responsiveness, assurance, empathy and tangibles [26]. This model has been widely adapted to restaurants and remains a standard tool for assessing the quality of service. However, these works focus on the level of individual enterprises and do not provide tools for analysing the

development of the sector at the regional level.

Restaurant choice and satisfaction. Y. Namkung and S. Jang showed that food quality is a key determinant of customer satisfaction and behavioural intentions in restaurants, with presentation, taste and freshness being particularly important [13]. K. Ryu, H.-R. Lee and W. Kim found that the quality of the physical environment, food and service jointly influence restaurant image, perceived value, satisfaction and behavioural intentions [29]. These studies indicate that the competitiveness of food service establishments depends on a combination of product, environment and service, which is relevant for Samarkand, where the historical atmosphere of the city is itself part of the dining experience. At the same time, they are based on samples from developed markets with established restaurant cultures.

Food tourism. C. M. Hall and co-authors demonstrated that food tourism, in which the desire to experience local food is an important motive for travel, has become a distinct form of tourism and a tool of regional development [9]. S. Everett and C. Aitchison showed, using the example of Cornwall, that food tourism can help to sustain regional identity, support local producers and extend the tourist season [7]. Y. Kim, A. Eves and C. Scarles proposed a model of local food consumption during trips, in which motivational factors - exciting experience, escape from routine, health concerns, learning and authenticity - interact with demographic and physiological factors [11]. These works suggest that national cuisine can be a competitive advantage of Samarkand, but they pay little attention to the statistical analysis of the food service sector itself. Moreover, most of the empirical evidence on food tourism comes from Western Europe, North America and East Asia, where the restaurant sector is highly formalized and statistical data on it are detailed. In Central Asian destinations, where family-run establishments and informal activity play a much larger role, the mechanisms through which food tourism affects the local economy may differ, and they remain little studied.

Destination evolution and shocks. R. Butler proposed the concept of the tourist area life cycle, according to which destinations pass through stages of exploration, involvement, development, consolidation and stagnation, after which they either decline or rejuvenate [1]. This concept is useful for understanding the development of services in a rapidly growing destination such as Samarkand. S. Gössling, D. Scott and C. M. Hall, analysing the COVID-19 pandemic, showed how vulnerable tourism and related services are to global shocks [8]; for food service establishments, this means that dependence on tourist demand must be balanced by local demand.

Digital channels. A. Ray, A. Dhir, P. Bala and P. Kaur studied the motives for using food delivery applications and found that convenience, ease of use, choice of restaurants and customer experience play an important role [28]. The spread of delivery services changes the structure of the food service market, increasing the importance of off-premises sales, especially in large cities. This trend is also visible in Uzbekistan, although regional data on it are scarce.

Regional studies of Samarkand. In the national literature, Z. Ravshanov analysed the productivity of catering services in the Samarkand region and found that restaurants were the most productive type of establishment, with higher cost-effectiveness and profitability than cafes and canteens [27]. K. Ibodov applied the BCG matrix to the services of a restaurant in Samarkand and identified national cuisine, catering and banquet services as its strongest segments [10]. A. Siddikov proposed a mechanism for implementing an innovation development strategy for the catering sector of the region, including technological modernization and the creation of a gastronomic cluster [30]. These studies provide valuable insights into enterprise-level performance and strategy, but they were based on data before the recent tourism boom and do not analyse the regional sector as a whole.

Economic role of food service in regional development. From the standpoint of regional economics, food service belongs to the sectors that serve both local consumption and external demand. In regions with significant tourist flows, it becomes a part of the export base: the money spent by visitors in restaurants and cafes is income brought into the region from outside, which then circulates through the local economy via wages, purchases of food products and services of suppliers. This makes food service an important link between tourism and local agriculture, food processing

and trade. At the same time, the sector has a low entry threshold, which leads to a large number of small enterprises, high turnover of firms and a considerable share of informal activity. Analysing such a sector requires indicators that capture not only its scale but also its relative importance for the regional economy and its organizational structure; the location quotient, widely used in regional analysis to measure specialization, and indicators of enterprise density and average size meet this requirement.

