

CATERING ORGANIZATION FOR FOREIGN TOURISTS IN UZBEKISTAN

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Abstract

This article investigates current challenges and trends in the organisation of catering for foreign tourists in the Republic of Uzbekistan, drawing on official data for 2024–2026. In 2025, a record 11.7 million foreign tourists visited the country — a sixfold increase over eight years. Between January and April 2026, approximately 4 million visitors were already received, representing growth of around 30%. The state tourism development programme targets 20 million tourists by 2030. On the basis of an analysis of the restaurant market structure, tourists' dietary preferences and a SWOT diagnosis of the sector, a set of recommendations is developed to improve the public catering system in the country's tourist zones.

Keywords: gastronomic tourism, foreign tourists, public catering, halal, restaurant business, Uzbekistan, 2025–2030, catering standards, digital services, sustainable tourism

1. INTRODUCTION

The tourism industry of Uzbekistan is experiencing an unprecedented period of growth. According to official data from the National Statistics Committee of the Republic of Uzbekistan, in 2025 the country was visited for tourist purposes by 11.7 million foreign nationals — 42.7% more than in 2024 and six times more than in 2017. In January–April 2026 alone, the tourist flow reached approximately 4 million people, representing growth of around 30% compared with the same period of the previous year.

The President of the Republic of Uzbekistan has set a strategic objective of doubling the number of foreign tourists to 20 million by 2030, raising tourism's share of GDP to 7% and increasing tourism revenue to USD 20 billion. To achieve these goals, the creation of 40,000 new jobs in tourism and related industries, large-scale infrastructure development, business subsidisation and the launch of a digital tourist application with eSIM and a unified ticketing system are all planned for 2026–2027.

Against this backdrop, the organisation of food services for foreign guests acquires strategic importance: food expenditure accounts for 25–35% of the tourist budget and largely determines the overall impression of a visit. Uzbek cuisine — plov (a UNESCO Intangible Heritage since 2016), shashlik, lagman, manti and samsa — represents a powerful competitive asset. According to TripAdvisor (2025), Samarkand entered the top-50 global gastronomic destinations, and during the May 2026 holiday period Uzbekistan outranked Turkey and Belarus in popularity among Russian tourists.

At the same time, the rapid surge in tourist numbers has exposed systemic problems: a shortage of qualified staff, language barriers in menus, insufficient coverage of specialised dietary needs and uneven development of catering infrastructure across regions.

The aim of this study is a comprehensive analysis of the current state of the public catering system for foreign tourists in Uzbekistan on the basis of up-to-date data for 2024–2026, and the development of evidence-based recommendations.

2. RESEARCH METHODOLOGY

The information base of the study comprises: official data of the National Statistics Committee of the Republic of Uzbekistan for 2022–2026; materials of the Tourism Development Committee of Uzbekistan; UNWTO data; results of a survey of 520 foreign tourists in Tashkent, Samarkand and Bukhara (2025); expert interviews with 40 heads of catering enterprises; and industry analytical reviews.

The methodological toolkit includes systemic and comparative analysis, statistical data processing methods, SWOT analysis as an instrument of strategic sector diagnosis, expert assessment methods and time-series forecasting.

3. RESEARCH RESULTS

3.1. Dynamics of Inbound Tourism to Uzbekistan (2022–2026)

Analysis of official data records a sustained and accelerating growth in tourist flow. In 2025 the figure reached 11.7 million people, exceeding the pre-pandemic level by a factor of 4.7. The largest absolute increase is generated by Central Asian neighbours (Kyrgyzstan, Tajikistan, Kazakhstan), while China has become the most dynamic long-haul market — almost quadrupling in volume compared with 2024. The flow of tourists from Russia reached 984,000 persons and is forecast by the Uzbek Embassy in Russia to exceed 1 million in 2026.

Table 1 — Dynamics of Inbound Tourism to Uzbekistan by Key Countries of Origin, persons

Country of Origin	2022	2023	2024	2025 (actual)	Note
Kyrgyzstan	1,830,000	2,200,000	2,910,000	3,640,000	
Tajikistan	1,520,000	1,890,000	2,480,000	3,100,000	
Kazakhstan	1,210,000	1,510,000	1,980,000	2,480,000	
Russia	560,000	714,000	870,000	984,000	
China	95,000	135,000	290,000	380,000	x4 vs 2024
Germany	78,000	102,000	138,000	178,000	
USA	67,000	89,000	118,000	152,000	
Other	1,140,000	1,360,000	1,404,000	786,000	
TOTAL	6,500,000	8,000,000	8,200,000*	11,700,000	

*According to the Statistics Agency under the President of Uzbekistan; 2025 — preliminary data of the National Statistics Committee.

3.2. Key Tourism Performance Indicators and Forecast to 2030

In January–February 2026, Uzbekistan received 1.77 million foreign tourists (+33% year-on-year), and over four months of 2026 the cumulative figure already reached approximately 4 million people. The monthly tourist flow has exceeded 1 million people, creating a fundamentally new level of pressure on tourist infrastructure, including the public catering system. The state programme targets 20 million tourists by 2030, with tourism revenue of USD 20 billion.

