

"REGIONAL INDUSTRIAL DEVELOPMENT (CASE STUDY OF NAVOI REGION)"

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Abstract:

Navoi Region, located in the central part of the Zarafshan area, is distinguished by its vast mineral resource potential and highly industrialized economy. Key minerals include gold, uranium, silver, rare metals, phosphorite, asbestos, feldspar, marble, and other precious stones, with the Muruntov gold mine ranking among the world's largest. Navoi city functions as a multifunctional regional center, while Zarafshan, Uchkuduk, and Gazgan are specialized industrial towns, and Kiziltepa and Yangirabot serve as agro-industrial district centers. In 2024, 26.0% of the employed population worked in the industrial sector, reflecting the region's strong industrial orientation. Industry and construction together account for 71.9% of the regional economy, making Navoi the most industrialized region in Uzbekistan. The region plays a leading role nationally in metallurgy (47.3%), electric power (16.3%), chemical and petrochemical industries (11.3%), construction materials (9.2%), and machine-building (5.6%). Between 2010 and 2024, metallurgical production nearly doubled, while other industrial sectors declined, indicating increasing specialization in metallurgy. The region's industrial output, major enterprises, and sectoral structure demonstrate its strategic economic importance and highlight trends in regional industrial development.

Keywords: Navoi Region, industrial development, mineral resources, metallurgy, economic specialization, sectoral structure, regional economy, mining industry, industrial output, economic growth.

Navoi Region, located in the central part of the Zarafshan area, possesses significant mineral resource potential. Its main minerals include gold, uranium, silver, rare metals, phosphorite, asbestos, feldspar, marble, and several precious stones. The Muruntov gold mine is considered one of the largest gold deposits in the world and, in certain years, ranks among the leading gold mines globally in terms of extraction volume and reserves.

Functionally, Navoi city serves as a multifunctional regional center and stands out among other regional centers due to its large, diversified industrial production. Navoi is one of the cities with the largest industrial output in the country. Zarafshan, Uchkuduk, and Gazgan are

narrowly specialized industrial towns (resource towns or mono-cities), while Kiziltepa and Yangirabot are classified as district centers with local agro-industrial and service functions. Among economic activities, the largest share of employed population works in the industrial sector, accounting for 26.0% (2024). The high proportion of industrial employment is a distinctive feature of the regional workforce distribution by sectors.

The sectoral structure of the region's gross regional product (GRP) differs sharply from most other areas, as the largest portion is occupied by industry and construction. Industry and construction account for 71.9% of the regional economy (31.1% of the national GDP), making Navoi Region the most industrialized economy among Uzbekistan's regions.

Currently, Navoi Region, distinguished by its diversified industry, contributes significantly at the national level: metallurgical industry – 47.3% (1st place among regions), electric power – 16.3% (3rd place), chemical and petrochemical industry – 11.3% (4th place), construction materials industry – 9.2% (4th place), and machine-building and metal-processing industry – 5.6% (6th place) as of 2022. The region's specialization coefficient in all these industrial sectors is very high.

From January to December 2024, the industrial output of Navoi Region amounted to 84.1 trillion soums, showing a growth rate of 104.5% compared to the previous year. The region's share in the national industry is 7.5%, ranking 3rd among the regions after Tashkent city and Tashkent Region. Major industrial enterprises of national importance operating in the region include the Navoi Mining and Metallurgical Combine, "Navoi Uranium", "Navoi Azot", Electrochemical Plant, Navoi Thermal Power Plant, and "Kyzylkum Cement".

The sectoral composition of the region's industrial production in 2024 is as follows: mining and open-pit operations – 12.2%, electricity, gas, steam, and air conditioning supply – 5.8%, water supply, sewage, waste collection, and disposal – 0.1%. Notably, the share of mining and open-pit operations is considerably higher compared to other regions. Metallurgy stands out in the industrial sector with a share of 64.5%. Other relatively significant sectors include chemical production (5.4%), food production (3.4%), and production of other non-metallic mineral products (2.2%).

Between 2010 and 2024, the share of metallurgy nearly doubled (from 32.1% to 64.5%), while the share of other sectors decreased significantly. Specifically, mining and open-pit operations decreased from 23.5% to 12.2%, food production from 7.2% to 3.4%, garment production from 3.1% to 1.4%, production of other non-metallic mineral products from 12.8% to 2.2%, and machinery installation and repair from 1.2% to 0.3% (Table 1).

This indicates a strong reduction in the diversity of industrial production, with the region becoming increasingly specialized in metallurgy in recent years.

In 2024, industrial enterprises in Navoi Region produced 61.9 thousand tons of caustic soda, 289.9 thousand tons of ammonium nitrate, 741.4 thousand tons of anhydrous ammonia, 228.9

thousand tons of urea, 3,015 thousand tons of Portland cement, 6,543 thousand tons of rigid plastic pipes, tubes, and hoses, and 54.7 thousand tons of soft wheat and spelt flour. During the same year, 11,572.3 million kWh of electricity were generated in the region, accounting for 16.3% of the country's total electricity production.

In terms of the regional structure of industry, Navoi city holds a dominant share of 84.7%. It should be noted, however, that the output of the Navoi Mining and Metallurgical Combine, operating in Navoi and Zarafshan cities as well as Uchkuduk and Konimekh districts, is officially recorded under Navoi city. Therefore, the official share of Zarafshan city and Uchkuduk district in the region's industrial structure does not even reach 1%. After Navoi city, the next largest share in industrial production belongs to Karmana district (9.7%), while the shares of other administrative-territorial units remain very low.

Table 1 Industrial Production in Navoi Region by Type of Economic Activity

(In percentage)

Industrial output volume, billion soums	2000	2005	2010	2015	2020	2023	2024
	100	100	100	100	100	100	100
Mining and open-pit operations	18,0	20,0	23,5	22,4	9,5	11,8	12,2
Food production	3,0	4,5	7,2	8,8	2,6	2,4	3,4
Textile production	0,8	1,2	2,2	6,3	1,7	1,9	1,8
Clothing production	0,5	0,7	3,1	0,0	1,2	1,2	1,4
Chemical products manufacturing	6,0	7,0	8,0	6,9	3,3	6,0	5,4
Production of other non-metallic mineral products	10,0	11,0	12,8	9,4	3,9	2,4	2,2
Metallurgical industry	52,0	48,0	32,1	30,7	68,0	61,7	64,5
Electricity, gas, steam supply, and air conditioning	5,0	6,0	6,5	9,4	5,6	6,7	5,8
Other sectors	4,7	1,6	4,6	6,1	4,2	5,9	3,3

In the structure of industrial goods exports from the region, chemicals and similar products not classified under other categories account for 61.0%, and industrial goods make up 21.1%, representing the main export items. In imports, the largest shares are machinery and transport equipment (37.4%), industrial goods (30.8%), and chemicals and similar products not classified under other categories (15.1%).

Many economic indicators in Navoi Region, especially industrial production, reflect a high degree of centralization, with the regional center playing a dominant role. A significant portion of the population in surrounding districts (including Pakhtachi district of neighboring Samarkand Region) is employed in large industrial enterprises, trade, and social facilities in Navoi city, resulting in highly intensive daily commuting. This has led to the formation of the Navoi urban agglomeration.

Additionally, Karmana district, which hosts the Navoi Thermal Power Plant (TPS) and the Navoi Free Economic Zone, plays a significant role in the regional economy and its corresponding territorial economic relations.

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