

INNOVATION SCIENCE AND TECHNOLOGY



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ISSUE 1



Acceptance of papers **January, 2026**



Acceptance of papers

Published monthly



Topics

economics, technology, social sciences

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THE SCIENTIFIC-POPULAR ELECTRONIC
JOURNAL **"INNOVATION SCIENCE AND
TECHNOLOGY"** HAS BEEN REGISTERED
UNDER THE NUMBER **C-5669633** BY THE
AGENCY FOR INFORMATION AND MASS
COMMUNICATIONS (AOKA) OF THE
REPUBLIC OF UZBEKISTAN, EFFECTIVE
FROM OCTOBER 9, 2024.

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The scientific electronic journal "Innovation Science and Technology" has been included in the list of scientific publications recommended for the publication of main scientific results of dissertations for the award of PhD and DSc degrees in economics and technical sciences, in accordance with the Resolution No. 370 of the Presidium of the Higher Attestation Commission of the Republic of Uzbekistan, dated May 8, 2025.

Electronic publication, Issue 1. 88 pages.
Approved for publication on January, 2026.

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DEVELOPMENT TRENDS OF THE AUTOMOTIVE BUSINESS IN UZBEKISTAN

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Abstract: This article provides a comprehensive analysis of the development trends of the automotive business in Uzbekistan, its role and significance in the national economy, as well as the current state of the industry. The study identifies the key factors influencing the development of automotive production, sales, and service systems, and assesses domestic market opportunities and existing challenges based on SWOT analysis. In addition, the impact of increasing environmental requirements, the formation of the electric vehicle market, and changes in the service sector environment on the automotive business is examined. The findings serve as a scientific basis for developing practical recommendations aimed at ensuring sustainable development of the automotive business, improving service quality, and strengthening industry competitiveness.

Key words: automotive business, automotive industry, service services, dealership networks, localization, competitiveness, electric vehicles, environmental requirements, investment climate.

Annotatsiya: Mazkur maqolada O'zbekistonda avtomobil biznesining rivojlanish tendensiyalari, uning milliy iqtisodiyotdagi o'рни va ahamiyati hamda sohaning hozirgi holati kompleks tarzda tahlil qilingan. Tadqiqot jarayonida avtomobil ishlab chiqarish, sotish va servis xizmatlari tizimining rivojlanishiga ta'sir etuvchi asosiy omillar aniqlangan, ichki bozor imkoniyatlari va mavjud muammolar SWOT-tahlil asosida baholangan. Shuningdek, ekologik talablarning kuchayishi, elektromobillar bozorining shakllanishi hamda servis xizmatlari kon'yunkturasidagi o'zgarishlarning avtomobil biznesiga ta'siri atroflicha yoritilgan. Olingan natijalar avtomobil biznesini barqaror rivojlantirish, servis xizmatlari sifatini oshirish va sohaning raqobatbardoshligini kuchaytirishga qaratilgan amaliy tavsiyalar ishlab chiqish uchun ilmiy asos bo'lib xizmat qiladi.

Kalit so'zlar: avtomobil biznesi, avtomobilsozlik sanoati, servis xizmatlari, dilerlik tarmoqlari, mahalliyashtirish, raqobatbardoshlik, elektromobillar, ekologik talablar, investitsiya muhiti.

Аннотация: В статье представлен комплексный анализ тенденций развития автомобильного бизнеса в Узбекистане, его роли и значения в национальной экономике, а также современного состояния отрасли. В ходе исследования выявлены ключевые факторы, влияющие на развитие системы производства, реализации и сервисного обслуживания автомобилей, а также на основе SWOT-анализа оценены возможности внутреннего рынка и существующие проблемы. Особое внимание уделено влиянию усиления экологических требований, формированию рынка электромобилей и изменениям конъюнктуры сервисных услуг на развитие автомобильного бизнеса. Полученные результаты служат научной основой для разработки практических рекомендаций, направленных на устойчивое развитие автомобильного бизнеса, повышение качества сервисных услуг и укрепление конкурентоспособности отрасли.

Ключевые слова: автомобильный бизнес, автомобильная промышленность, сервисные услуги, дилерские сети, локализация, конкурентоспособность, электромобили, экологические требования, инвестиционный климат.

