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DEVELOPMENT TRENDS AND ECONOMIC CHARACTERISTICS OF THE MEDICAL SERVICES MARKET

Urokov Firdavs Ortikniyoz ugli

Senior Lecturer at the Department of Economic Analysis and Statistics,
Samarkand Institute of Economics and Service

E-mail: firdavs26031995@gmail.com

ORCID: 0009-0004-4461-0692

Abstract. The medical services market is an important component of the service economy, combining substantial social significance with growing economic potential. This study examines the main development trends and economic characteristics of the medical services market, with particular emphasis on the conditions of Uzbekistan. The research analyzes the dynamics of healthcare service volumes, structural changes, regional differentiation, the development of private medical services, digitalization processes, human resource potential, and the growing demand for high-quality and specialized medical services.

Keywords: medical services market, healthcare services, market development, economic characteristics, healthcare economics, medical service providers, digitalization, private healthcare, service quality, competition, human capital.

Аннотация. Рынок медицинских услуг является важной составляющей сферы услуг, сочетая высокую социальную значимость с растущим экономическим потенциалом. В данном исследовании рассматриваются основные тенденции развития и экономические особенности рынка медицинских услуг с особым акцентом на условия Узбекистана. В работе анализируются динамика объемов медицинских услуг, структурные изменения, региональная дифференциация, развитие частных медицинских услуг, процессы цифровизации, кадровый потенциал, а также растущий спрос на качественные и специализированные медицинские услуги.

Ключевые слова: рынок медицинских услуг, медицинские услуги, развитие рынка, экономические особенности, экономика здравоохранения, организации медицинских услуг, цифровизация, частное здравоохранение, качество услуг, конкуренция, человеческий капитал.

INTRODUCTION

The medical services market occupies a strategically important position in the modern service economy because it simultaneously performs economic, social, and human capital development functions. The development of this market directly influences population health, labor productivity, life expectancy, and the overall quality of human capital. At the same time, medical services constitute a significant area of economic activity involving financial resources, qualified labor, infrastructure, advanced technologies, and investment. Therefore, studying the development trends and economic characteristics of the medical services market is important for improving the efficiency, sustainability, and competitiveness of healthcare service providers.

In recent years, the global healthcare market has undergone substantial structural transformation. Population aging, the growing prevalence of chronic diseases, technological progress, increasing healthcare expenditure, the development of private medical organizations, and rising consumer expectations have contributed to greater demand for medical services. At the same time, digital technologies, telemedicine, electronic medical records, artificial intelligence, and data analytics are transforming traditional approaches to the organization and delivery of healthcare services. The World Health Organization emphasizes that digital transformation can contribute to the development of more accessible, integrated, efficient, and patient-centered healthcare systems.

Uzbekistan is also experiencing important changes in the medical services sector. Healthcare modernization, the expansion of private medical services, the introduction of digital technologies, the development of specialized

medical services, and improvements in healthcare infrastructure are creating favorable conditions for further market development. According to the National Statistics Committee, the volume of healthcare services in Uzbekistan reached 19.9 trillion soums in 2025, representing an increase of 14.2% compared with 2024. This reflects the growing economic scale of the medical services market and its increasing contribution to the country's service sector.

The economic characteristics of the medical services market distinguish it from many other service markets. Medical services are characterized by a relatively high level of information asymmetry between service providers and consumers, substantial dependence on qualified human resources, significant regulatory oversight, uncertainty regarding service outcomes, and considerable social importance. In this market, consumers may have limited opportunities to independently assess the necessity, quality, or effectiveness of a medical service before receiving it. Consequently, professional reputation, staff qualifications, accreditation, technological capabilities, and patient satisfaction become important factors influencing market competitiveness.

Another important characteristic is the growing role of digitalization as an economic factor. The introduction of electronic medical records, digital appointment systems, electronic payment mechanisms, telemedicine, and automated management systems can reduce transaction and administrative costs, improve resource utilization, and accelerate service delivery. Therefore, digital transformation should be considered not only as a technological process but also as an important mechanism for increasing the economic efficiency and management effectiveness of medical service providers.

The scientific significance of the study lies in the comprehensive examination of the medical services market as an integrated economic system in which demand, supply, human resources, infrastructure, technology, competition, financing, and service quality interact. The practical significance of the research lies in the possibility of applying the findings to improve the management and development strategies of medical service providers and to formulate scientifically grounded measures aimed at supporting the sustainable development of the healthcare services market in Uzbekistan.

LITERATURE REVIEW

The medical services market has been extensively examined within the fields of healthcare economics, resource efficiency, accessibility, service quality, digital transformation, and institutional development. The World Health Organization emphasizes that the sustainable development of healthcare systems requires an appropriate balance among accessibility, quality, efficiency, and financial sustainability [1].

The European Observatory on Health Systems and Policies notes that Uzbekistan's healthcare system has undergone substantial reforms aimed at strengthening primary healthcare, improving healthcare financing, enhancing institutional coordination, and advancing digital transformation. At the same time, the more balanced distribution of healthcare resources and medical personnel across regions remains an important area for further development [2].