Determinants of development of food service establishments. The literature makes it possible to identify several groups of factors that determine the development of the sector. Demand-side factors include population size and income, urbanization, changes in lifestyle and the growth of eating out, as well as the volume and structure of tourist flows. Supply-side factors include the availability of premises and infrastructure, access to finance, the qualifications of personnel, the quality of food products and the development of supply chains. Institutional factors include the regulation of opening and operating establishments, sanitary and quality standards, taxation and the level of informality. Finally, technological factors - digital platforms, delivery services, electronic payments - change the way establishments reach customers. The relative importance of these factors differs between regions, which is why regional studies are needed to understand the specific situation of each destination. In historical cities such as Samarkand, an additional factor is the cultural environment: the proximity of monuments, the preservation of traditional architecture and the authenticity of the urban landscape increase the attractiveness of establishments located in the historical centre, but also impose restrictions on construction and on the formats of activity. Thus, the development of food service in such cities depends not only on market forces but also on urban planning and heritage protection policies, which must balance the interests of entrepreneurs, residents and visitors. These features make the analysis of the sector in the Samarkand region particularly relevant and require combining economic indicators with an understanding of the tourist and cultural context.

Critical comparison. The research streams reviewed complement each other: hospitality and restaurant studies explain the determinants of competitiveness at the level of establishments, food tourism research shows how food service contributes to the attractiveness of a region, the life cycle and shock literature explains the risks of rapid growth, and regional studies describe the local context. Their common limitation is that they rarely combine macro-level statistical analysis of the sector with an assessment of its specialization and structure in a specific region. A comparative summary is presented in Table 1.

Table 1

Comparison of research streams relevant to the analysis of food service establishments

Research stream	Key authors	Main contribution	Limitation for the Samarkand region
Hospitality marketing and service quality	Kotler et al. [12]; Parasuraman et al. [26]	Marketing of hospitality services; dimensions of service quality	Enterprise level; no regional analysis
Restaurant choice and satisfaction	Namkung, Jang [13]; Ryu et al. [29]	Role of food quality, physical environment and service	Developed-market samples
Food tourism	Hall et al. [9]; Everett, Aitchison [7]; Kim et al. [11]	Food as attraction and element of regional identity	Little attention to statistics of the sector
Destination evolution and shocks	Butler [1]; Gössling et al. [8]	Life cycle of destinations; vulnerability to shocks	Not specific to food service
Digital channels	Ray et al. [28]	Motives for using food delivery apps	Urban consumer markets
Regional studies of Samarkand	Ravshanov [27]; Ibodov [10]; Siddikov [30]	Productivity, product portfolio, development strategy of catering	Enterprise cases; limited use of recent regional data

Thus, the analysis of the literature reveals a research gap: there is no comprehensive analysis of the development status and trends of food service establishments in the Samarkand region based on current official statistics that assesses the scale, specialization and structure of the sector and links them with tourism demand. The present study aims to fill this gap.

METHODOLOGY

The research was designed as a descriptive and analytical study based on secondary statistical data. This design was chosen because the aim was to characterize the state and trends of the sector as a whole, for which official statistics provide the most complete and comparable information.

Data. The main source was the open data portal of the National Statistics Committee (SIAT), from which annual data on the volume of accommodation and food services for the country and the Samarkand region [24] and on the volume of market services by type of activity in the Samarkand region [25] for 2017-2025 were obtained. These data were supplemented by official information on the number of business entities in the sector by region [16, 20], on the structure of market services [19, 18], on the population [14, 37, 21] and on catering enterprises and turnover [2, 22]. Information on tourist flows and tourism projects was taken from official and media sources [35, 38, 5, 6, 4, 36, 33]. The analysis began in 2017 because the statistical series were revised from that year onwards; the official volume of accommodation and food services includes an estimate of the shadow economy [19].