INTRODUCTION

In today's conditions of globalization and a market economy, the automotive industry and automotive business play a crucial role as one of the strategic sectors of the national economy. The automotive business represents a complex system that includes not only the production and sale of vehicles, but also service and maintenance, the spare parts market, logistics, financing, and insurance services. The sustainable development of this sector serves as an important factor in increasing public welfare, creating new jobs, and ensuring the competitiveness of the national economy.

In recent years, the deepening of economic reforms, improvement of the investment climate, and the implementation of state programs aimed at industrial modernization in the Republic of Uzbekistan have created broad opportunities for the rapid development of the automotive business. In particular, the growth in domestic vehicle production, the expansion of joint ventures with foreign investment, and the strengthening of competition in the automotive sales and service markets indicate that the sector is entering a new stage of development.

At the same time, the introduction of digital technologies, the growing demand for environmentally friendly vehicles, and the development of customer-oriented service models are emerging as key trends in the development of the automotive business in Uzbekistan. A comprehensive analysis of these processes and an assessment of their economic efficiency are among the most pressing issues today.

In recent years, population growth and rising income levels have led to significant changes in demand for automobiles. This situation compels each country to develop the automotive business in accordance with its own economic potential and conditions. Moreover, the development of the automotive market requires the parallel advancement of related sectors, including the quality and scale of automotive service and maintenance activities.

Research conducted in this area indicates that, at the current stage of modern development, it is impossible to imagine national economic progress without the automotive industry. In recent years, the global share of the automotive industry in gross domestic product has been increasing, and this growth dynamic contributes to the creation of new jobs and the rise in average wages. Furthermore, the automotive industry expands the taxable base and state budget revenues, stimulates the development of related industries, positively influences scientific and technological progress, and reflects the effective consumer demand and living standards of the population. Based on the above, it can be emphasized that the establishment and development of the automotive business has not only economic but also significant social importance. In Uzbekistan, various socio-economic mechanisms are being applied to promote the development of the automotive industry.

LITERATURE REVIEW

In a study conducted by Saberi (2018), the role and significance of the automotive industry in the economies of developed countries are analyzed in depth. The author evaluates the automotive industry as one of the key sectors that has a substantial impact on gross domestic product formation, industrial employment, and innovative development. The study scientifically substantiates the contribution of the automotive industry to the development of related sectors, the expansion of export potential, and the acceleration of technological progress. This work serves as an important theoretical source for substantiating the economic significance of developing the automotive business in Uzbekistan.

The monograph by V. A. Sheynin (2000) is devoted to contemporary challenges in the management of automobile transport, organizational and economic mechanisms, and effective managerial solutions. The author pays particular attention to issues of planning, rational use of resources, and the implementation of management models adapted to market relations within the automobile transport system. The scientific conclusions presented in the monograph are of considerable importance for making strategic decisions in automotive business management, particularly in improving the operation of dealership networks and service activities.

The work by K. Haksever, B. Render, R. Russell, and R. Merdick (2002) comprehensively addresses the theoretical and practical aspects of managing and organizing service operations. The authors emphasize service quality, customer satisfaction, operations management, and the achievement of competitive advantage. This source provides an essential theoretical foundation for the effective organization of automotive service processes, improving service quality, and establishing a customer-oriented management system.

The scientific work prepared by J. A. Romanovich and S. J. Kalachev (2009) is devoted to the economic essence of service activities, their organizational forms, and patterns of development. The study presents a comprehensive analysis of planning, monitoring, and improving service operations, highlighting the importance of introducing innovative approaches in the service sector. This source is particularly valuable for deriving scientific conclusions on the development of pre-sale and after-sales services in the automotive business and for improving their quality indicators.

RESEARCH METHODOLOGY

The study widely employed general and specific methods of scientific inquiry. In particular, methods such as analysis and synthesis, induction and deduction, comparison, and a systems approach were used to identify trends in the development of the automotive business. Dynamic and structural analysis methods were applied in the examination of statistical data. In addition, the SWOT analysis method was used to identify opportunities

and constraints in the development of the automotive business in the country, providing a comprehensive assessment of the sector's strengths and weaknesses, available opportunities, and potential threats. The research is based on the analysis of scientific works by domestic and foreign scholars, official statistical data, and open information sources.

ANALYSIS AND RESULTS

In order to identify the opportunities and constraints for the development of the automotive business in the country, the results of a SWOT analysis are presented (Table 1).