The OECD identifies healthcare productivity and efficient resource utilization as key determinants of healthcare system performance. According to the OECD, higher healthcare expenditure alone does not necessarily ensure improved outcomes; therefore, healthcare organizations need to enhance productivity, optimize resource allocation, and strengthen management mechanisms [3].

Digitalization has become another important factor in the transformation of the medical services market. OECD research emphasizes that electronic health records, digital platforms, telemedicine, and data management systems can improve coordination, information exchange, and evidence-based decision-making within healthcare organizations [4].

The development of Uzbekistan's medical services market can also be assessed through official statistical indicators. Data from the National Statistics Committee indicate a substantial increase in the volume of healthcare services in recent years, reflecting the expanding economic scale and growing importance of the sector [5].

The National Statistics Committee also provides information on the number of enterprises operating in healthcare and social services. The increase in the number of economic entities in this sector indicates the expansion of the service-provider base, diversification of medical services, and the gradual development of competitive market relations [6].

Accordingly, this study examines the medical services market as an integrated economic system in which healthcare enterprises, consumers, financial resources, technologies, human capital, and institutional regulation interact. This approach provides a methodological basis for assessing market development trends and formulating scientifically grounded recommendations aimed at improving the economic efficiency, sustainability, and competitiveness of medical service providers.

RESEARCH METHODOLOGY

This study applies a combination of systematic, statistical, comparative, structural, and economic analysis methods to examine the development trends and economic characteristics of the medical services market. The methodological framework is based primarily on official statistical data from Uzbekistan, together with relevant international analytical approaches in the field of healthcare economics.

ANALYSIS AND RESULTS

The medical services market is characterized by continuous quantitative and qualitative transformation. Market expansion is influenced by population growth, increasing demand for healthcare services, the development of private healthcare, technological modernization, digitalization, and changing consumer preferences. In Uzbekistan, these factors have contributed to a substantial increase in the economic volume of healthcare services and to the growing importance of the sector within the national service economy.

According to official statistical data, the volume of healthcare services increased from 258.0 billion soums in 2010 to 19,890.6 billion soums in 2025. This substantial growth reflects the expansion of the medical services market, the broader availability of healthcare services, and the increasing economic significance of the sector. The observed dynamics also indicate the strengthening role of healthcare services in the structure of the national service economy and create favorable conditions for the further development of medical service providers (Table 1).

Table 1. Dynamics of healthcare services in Uzbekistan, 2020-2025¹

Year	Volume of healthcare services, bln soums	Growth rate, %
2020	5 257,0	94,4
2021	7 886,5	127,6
2022	10 193,0	112,9
2023	12 992,4	109,6
2024	15 961,8	109,6
2025	19 890,6	114,2

The data indicate that the market experienced a temporary decline in 2020, which can be associated with disruptions in healthcare service delivery during the COVID-19 pandemic. However, the market recovered rapidly in 2021, with the volume of healthcare services increasing by 27.6%. Subsequently, stable growth continued, and by 2025, the volume of healthcare services had reached approximately 19.9 trillion soums.

The increase in market volume should not be interpreted solely as an increase in the number of services provided. It also reflects changes in service prices, the expansion of healthcare providers, the introduction of new types of medical services, technological modernization, and increased expenditure on healthcare.

An important feature of the medical services market is its structural diversification. The market encompasses inpatient treatment, outpatient medical practice, dentistry, diagnostic services, rehabilitation, preventive services, and other healthcare-related activities.

According to official statistics, healthcare services in Uzbekistan are divided into three major groups: hospital services, medical practice and dentistry, and other healthcare services [5]. Such diversification indicates that the economic structure of the market is gradually expanding beyond the traditional hospital-based healthcare model.

The expansion of outpatient and specialized services has important economic implications. Outpatient treatment can reduce healthcare provision costs compared with prolonged inpatient treatment in cases where hospitalization is not medically necessary. At the same time, the development of diagnostic, rehabilitation, and preventive services creates new market segments and additional development opportunities for medical service providers.

Therefore, the diversification of the medical services market can contribute to both greater consumer choice and stronger competition among service providers.

The expansion of private medical organizations is another significant structural trend in Uzbekistan's healthcare market. According to the National Statistics Committee, the number of enterprises operating in

¹ Author's development

healthcare and social services has increased, indicating the expansion and diversification of the sector's economic base.

From an economic perspective, competition encourages healthcare providers to identify effective ways of optimizing service costs while maintaining or improving service quality. This creates incentives for medical enterprises to enhance labor productivity, optimize procurement processes, improve equipment utilization, and introduce digital management systems.

At the same time, effective competition in the medical services market requires appropriate quality standards and regulatory mechanisms, as patients may have limited opportunities to independently assess the professional and clinical quality of medical services before receiving them.

Digitalization is becoming one of the most important factors influencing the economic development of the medical services market. Electronic medical records, electronic prescriptions, online appointment systems, telemedicine, electronic payments, and integrated information systems are transforming both the organization of medical services and the interaction between healthcare providers and consumers.