Indicators. The following indicators were calculated. The nominal growth rate and the compound annual growth rate:

$$CAGR = (V_T / V_0)^{1/T} - 1 , \quad (1)$$

where V_0 and V_T are the volumes of services in the initial and final years and T is the number of years. The share of the sector in regional market services and the share of the region in the national volume of the sector were calculated as simple ratios. Regional specialization was measured by the location quotient:

$$LQ = (V_r / S_r) / (V_n / S_n) , \quad (2)$$

where V_r and V_n are the volumes of accommodation and food services in the region and the country; S_r and S_n are the total volumes of market services. A value of LQ above one indicates that the region is more specialized in the sector than the country as a whole. In addition, the volume of services per capita (using the average annual population), the number of business entities per 10,000 inhabitants and the average volume of services per business entity were calculated:

$$v_{pc} = V_r / N_r , \quad d = E_r / N_r \cdot 10\,000 , \quad v_e = V_r / E_r , \quad (3)$$

where N_r is the population and E_r is the number of business entities. The role of tourism demand was assessed by the ratio of tourism services exports of the region, converted into soums at an average exchange rate of 12,500 UZS/USD, to the volume of accommodation and food services. Since tourism exports include spending on transport, shopping and other services, this ratio is an upper-bound indicator of the importance of foreign tourist demand.

The national share of accommodation and food services in market services was taken from the official releases (22.4% for 2024 and 21.6% for 2025) [19, 18], while the regional share was calculated from the sum of the types of market services in the SIAT table. Because the values are given at current prices, the growth rates in soums reflect both real growth and inflation; to separate them, official real growth indices were used where available. The number of business entities refers to different dates (1 January 2024 and 1 March 2025), which was taken into account when interpreting the results.

The choice of indicators was guided by three considerations. First, they must be calculable from official data that are regularly published, so that the analysis can be repeated in subsequent years. Second, they must characterize different aspects of the sector - its scale, dynamics, place in the regional economy, organizational structure and dependence on tourism. Third, they must allow comparison with national values, which makes it possible to distinguish regional features from general trends in the country. The location quotient was chosen as a simple and widely used measure

of specialization that does not require data on employment, which are not available for the sector at the regional level. The average volume per business entity was used as an indicator of the scale of enterprises and, indirectly, of consolidation. The per capita indicator was calculated using the average of the population at the beginning and end of the year, which corresponds to the usual practice of statistical analysis and reduces the effect of population growth within the year on the result. *Analysis of trends.* Qualitative trends were identified by systematizing official information, industry publications and the findings of previous studies and were grouped into demand-side, supply-side and institutional trends. On this basis, the main strengths, weaknesses, opportunities and threats of the sector were summarized. The research was carried out in four stages: collection and verification of data; calculation of indicators; comparative and structural analysis; and identification of trends and development directions. Calculations were performed in Python 3. To ensure reproducibility, all calculated indicators are presented together with the source data in the tables of the next section, and the sources of the original data are indicated in the notes to the tables. The limitations associated with the use of nominal values, the inclusion of informal activity in the statistics and the combination of accommodation and food services in one indicator were taken into account when interpreting the results.

ANALYSIS AND RESULTS

The dynamics of accommodation and food services in the Samarkand region are presented in Table 2 and Figure 1.

Table 2

Dynamics of accommodation and food services in the Samarkand region, 2017-2025

Year	Volume, bln UZS	Growth, %	Share in regional market services, %	Share in national volume of the sector, %
2017	1,829.5	-	12.7	5.8
2018	2,599.0	42.1	15.4	6.8
2019	3,883.3	49.4	17.8	7.7
2020	4,002.3	3.1	17.2	7.6
2021	6,736.5	68.3	21.2	9.3
2022	10,574.3	57.0	25.4	9.7
2023	15,814.4	49.6	29.2	10.8
2024	20,339.9	28.6	28.8	11.0
2025	26,197.6	28.8	29.5	11.5
CAGR 2017-2025, %	39.5	-	-	-

Table 2 and Figure 1 illustrate the dynamics of accommodation and food services in the Samarkand region during 2017–2025, highlighting substantial growth in service volumes and the increasing importance of this sector in both regional and national markets. Over the analyzed period, the volume of accommodation and food services increased from UZS 1,829.5 billion in 2017 to UZS 26,197.6 billion in 2025, representing approximately a 14.3-fold expansion. The compound annual growth rate (CAGR) reached 39.5%, indicating a sustained upward trend in the nominal value of services provided.

