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Analysis of Export Indicators and Development Trends of Textile Industry Enterprises of the Republic of Uzbekistan

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Abstract: This article provides an in-depth analysis of the export activities of textile industry enterprises of the Republic of Uzbekistan, highlighting the current state and development trends of the industry. During the study, the main directions of the country's textile exports, the geography of foreign markets, the annual dynamics of export volumes and its shaping factors were studied. Also, special attention is paid to the mechanisms for supporting the sector, stimulating the activities of exporting enterprises and increasing their competitiveness in international markets based on the resolutions and decrees of the President of Uzbekistan. Based on the analysis, scientific and practical recommendations have been developed to expand the export potential of the textile industry, increase the production of finished products with high added value, and improve the logistics system. The results of the article are of practical importance for textile industry enterprises, entities engaged in export activities, and organizations developing economic policy.

Keywords: Textile Industry, Export, Sewing and Knitting Products, Diversification, Modernization, Export Geography, International Market, Certification, International Standards

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1. Introduction

The Republic of Uzbekistan is implementing comprehensive reforms to modernize the industrial sectors of the national economy, improve the quality of products, and accelerate the country's integration into the world economic system. At the heart of these reforms is a strategic approach aimed at ensuring sustainable growth of the national economy through the development of the export potential of industrial sectors, the introduction of international standards, and the expansion of the production of high-value-added products. In particular, the strategic development program "Uzbekistan - 2030" identifies increasing the foreign trade potential of the national economy and diversifying the export structure as one of the priority areas. The main goals set out in the program are as follows[1]:

Firstly, it is planned to double the country's total export volume to 45 billion US dollars. This figure represents a significant expansion of the national export potential.

Secondly, by increasing the number of business entities engaged in export from the current 6.5 thousand to 15 thousand, the number and quality of exporters will increase.

Thirdly, it is planned to increase the share of finished and semi-finished products in the export structure by 3.3 times, which, in turn, will ensure a transition from raw material exports to processed, high-value products.

Fourth, one of the strategic tasks is to capture new export markets by expanding exports of finished and technological products to the European Union countries within the framework of the GSP+ system and other preferential trade regimes.

Fifth, it is planned to increase the number of enterprises that have introduced international quality standards by 10 times, bringing their total number to 5 thousand. This will contribute to a sharp increase in the volume of production of products that meet international requirements and standards.

Sixth, it is planned to establish special economic zones with the participation of 50 leading world brands, which will allow the formation of production systems based on advanced technologies in these regions.

Seventh, within the framework of the concept of "New Uzbekistan - a country of competitive products", comprehensive - institutional, organizational and financial - support for exporters with the potential to bring national brands to foreign markets is noted as a strategic goal[2].

2. Materials and Methods

In this study, the following scientific and methodological approaches were used to analyze the dynamics of textile and garment exports in Uzbekistan and study the indicators of its development:

1. Statistical analysis method - based on data from the State Statistics Committee, the Ministry of Investments, Industry and Trade, and international organizations (UNCTAD, WTO, ITC), trends in export volume, geography, and product composition were studied.
2. Dynamic series analysis - annual changes in export indicators, growth rates, and stability were assessed using dynamic series.
3. SWOT analysis - strengths and weaknesses, opportunities, and threats of textile exports were identified, and development prospects were determined.
4. Scientific generalization and inductive approach - existing theoretical views, regulatory legal acts, and practical results were summarized, conclusions and recommendations for the sector were developed.

Main Part

In general, the above-mentioned target areas serve as an important stage in the integration of the Republic of Uzbekistan into the global economy, diversification of the export structure, increasing the competitiveness of national products and ensuring compliance with international standards.

The role of the textile industry, one of the strategic sectors in increasing the export potential of the national economy, is of particular importance. The textile industry is one of the priority sectors of the economy of Uzbekistan, which plays an important role not only in ensuring economic growth, but also in increasing employment and expanding foreign trade. This sector is inextricably linked with agriculture, in particular cotton growing, and creates the opportunity for the effective use of domestic resources and the production of high value-added products.