Table 1. SWOT Analysis of the Development of the Automotive Business in the Republic of Uzbekistan¹

Strengths	Weaknesses
<ul style="list-style-type: none"> - Vehicle production has been established under globally recognized brands (ISUZU, MAN, Chevrolet); - Government-provided incentives and a protectionist policy aimed at developing the automotive market; - A growing level of localization of related components and parts used in vehicle production; - Increased attention to improving the quality of pre-sale and after-sales services; - Expanded use of information technologies in organizing the activities of dealers and distributors; - Establishment of service centers specialized in the repair and maintenance of vehicles under national and foreign brands. 	<ul style="list-style-type: none"> - Slow pace of new product development at local manufacturing and assembly enterprises; - Frequent technical defects associated with manufactured vehicles; - Despite quantitative growth, automotive service provision remains insufficiently developed in terms of quality; - Underdeveloped roadside infrastructure and auxiliary service facilities specialized in vehicle maintenance.
Opportunities	Threats
<ul style="list-style-type: none"> - Excessively high domestic demand and the availability of opportunities to significantly increase sales volumes; - Import duties that provide competitive advantages to domestic manufacturers; - Opportunities to establish new automotive service types and expand service coverage; - Training personnel in sector-specific ICT to improve service quality; - Achieving competitive advantage and accessing external markets through product-related service offerings; - Development of sales and post-sale warranty services in the secondary vehicle market; - Availability of opportunities for training and upgrading the skills of employees engaged in the automotive business. 	<ul style="list-style-type: none"> - Risk of increased dependence on external markets if localization processes are not accelerated; - Rising vehicle costs and limitations in production capacity utilization due to imported components; - Declining business activity and loss of competitive advantage resulting from deficiencies in service quality and scope; - Risk of closure of dealership networks due to non-compliance with global management and marketing standards; - Adverse fluctuations in fuel markets and the global automotive market; - Changes in service market conditions due to stricter environmental requirements and the widespread adoption of electric vehicles.

Based on the presented SWOT analysis, it can be concluded that sufficient opportunities have been created in Uzbekistan for the development of the automotive business. The production of vehicles under well-known brands and the establishment of service systems constitute the key strengths of the sector.

Moreover, the increasing global emphasis on environmental requirements and the widespread introduction of electric and hybrid vehicles are leading to fundamental changes in the automotive service market. These processes impose new requirements and adaptation challenges for enterprises specialized in servicing conventional internal combustion engine vehicles. At the same time, the need to develop specialized maintenance services for electric vehicles, charging infrastructure, and environmentally compliant service systems presents not only certain threats but also new opportunities for the development of the national automotive market.

Overall, the automotive industry is regarded as one of the strategically important and promising priority sectors for the stable and long-term development of the national economy. The consistent development of the automotive business primarily serves to meet the steadily growing domestic demand through local production. This, in turn, contributes to reducing import volumes, limiting foreign currency outflows, and increasing export potential, thereby enhancing state foreign exchange revenues. As a result, a positive contribution is made to maintaining a favorable balance of payments.

¹ Author's compilation

In addition, the socio-economic significance of the development of the automotive industry and automotive business is considerable, as the sector facilitates the creation of new jobs, increases employment, enhances workforce skills, and raises real household incomes, thereby addressing important social issues.

From this perspective, it is appropriate at the next stage to conduct a comprehensive analysis of recent performance indicators of the automotive business, particularly the automotive manufacturing industry. The dynamics of the share of motor vehicle production within total industrial output in Uzbekistan during 2010–2020 indicate that this sector accounted for approximately 10–14 percent of overall industrial production over a ten-year period, demonstrating a relatively stable growth trend.

The share of motor vehicle production in industrial output reached its lowest level in 2016 at 4.6 percent; however, as a result of measures implemented to develop the sector in 2017–2018, it increased to 14.0 percent. The subsequent decline over the next two years led to a reduction to 11.1 percent. One of the main reasons for this decline can be attributed to the underutilization of existing capacity and continued dependence on external markets for the supply of components (Figure 1).