The dynamics demonstrate considerable differences in annual growth rates. During 2018–2019, the sector expanded rapidly, recording growth of 42.1% and 49.4%, respectively. However, in 2020, growth slowed sharply to 3.1%, indicating a period of significant disruption. A strong recovery followed in 2021 and 2022, when annual growth reached 68.3% and 57.0%, respectively. Although the growth rate subsequently moderated to 49.6% in 2023, 28.6% in 2024, and 28.8% in 2025, the absolute volume of services continued to increase, suggesting continued sectoral expansion.

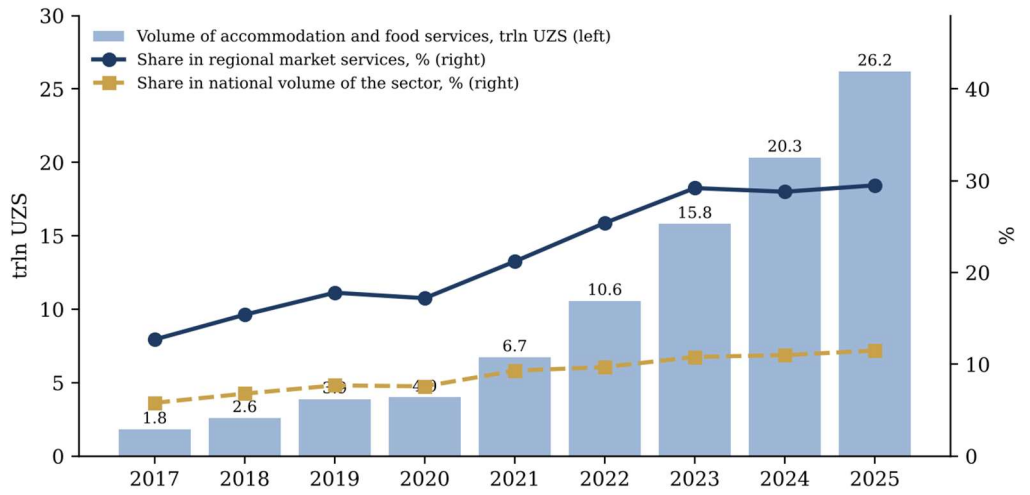

Figure 1. Volume and shares of accommodation and food services in the Samarkand region, 2017-2025

In 2017-2025 the volume of the sector in the region increased 14.3 times in nominal terms, with an average annual rate of 39.5%, compared with 28.0% for the country. The only year of low growth was 2020 (3.1%). Total market services in the region grew at an average annual rate of 25.5%, and the share of accommodation and food services in them more than doubled. In 2023 the region recorded the highest real growth rate of these services among all regions, 130.9% [17]. In January-August 2026 the volume of the sector in the region reached 20.5 trillion soums, or 11.8% of the national total [23].

The structure of market services in the region and the growth rates of their main types are presented in Table 3.

Table 3

Structure of market services in the Samarkand region, 2017 and 2025

Type of services	2017, bln UZS	2025, bln UZS	Share 2017 → 2025, %	CAGR, %
Accommodation and food services	1,829.5	26,197.6	12.7 → 29.5	39.5
Trade	5,498.4	23,193.1	38.1 → 26.1	19.7
Transportation and storage	3,253.6	14,849.6	22.5 → 16.7	20.9
Financial and insurance	654.0	6,966.5	4.5 → 7.9	34.4
Education	518.9	3,197.9	3.6 → 3.6	25.5
Information and communication	592.6	2,761.7	4.1 → 3.1	21.2
Other types	2,102.8	11,558.0	14.6 → 13.0	23.7
Total market services	14,449.8	88,724.4	100.0	25.5

An important structural change is reflected in the growing contribution of accommodation and food services to the regional services market. Their share increased from 12.7% in 2017 to 29.5% in 2025, representing an increase of 16.8 percentage points. Despite a slight decline from 29.2% in 2023 to 28.8% in 2024, the indicator recovered in 2025, reaching its highest level during the analyzed period. Simultaneously, the Samarkand region's share in the national volume of accommodation and food services increased from 5.8% to 11.5%, demonstrating the strengthening position of the region within Uzbekistan's hospitality and food service industry.