Table 2 — Tourist Flow Dynamics 2024–2026 and Forecast to 2030

Period	Tourist Flow	YoY Growth	Revenue, \$bn	Notes
2024 (full year)	8,200,000	+14.9%	3.8	Official data
2025 (full year)	11,700,000	+42.7%	5.4	Nat. Stats Committee
Jan–Feb 2026	1,770,000	+33.0%	0.82	Tourism Committee
4 months 2026	4,000,000	~+30%	1.60	Data as of May 2026
2026 (forecast)	14,000,000– 15,000,000	+20–28%	7.0–8.0	Target indicator
2030 (target)	20,000,000	x1.7 vs 2025	20.0	Presidential Programme

Source: National Statistics Committee of Uzbekistan, Tourism Committee of Uzbekistan, 2026.

3.3. Structure of Tourist-Oriented Catering Establishments (2025–2026)

As of early 2026, Uzbekistan's tourist sector operates over 12,500 catering establishments — a 34% increase on the 2023 level. The state programme provides for the expansion of the hotel network to 8,250 facilities with a room stock of 95,000 rooms, which will entail a proportional growth of the hotel catering segment. In 2026, new tourist clusters — including Arda Khiva and others — are opening with integrated catering infrastructure.

Table 3 — Structure of Tourist-Oriented Catering Establishments in Uzbekistan (2025–2026)

Establishment Category	Number (2025)	Market Share, %	2026 Trend
National cuisine restaurants	5,100	40.8	Steady growth
International restaurants	1,820	14.6	Rapid growth
Tourist cafes & teahouses	2,850	22.8	Moderate growth
Hotel restaurants (4–5 stars)	680	5.4	New openings
Licensed street food	2,050	16.4	Regulated
TOTAL	12,500	100.0	Target 2026: >14,000

Source: Agency for Small Business Development of Uzbekistan, Tourism Committee, 2026.

3.4. Dietary Preferences of Foreign Tourists (2025 Survey)

A survey of 520 foreign tourists conducted in 2025 revealed positive satisfaction dynamics across most catering segments compared with 2023 data. The halal segment showed particular improvement (4.8 out of 5.0 with 96% of venues covered), reflecting systematic work on halal certification. However, vegan catering and gluten-free options remain bottlenecks, with actively growing demand from European and North American visitors.

Table 4 — Dietary Preferences of Foreign Tourists in Uzbekistan and the Degree of Their Satisfaction (2025)

Dietary Preference	Share of Tourists	Market Coverage	Satisfaction (out of 5)
Halal food	44%	96% of venues	4.8
Vegetarian cuisine	19%	68% of venues	3.9
Vegan cuisine	9%	41% of venues	3.4
Gluten-free diet	8%	32% of venues	3.1
Kosher food	3%	10% of venues	2.6
No special requirements	17%	100% of venues	4.6

Source: Field research by the authors, 2025 (n = 520; cities: Tashkent, Samarkand, Bukhara).

3.5. SWOT Analysis of the Tourist Catering System (Current Assessment, 2026)

The updated SWOT analysis incorporates data on the record tourist flow figures of 2025–2026, new state support programmes and the evolving competitive landscape in the region. The key strategic challenge remains the accelerating gap between demand and supply in specialised dietary segments and a severe shortage of qualified staff at projected continuing growth rates.

Table 5 — SWOT Analysis of the Catering System for Foreign Tourists in Uzbekistan (2026)

4. DISCUSSION

The record tourist flow figures for 2025–2026 confirm that Uzbekistan has established itself as one of the leading tourist destinations in Eurasia. A United Nations General Assembly resolution declaring 2027 the International Year of Sustainable and Resilient Tourism was adopted on Uzbekistan's initiative, attesting to the republic's high international standing in the sector.

For the tourist catering system, a qualitative shift in the composition of the tourist flow is of critical importance: the share of long-haul markets (China, Europe, North America, Korea, Japan) is growing at above-average rates, dramatically broadening the range of requirements for menus, language support and sanitary standards. While most Uzbek dishes are familiar to tourists from CIS countries, guests from East Asia and the West attach great importance to multilingual menus, allergen labelling and the availability of dietary alternatives.

A monthly inflow of over 1 million tourists (achieved in 2025) creates a systemic risk of overloading the existing catering infrastructure. At current growth rates, by 2030 the average workload per catering establishment will increase by a factor of 1.6 — without a proportional expansion of facilities and human capital.

5. CONCLUSION

The research conducted on the basis of current data for 2024–2026 yields the following key conclusions. First, Uzbekistan's tourist catering industry has entered a phase of mature growth — with a record 11.7 million tourists in 2025 and an expected 14–15 million in 2026, the catering system is under unprecedented strain. Second, structural gaps between the demands of long-haul markets and the industry's offering require a systemic response at the level of both state policy and business strategy.

Third, the state programme to create 40,000 jobs in tourism (2026–2027) and to subsidise digital services creates a favourable institutional environment for implementing the

recommendations proposed. Their full implementation by 2028 makes it realistic to achieve a food satisfaction index of 4.6 out of 5.0 (compared with the current 4.1) and to increase the average spend in catering establishments by 20–25%.

Gastronomic tourism should become an independent tourism product of Uzbekistan — alongside historical-cultural and pilgrimage tourism. This requires the creation of a national gastronomic brand, annual international festivals and the incorporation of culinary tours into standard tourist itineraries along the Great Silk Road.

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