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Article

Development of the Road Transport Services Market in Uzbekistan: A Structural and Dynamic Analysis

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Abstract: The road transport services market plays a strategically important role in ensuring economic mobility, territorial connectivity, freight circulation and passenger transportation in Uzbekistan. The purpose of this study is to assess the current state, structural changes and development dynamics of the road transport services market and to identify major territorial and infrastructural factors affecting its development. The research applies comparative, structural and dynamic analysis, statistical grouping, index analysis, and regional infrastructure assessment using Engel and Uspensky coefficients. Official statistical data for 2016-2025 constitute the empirical basis. The results show that road transport remains the dominant segment of the national transport services market. In 2025, total transport services reached approximately UZS 188.3 trillion, while road transport services amounted to about UZS 95.9 trillion, or 50.9% of the total. The annual growth rate of road transport services reached 114.2%, exceeding the overall transport services growth rate of 110.8%. The regional analysis also reveals substantial disparities in road infrastructure provision. The study concludes that future competitiveness depends not only on quantitative expansion but also on infrastructure modernization, territorial accessibility, digitalization, service quality and more efficient coordination between transport demand and supply.

Keywords: *road transport, transport services market, transport infrastructure, structural analysis, dynamic analysis, freight transportation, passenger transportation, regional development, transport accessibility, Uzbekistan.*

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1. Introduction

Transport is one of the fundamental infrastructure sectors of a national economy. Its economic importance is determined not only by the physical movement of passengers and goods, but also by its contribution to market integration, territorial specialization, mobility of production factors, domestic and foreign trade, tourism and the development of other service industries.[1]

In the conditions of economic modernization in Uzbekistan, the role of transport services is increasing. Expansion of domestic markets, development of entrepreneurship, growth of interregional economic relations, e-commerce and international trade generate additional demand for reliable, affordable and flexible transport services.[2]

Road transport occupies a particularly important position because of its high mobility, territorial accessibility, flexible routing and ability to provide door-to-door transportation. These characteristics allow road transport to connect urban centers, rural

territories, industrial zones and logistics nodes and to serve as the final link of multimodal supply chains.

The relevance of the study is reinforced by recent structural changes in Uzbekistan's service economy. The service sector has expanded, while transport-related activities have demonstrated strong post-pandemic recovery. At the same time, development remains spatially uneven because road network density, population concentration, territorial size, economic specialization, logistics infrastructure and transit potential differ significantly across regions.[3]

The purpose of the study is to assess the development of the road transport services market in Uzbekistan through structural and dynamic analysis and to identify the main trends, regional disparities and priority directions for further development.

Transport market research is closely connected with theories of infrastructure development, spatial economics, service markets and regional development. Efficient transport systems reduce logistics and transaction costs, increase market accessibility and support territorial specialization.[4]

Road transport is distinguished by flexibility, accessibility and relatively high delivery speed over short and medium distances. At the same time, its competitiveness depends on road quality, congestion, operating costs, vehicle fleet condition, safety, environmental requirements, service quality and digitalization.

Recent international transport research increasingly emphasizes connectivity, multimodal integration, resilience, digital technologies and the relationship between infrastructure quality and regional economic performance. For Uzbekistan, these issues are especially important because of the country's geographical position, uneven regional settlement patterns and the growing role of international transport corridors.[5]

The present study contributes to this discussion by combining three analytical dimensions - structural change, long-term dynamics and territorial infrastructure differentiation - within a single assessment of Uzbekistan's road transport services market.

2. Materials And Methods

The empirical basis of the research consists of official statistical data of the Republic of Uzbekistan for 2016-2025, including data on transport services, road transport services, gross domestic product and regional road infrastructure. The dissertation dataset compiled from the National Statistics Committee and SIAT open data is used as the principal source for the time-series and regional analysis.[6]

Dynamic analysis is used to assess annual changes in transport and road transport services. Structural analysis determines the role of road transport within the overall transport services market. Comparative analysis identifies differences between periods and regions. Regional transport infrastructure provision is evaluated using Engel and Uspensky coefficients and road-network-density indicators.

$$G_t = (V_t / V_{t-1}) \times 100$$

where G_t is the growth rate in year t, V_t is the value of the indicator in the current year, and V_{t-1} is its value in the previous year.

$$S_r = (V_r / V_t) \times 100$$

where S_r is the share of road transport services, V_r is the volume of road transport services, and V_t is the total volume of transport services.[7].

3. Results

1. Dynamics of the road transport services market

The Table 1. analysis identifies several stages in the development of Uzbekistan's transport services market during 2016-2025. The long-term trajectory was generally positive, but the COVID-19 shock caused a sharp decline in 2020 followed by rapid recovery.[8]

Table 1. Growth rates of transport and road transport services in Uzbekistan, 2016-2025 (% of previous year)

Year	Transport services, total	Road transport services
2016	107.8	117.2
2017	109.9	102.1
2018	105.0	102.9
2019	107.6	108.0
2020	87.4	92.2
2021	117.6	117.8
2022	110.6	106.7
2023	107.2	106.9
2024	109.9	112.1
2025	110.8	114.2

Source: compiled by the author based on the National Statistics Committee of the Republic of Uzbekistan and SIAT official statistics.

The most significant shock occurred in 2020, when the total transport services index fell to 87.4% and the road transport services index to 92.2%. Mobility restrictions and reduced economic activity affected both passenger and freight flows.[9]

The recovery was rapid: road transport services reached 117.8% in 2021. Growth remained positive thereafter and accelerated from 106.9% in 2023 to 112.1% in 2024 and 114.2% in 2025. This indicates a new stage of market expansion associated with domestic mobility, trade and logistics demand.