Accommodation and food services had the highest growth rate among all types of services and in 2025 became the largest type of market services in the region, ahead of trade, whose share decreased from 38.1% to 26.1%.

The position of the Samarkand region among regions in 2025 is shown in Figure 2, and the structural indicators in Table 4.

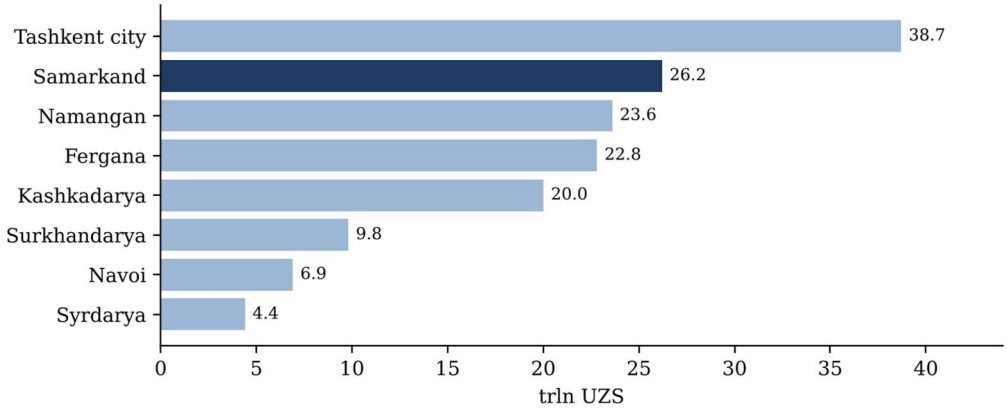

Figure 2. Volume of accommodation and food services in selected regions of Uzbekistan in 2025, trln UZS

Overall, the findings indicate that accommodation and food services have become an increasingly significant component of the Samarkand region's service economy. The simultaneous expansion of service volumes, regional market share, and contribution to national sectoral output suggests substantial opportunities for further development of hospitality infrastructure, investment attraction, service quality improvement, and market diversification. Nevertheless, the observed growth in nominal monetary indicators should be distinguished from real output growth, since changes in prices may also influence the reported dynamics. These results provide an empirical basis for assessing the sector's structural transformation and formulating strategic priorities for its sustainable development.

Table 4

Structural indicators of the food service sector of the Samarkand region compared with Uzbekistan

Indicator	Region 2024	Region 2025	Country 2024	Country 2025
Share of the sector in market services, %	28.8	29.5	22.4	21.6
Location quotient (LQ)	1.28	1.37	1.00	1.00
Volume per capita, thous. UZS	4,782	6,038	4,974	6,018
Business entities, units*	3,363	3,117	28,277	27,166
Business entities per 10,000 inhabitants*	8.0	7.2	7.7	7.2
Average volume per business entity, bln UZS*	6.05	8.40	6.53	8.40

The Samarkand region ranked second after Tashkent city in the volume of the sector in 2025. Its location quotient exceeded one and increased from 1.28 to 1.37. Per capita volume was slightly below the national level in 2024 and equal to it in 2025. The number of business entities in the region decreased by 7.3% (nationally by 3.9%), while the average volume per entity increased by 39%. At the national level, 26,390 commercial enterprises operated in public catering, with a turnover of 237.6 trillion soums in 2025 [2]; as of 1 October 2025, 117 of 25,589 catering enterprises were large [22].

The main indicators of tourism demand relevant to food service in the region are summarized in Table 5.