In Uzbekistan, the development of the electronic healthcare system includes such components as "Electronic Polyclinic," "Electronic Hospital," "Electronic Medical Card," and "Electronic Prescription." Their implementation creates opportunities to reduce administrative costs, improve information exchange, optimize management processes, and accelerate service delivery.

The economic efficiency of medical enterprises depends not only on the number of employees but also on the efficiency and productivity of their work. Accordingly, labor productivity can be calculated as follows:

$$LP = \frac{R}{L} \quad (1)$$

where:

LP – labor productivity;

R – revenue from medical services;

L – number of employees.

The World Health Organization's analysis of Uzbekistan identifies the distribution and availability of healthcare personnel as important factors in the further development of the healthcare system. Consequently, human resource policy should be regarded as an important component of the economic development strategy of the medical services market.

The medical services market differs from conventional consumer service markets because of several specific economic characteristics.

First, there is a relatively high degree of information asymmetry between healthcare providers and patients. Physicians generally possess more specialized information about diagnosis, treatment options, and expected outcomes than consumers.

Second, medical services are characterized by high labor intensity. Qualified physicians, nurses, laboratory specialists, and technical personnel constitute a substantial component of service delivery costs and overall organizational capacity.

Third, the market is subject to significant regulatory oversight. Licensing requirements, professional standards, quality regulations, financing mechanisms, and pricing conditions influence the activities and development strategies of medical service providers.

Fourth, demand for essential medical services is relatively stable because healthcare needs cannot always be postponed and often require timely intervention.

Fifth, the market is becoming increasingly technology-intensive. Modern diagnostic equipment, digital platforms, laboratory technologies, and artificial intelligence require substantial investment but can contribute to higher productivity, improved service quality, and more efficient resource utilization.

Sixth, the quality of medical services has both social and economic dimensions. Higher service quality can strengthen patient trust, encourage repeat demand, enhance organizational reputation, and improve market competitiveness.

Service quality is increasingly becoming an important competitive factor in the medical services market. Patients assess not only treatment outcomes but also accessibility, waiting time, communication quality, convenience, transparency, and the technological capabilities of healthcare providers.

The relationship between these factors can be presented as follows (Figure 1):



Figure 1. Relationship between medical service quality and the economic efficiency of medical service enterprises²

Therefore, investments in service quality should not be regarded solely as additional costs. In the long term, such investments can generate additional demand, strengthen patient trust, enhance organizational reputation, and improve the competitive position of medical service providers.

Based on the analysis, the main factors determining the development of the medical services market can be grouped as follows (Table 2).

Table 2. Key factors influencing the development of the medical services market and their expected economic effects³

Factor	Mechanism of influence	Expected economic result
Population and demographic changes	Increasing demand for medical services	Market expansion
Private-sector development	Increasing competition and investment	Service diversification
Digitalization	Reduction of transaction costs	Higher productivity
Human capital	Improvement of labor productivity	Higher service capacity
Infrastructure	Expansion of service availability	Increased market coverage
Medical technologies	Improvement of diagnostics and treatment	Higher service quality
Competition	Pressure to improve price and quality	Greater efficiency
Preventive medicine	Reduction of costly complications	Lower long-term costs
Patient orientation	Growth of satisfaction and loyalty	Increased demand
Government regulation	Establishment of quality and safety standards	Market stability

The table demonstrates that the development of the medical services market is determined by the interaction of multiple economic, technological, institutional, and human resource factors rather than by a single economic variable. In particular, digitalization and human capital simultaneously contribute to improving both service quality and the economic efficiency of medical service providers.

Overall, the medical services market should develop in accordance with the principle of “higher quality through more efficient resource utilization.” This approach is essential for strengthening the long-term competitiveness, operational efficiency, and financial sustainability of medical service enterprises.

CONCLUSION AND RECOMMENDATIONS

The analysis demonstrates that the medical services market is becoming an increasingly important component of the service economy and human capital development. In Uzbekistan, the market has experienced substantial quantitative expansion, accompanied by structural diversification, the development of private medical organizations, digital transformation, and growing demand for high-quality and specialized medical services. Official statistical data also confirm the significant increase in the volume of healthcare services in recent years.

Based on the findings, the following priorities are proposed for the sustainable development of the medical services market:

- accelerate digital transformation and ensure the effective integration of electronic healthcare systems;
- increase labor productivity through more efficient workforce allocation and continuous professional development;

² Author's development

³ Author's development

- improve the utilization efficiency of medical infrastructure and equipment;
- expand private-sector participation while further strengthening quality assurance and monitoring mechanisms;
- introduce economic efficiency indicators for the systematic assessment of medical service enterprises.

Thus, the future development of the medical services market should be based not only on increasing the volume of services, but also on achieving a sustainable balance among economic efficiency, service quality, accessibility, innovation, and social effectiveness. The implementation of these priorities can strengthen the competitiveness of medical service enterprises, improve resource utilization, and contribute to the sustainable development of Uzbekistan's healthcare sector.

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