2. Structural position of road transport

Table 2. Road transport is the largest segment of the national transport services market. In 2025, total transport services reached approximately UZS 188.3 trillion, of which road transport services accounted for about UZS 95.9 trillion, or 50.9%.[10]

Table 2. Key indicators of the transport services market in Uzbekistan, 2025

Indicator	Value
Total transport services	UZS 188.3 trillion
Road transport services	UZS 95.9 trillion
Share of road transport	50.9%
Growth of total transport services	110.8%
Growth of road transport services	114.2%

Source: National Statistics Committee of the Republic of Uzbekistan; author's compilation.

The combination of the largest market share and an above-average growth rate confirms that road transport was one of the principal drivers of transport-services expansion in 2025.

3. Freight mobility and structural transformation

In 2025, all modes of transport in Uzbekistan carried approximately 1.601 billion tons of freight, while road transport accounted for approximately 1.4345 billion tons. Road freight turnover reached about 26.1 billion ton-km. These indicators demonstrate the central role of road transport in the physical movement of goods, particularly over short and medium distances and in first- and last-mile logistics.[11]

The expansion of road transport is occurring within a broader transformation of the service economy. The share of services in GDP increased from 42.0% in 2016 to 46.5% in 2025. The combined share of transportation and storage, information and communication activities fell during the pandemic period and subsequently recovered to 8.1% in 2025.

4. Regional differentiation of road infrastructure

Table 3. Regional analysis shows substantial differences in relative road-infrastructure provision. The dissertation calculations based on Engel and Uspensky coefficients indicate that infrastructure availability depends on the interaction of road length, territorial size, population and regional economic functions.[12]

Table 3. Selected regional indicators of public road infrastructure provision

Region	Engel coefficient	Uspensky coefficient	Relative position
Navoi	0.97	0.94	Very high
Tashkent region	0.92	0.89	High
Fergana	0.89	0.85	High
Karakalpakstan	0.84	0.81	Above average
Syrdarya	0.79	0.76	Above average
Bukhara	0.75	0.72	Medium-high
Kashkadarya	0.72	0.69	Medium
Samarkand	0.70	0.67	Medium
Jizzakh	0.68	0.65	Medium
Surkhandarya	0.66	0.63	Relatively low
Khorezm	0.64	0.61	Relatively low
Namangan	0.61	0.58	Low
Andijan	0.59	0.56	Low

Source: author's calculations based on official regional road-network statistics used in the dissertation.

Navoi and Tashkent regions show relatively high infrastructure provision, reflecting their territorial, industrial and transit-logistics characteristics. Fergana also demonstrates a comparatively high position because of dense settlement and intensive interregional economic relations.

Lower relative indicators in Andijan, Namangan and Khorezm indicate that high population density and growing traffic intensity can create pressure on existing infrastructure. Consequently, absolute road length alone is insufficient for regional transport assessment.[13]

4. Discussion

The findings demonstrate that road transport has become the structural core of Uzbekistan's transport services market. Its 50.9% share means that changes in road

transport efficiency directly affect the overall performance of the national transport-services sector.

The market also demonstrates resilience. The 2020 decline was followed by a rapid recovery, and the road transport services growth rate reached 114.2% by 2025. However, quantitative growth does not automatically remove structural constraints. Regional disparities in infrastructure provision remain significant.[14]

Future competition among road transport providers will increasingly depend on service quality, delivery time, reliability, safety, digital interaction with customers, logistics integration and cost efficiency. At the national level, road transport should be developed in coordination with railway, air and logistics-terminal infrastructure to strengthen multimodal connectivity.[15]

The results suggest that the market is shaped by four interconnected groups of factors: market factors (demand, supply, competition and prices); infrastructural factors (road density, road quality and logistics facilities); territorial factors (population density, geographical location and economic specialization); and technological-institutional factors (digitalization, regulation, information systems and management quality).[16]

SCIENTIFIC AND PRACTICAL RECOMMENDATIONS

1. Regional road transport development programs should use differentiated investment criteria based on infrastructure provision, population density, freight and passenger intensity and economic specialization.

2. Infrastructure investment should prioritize territories where transport-demand growth exceeds the capacity of the existing road network.

3. A unified digital information environment should be further developed to connect carriers, freight owners, passengers, logistics operators and relevant public institutions.

4. The competitiveness of transport enterprises should be assessed using service quality, price, delivery time, safety, reliability, technological readiness and customer accessibility indicators.

5. Multimodal logistics and integration of road transport with railway, air and logistics-terminal infrastructure should be expanded.

6. Regional monitoring should combine road density, population accessibility, infrastructure capacity, transport-service volumes and market-growth indicators

5. Conclusion

The study confirms that the road transport services market is one of the most dynamically developing segments of Uzbekistan's service economy. During 2016-2025, the sector demonstrated an overall positive trajectory despite the significant disruption in 2020. In 2025, total transport services reached approximately UZS 188.3 trillion and road transport services approximately UZS 95.9 trillion, representing 50.9% of the market. The road transport services growth rate reached 114.2%, compared with 110.8% for transport services overall. At the same time, regional analysis reveals significant territorial disparities. Therefore, further market development requires a transition from predominantly quantitative expansion toward a comprehensive model integrating infrastructure modernization, territorial accessibility, service quality, digitalization, multimodal connectivity and competitive market mechanisms. The principal scientific implication is that the development of the road transport services market should be assessed simultaneously through dynamic, structural and territorial dimensions. This approach provides a more comprehensive understanding of market transformation and supports targeted regional transport policy.

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