Table 5

Indicators of tourism demand in the Samarkand region

Indicator	Value
Foreign tourists, January-November 2025	more than 3 mln [35]
Domestic tourists, January-November 2025 (2024: 5 mln)	5.5 mln [35, 38]

Average length of stay	increased from 2.5 to 3 days [35]
Tourism services exports, January-November 2025	USD 606 mln [35]
Tourism exports to volume of the sector (at 12,500 UZS/USD)	≈29%
Visitors to Samarkand State Museum-Reserve / Registan, 2025	1,145,595 / 1,136,069 [36]
Foreign tourist trips to Uzbekistan, 2023-2025	6.63 → 7.96 → 11.68 mln [5]

Nationally, in January-August 2025, visits to relatives accounted for 5.17 million of the 7.5 million recorded arrivals, and travel for 1.15 million [6]. The Silk Road Samarkand international tourist centre covers 260 hectares, and its central ethnographic park occupies 11 hectares [4]; the restaurants of the complex include venues of national cuisine with a capacity of 400-500 guests [31]. The Tourism Committee reported a noticeable increase in interest in gastronomic tourism [33].

The main trends identified are systematized in Table 6.

Table 6

Main development trends of food service establishments in the Samarkand region

Group	Trend	Evidence
Demand	Rapid growth of demand from residents and visitors	CAGR 39.5%; population 4.38 mln; 8.5 mln tourists in 11 months of 2025
Demand	Longer stays and interest in gastronomic experiences	Stay from 2.5 to 3 days; growing gastronomic tourism
Supply	Consolidation and growth in average size	Entities −7.3%; volume per entity +39%
Supply	Emergence of large themed and resort-based venues	Silk Road Samarkand complex, restaurants for 400-500 guests
Structure	Increasing regional specialization	LQ 1.28 → 1.37; sector is the largest type of services
Institutional	Persisting informality and small scale	Statistics include shadow economy; few large enterprises

Table 6 summarizes the main development trends of food service establishments in the Samarkand region, highlighting changes in consumer demand, market supply, sectoral specialization, and institutional conditions. The findings indicate that the regional food service industry is undergoing substantial structural transformation, driven by the expansion of domestic consumption, increasing tourist arrivals, and the development of hospitality infrastructure.

From the demand perspective, the sector demonstrates considerable growth potential. The compound annual growth rate (CAGR) of accommodation and food services reached 39.5% during 2017–2025, while the regional population of approximately 4.38 million provides a substantial domestic consumer base. Additionally, the reported arrival of 8.5 million tourists during the first eleven months of 2025 indicates the importance of tourism-related demand. The increase in average visitor stays from 2.5 to 3 days, accompanied by growing interest in gastronomic experiences, creates additional opportunities for restaurants, traditional dining establishments, and specialized food service providers.

On the supply side, the industry is characterized by consolidation and an increase in the average economic scale of operating establishments. Despite a 7.3% reduction in the number of business entities, service volume per entity increased by 39%, suggesting a concentration of economic activity among fewer but relatively larger operators. The emergence of large themed restaurants and resort-based dining facilities, particularly within the Silk Road Samarkand complex, further illustrates the development of higher-capacity establishments capable of accommodating approximately 400–500 guests.

DISCUSSION

The results make it possible to answer the research questions formulated in the introduction. First, the analysis showed that the food service sector of the Samarkand region has grown much faster than both the regional service sector and the national food service sector. The average annual growth rate of almost 40% in nominal terms, compared with 28% nationally, and the increase of the region's share in the national sector from 5.8% to 11.5% indicate that the region has become one of the main centres of food service in the country. Even taking into account inflation and the revision of statistical methods, the high real growth rates reported for the region, including the highest growth among all regions in 2023, confirm that this is not only a price effect.