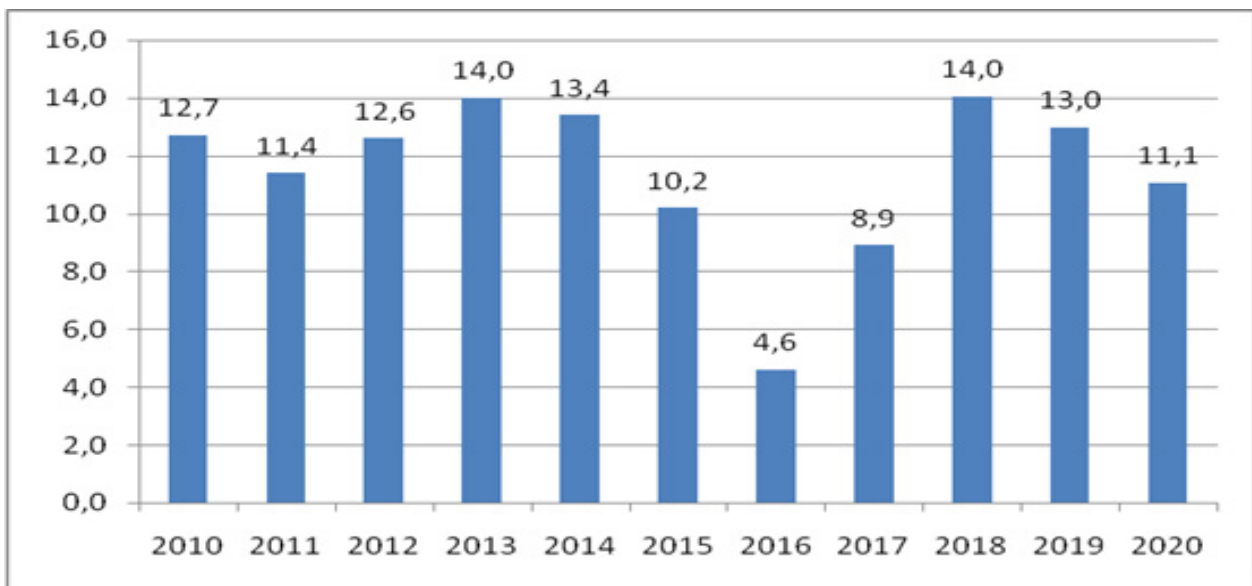


Figure 1. Dynamics of the share of motor vehicle production in industrial output in the Republic of Uzbekistan, 2010–2020 (percent)²

In recent years, the development of the automotive business in Uzbekistan has been closely linked to economic reforms, industrial diversification, and state policies aimed at improving the investment climate. The systems of vehicle production, sales, and service provision have been gradually modernized to meet domestic market needs while simultaneously enhancing export potential.

Within the discussion, particular attention should be paid to the growth of production volumes and the expansion of product ranges. The introduction of new models of passenger and commercial vehicles by domestic manufacturers, along with continuous improvements in their technical and design characteristics, has intensified competition in the domestic market. At the same time, the increasing level of localization has had a positive impact on reducing import dependence and lowering production costs.

Furthermore, the tightening of environmental requirements in the global automotive market and the widespread adoption of the “green economy” concept are creating new challenges for the national automotive business. The gradual introduction of electric and hybrid vehicles is altering service market conditions and may reduce demand for traditional maintenance services. Consequently, service enterprises are required to adopt new technologies, acquire specialized equipment, and train highly qualified personnel.

Financing mechanisms in the automotive business also represent an important issue for discussion. While the development of leasing, auto loans, and insurance services expands consumers’ ability to purchase vehicles, high interest rates and stringent financial requirements in some cases constrain market activity. Therefore, the development of effective cooperation mechanisms between financial institutions and automotive companies is of particular importance.

Overall, the analysis indicates that the key trends in the development of the automotive business in Uzbekistan include increasing production volumes, market diversification, improvement of service quality, and

² Author’s compilation

adaptation to environmental requirements. To ensure sustainable and long-term development of the sector, it is necessary to implement comprehensive measures aimed at adopting international best practices, expanding the use of digital technologies, and enhancing human capital potential.

CONCLUSIONS AND RECOMMENDATIONS

It has been determined that the automotive business in Uzbekistan is one of the strategic and promising sectors of the national economy. The steady growth in vehicle production volumes, the expansion of joint ventures involving well-known international brands, and the high level of domestic demand represent the key strengths of the sector.

At the same time, the tightening of environmental requirements and the widespread adoption of electric vehicles pose certain challenges for the automotive business; however, they also create additional opportunities for the development of new service offerings, the introduction of innovative technologies, and market diversification.

To ensure the sustainable and long-term development of the automotive business in Uzbekistan, it is advisable to implement comprehensive measures aimed at improving the quality of service provision, increasing investment in human capital, expanding the use of digital technologies, and effectively applying international best practices.

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Proofreader: Zokir ALIBEKOV

Layout and Designer: Oloviddin Sobir ugli

2026. № 1

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