Second, the location quotient shows that the region is increasingly specialized in accommodation and food services. With an LQ of 1.37 in 2025, the share of the sector in the regional service economy is more than one third higher than in the country as a whole. This specialization is consistent with the concept of food tourism developed by C. M. Hall and co-authors [9]: in historical destinations, food service becomes part of the tourist product and an important channel through which tourist spending enters the local economy. At the same time, the fact that per capita volume in the region is close to the national average suggests that local demand from the large population of the region remains the main base of the sector, and that tourism adds to it rather than replaces it.

Third, the decline in the number of business entities combined with the rapid growth of volume indicates a process of consolidation. The average volume per entity increased by almost 40% in a little over a year, and the largest projects in the region are large complexes with restaurants for several hundred guests. This corresponds to the stage of development in the tourist area life cycle described by R. Butler [1], in which larger and more professional operators enter the destination. Consolidation can increase the quality and efficiency of services, in line with the finding of Z. Ravshanov that restaurants are more productive than cafes and canteens [27], but it also creates pressure on small family establishments, which form the traditional basis of the sector. It should also be noted that part of the decline in the number of registered entities may reflect the re-registration and closure of inactive firms rather than the actual disappearance of establishments.

Fourth, the analysis of tourism demand shows that foreign tourists are important but not dominant consumers of food services in the region. The ratio of tourism exports to the volume of the sector, even as an upper-bound estimate, is about 29%, which means that most of the demand comes from residents and domestic visitors. Moreover, a large part of foreign arrivals to the country consists of visits to relatives from neighbouring countries, whose spending patterns differ from those of long-haul leisure tourists. This finding is important for the strategies of establishments: those located in the historical centre and in tourist complexes can focus on international tourists and gastronomic experiences, while most establishments in the region must continue to serve local demand, where price, convenience and traditional cuisine are decisive. The experience of the COVID-19 pandemic, analysed by S. Gössling and co-authors [8], confirms that a balanced customer base reduces vulnerability to shocks in international tourism.

Fifth, the increase in the average length of stay of tourists and the growing interest in gastronomic tourism create opportunities for the development of new formats. According to the model of Y. Kim, A. Eves and C. Scarles [11], tourists seek authentic and exciting food experiences; Samarkand, with its distinctive bread, pilaf and other dishes, has the resources to meet this demand. The experience of Cornwall described by S. Everett and C. Aitchison [7] shows that food tourism can strengthen regional identity and link food service establishments with local agriculture and crafts. For the region, this means the development of gastronomic routes, cooking master classes, food festivals and the certification of traditional dishes, as well as the creation of a gastronomic cluster proposed by A. Siddikov [30].

Sixth, the growth of the sector raises the question of quality. Studies of restaurant customers show that food quality, the physical environment and service jointly determine satisfaction and loyalty [13, 29], and the SERVQUAL framework [26] provides tools for measuring service quality. In a sector consisting mainly of small enterprises, a significant part of which operates informally,

quality varies widely, and the reputation of the destination can suffer from poor experiences in individual establishments. Regional quality standards, training of personnel, hygiene control and transparent customer rating systems are therefore necessary conditions for sustainable development. The experience of the portfolio approach described by K. Ibodov [10] also shows that establishments can increase their resilience by combining restaurant service with banquets, catering and events.

Seventh, digitalization is becoming an important trend. The spread of online maps, reviews and food delivery applications, the motives for whose use were analysed by A. Ray and co-authors [28], changes the way consumers choose establishments and increases competition. For food service establishments in the region, the presence on digital platforms, online booking and delivery services are becoming necessary tools for reaching both residents and tourists. Digital payment and fiscal systems also contribute to the formalization of the sector, and data from online platforms can become an additional source of information on the number, location and quality of establishments, which official statistics currently do not fully capture.

The structural shift within the regional service sector also deserves attention. The fact that accommodation and food services have overtaken trade as the largest type of market services shows that the economy of the region is changing: consumption increasingly takes the form of services and experiences rather than purchases of goods. This trend, typical of developed service economies, means that the food service sector will play an increasing role in regional employment and income. At the same time, it creates a risk of excessive dependence on one sector, especially if its growth is driven by tourism, which is sensitive to external shocks. A balanced development strategy should therefore combine the support of food service with the development of related sectors - food processing, agriculture, crafts and creative industries - which supply the sector and benefit from its growth.

The results also make it possible to assess the stage of development of the sector. The combination of very high growth rates, increasing specialization and consolidation suggests that the food service sector of the region is moving from the stage of rapid expansion to a more mature stage in which competition intensifies and the quality of services becomes the main competitive factor. In terms of the tourist area life cycle [1], the destination is in a phase of development, in which the main risk is not a lack of demand but the deterioration of quality and authenticity under the pressure of rapid growth. Experience of other historical destinations shows that the overcommercialization of historical centres, the replacement of local establishments by standardized chains and rising prices can reduce the attractiveness of the destination for both tourists and residents. Preventing these risks requires a deliberate policy of preserving the authenticity of the gastronomic environment, supporting family and traditional establishments and maintaining a balance between tourist and local demand.

The territorial distribution of food service establishments within the region is another issue. Most of the tourist flows and large establishments are concentrated in the city of Samarkand and its surroundings, while the districts of the region rely mainly on local demand. Expanding tourist routes to the districts, developing roadside and rural food service, and promoting local specialties of different districts could help to distribute the benefits of tourism more evenly across the region. This is consistent with the national trend of tourists travelling beyond the classic routes and with the potential of food tourism to support rural areas.

Finally, the findings have implications for regional policy. The growth of the sector should be supported by infrastructure in tourist zones, simplified procedures for opening establishments, access to finance for small enterprises and incentives for formalization. At the same time, the planning of large tourist complexes should take into account their effect on existing establishments and should seek to integrate small local businesses into tourist flows rather than displace them.

The hypothesis of the study is confirmed: the growth of the food service sector in the region is driven by the combination of a large and growing population and tourism demand, and it is accompanied by increasing specialization and consolidation rather than an increase in the number of enterprises.

The study has several limitations. The official statistics combine accommodation and food

services, so the analysis cannot separate restaurants and cafes from hotels; the values are given at current prices and include estimates of the shadow economy; the number of business entities refers to different dates; and the share of tourism demand was estimated using tourism exports, which include other spending. Field surveys of establishments and consumers would make it possible to verify and deepen the results.

CONCLUSION

The study analysed the development status and trends of food service establishments in the Samarkand region. It was established that in 2017-2025 the volume of accommodation and food services in the region increased from 1.8 to 26.2 trillion soums, growing faster than the regional service sector and the national food service sector, that the region's share in the national sector doubled to 11.5%, and that the location quotient increased to 1.37. The number of business entities decreased, while the average volume per entity increased, which indicates consolidation of the sector. Foreign tourism is an important but not dominant source of demand. The research hypothesis was confirmed.

The practical significance of the study lies in the system of indicators - growth, share, location quotient, per capita and per entity volumes and the tourism demand ratio - that can be used by regional authorities and business associations to monitor the sector, and in the directions for development identified. It is recommended to introduce regional quality standards and training programmes for food service personnel; to develop gastronomic tourism through routes, festivals, certification of traditional dishes and a gastronomic cluster; to support the digitalization of establishments and the use of online booking and delivery; to stimulate the formalization of small establishments through simplified procedures and access to finance; and to integrate small local businesses into the tourist flows of large complexes.

The implementation of these measures will make it possible to increase the contribution of food service establishments to regional income and employment, to improve the image of Samarkand as a gastronomic destination and to reduce the vulnerability of the sector to fluctuations in tourist demand by strengthening its links with the local economy and the population of the region. Regular monitoring of the indicators proposed in this study will allow regional authorities to identify problems at an early stage and to adjust support measures in a timely manner.

Thus, the food service sector of the Samarkand region has moved from a stage of rapid quantitative growth to a stage in which quality, specialization and consolidation become the main drivers of development. The contribution of the study consists in providing a quantitative picture of this transition on the basis of official statistics. Future research should focus on surveys of establishments and consumers to assess service quality and customer expectations, on the separation of food service from accommodation in regional statistics and on the analysis of the effects of large tourist complexes on local businesses.

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