Scientific sources emphasize that the textile industry forms a complete production chain based on the processing of cotton raw materials. This makes it a complex sector with high economic efficiency[3]. In particular, the sector has formed a value-added chain based on deep processing of raw materials - cotton fiber, yarn, fabric, ready-made clothing, hygienic products and technical textiles. In addition, the textile sector is labor-intensive and plays a significant role in creating sustainable jobs, especially for women and young people. The introduction of high technologies in this sector, ensuring compliance with international standards and the establishment of production clusters in cooperation with

foreign brands will significantly increase the competitiveness of Uzbek textile products in global markets.

In general, the above-mentioned strategic directions serve as an important stage in the integration of the Republic of Uzbekistan into the global economy, diversification of the export structure, increasing the competitiveness of national products and ensuring their compliance with international standards. In this regard, comprehensive support for the textile industry as a strategic sector serves to form a stable foundation for national economic development.

3. Results and Discussion

The cluster policy implemented in the textile industry has also further strengthened the sector's position in the economy. Cotton-textile clusters combine the process from raw material production to finished product export, allowing for rational use of resources, improving product quality, and organizing production that is flexible to market demand. In addition, the textile industry is one of the leading sectors in Uzbekistan in introducing international standards and innovative technologies. In particular, the number of enterprises that have implemented standards such as ISO 9001, OEKO-TEX, GOTS, BSCI is increasing every year. This is of great importance in increasing the competitiveness of products and expanding their opportunities for entering foreign markets[4].

Also, in practice, localization processes are actively being implemented through the textile industry. That is, the potential available in the domestic market is being fully utilized in the production of finished products. The production of buttons, fittings, fasteners, labels and other auxiliary products by local entrepreneurs is expanding, which serves to reduce external dependence. According to official data, the workforce employed in the textile industry accounts for more than 20 percent of the total workforce, which makes it an important factor in ensuring social stability[5].

According to the National Statistics Committee of the Republic of Uzbekistan, in 2024, the country produced industrial products worth a total of 885.8 trillion soums, which is an increase of 6.8% compared to 2023. As of January 1, 2025, the number of business entities and organizations operating in the industrial sector reached 55.6 thousand. In recent years, positive changes have also been observed in the textile industry in the industrial structure. Today, more than 6 thousand business entities in the textile sector provide permanent employment to 570 thousand people. It should also be noted that among industrial sectors, the textile industry is the one that creates the largest number of jobs and employs the largest number of people[6]. This creates the basis for recognizing this sector as an important sector that ensures not only economic but also social stability.

Over the past five years, the volume of textile production in Uzbekistan has been steadily increasing. In particular, in 2024, the textile industry accounted for 11.9 percent of the total industrial structure, maintaining a growth trend compared to 2023. According to the results of the analysis for 2020-2024, the physical volume index of textile production in 2024 increased by 11.1 percent compared to 2023, and the total production volume amounted to 89.5 trillion soums[7].

This growth rate is directly related, first of all, to the modernization processes being carried out in the industry, the introduction of new innovative technologies, the expansion of export destinations, and the institutional support mechanisms provided by the state[8].

In 2020-2024, the volume of clothing production in the Republic of Uzbekistan demonstrated stable growth dynamics. In particular, in 2024, the share of this industry in total industrial production amounted to 4.5 percent, which indicates that the role of the clothing industry in the national economy is increasingly strengthening. Over the past five years, the physical volume index of production in this sector has increased by 9.4 percent compared to 2023. This indicates that a sustainable development trend is observed as a result of investment activity in the industry, the introduction of modern technologies, and

increased demand in the domestic and foreign markets. The total volume of clothing production in 2024 amounted to 33.76 trillion soums, see figure 1.

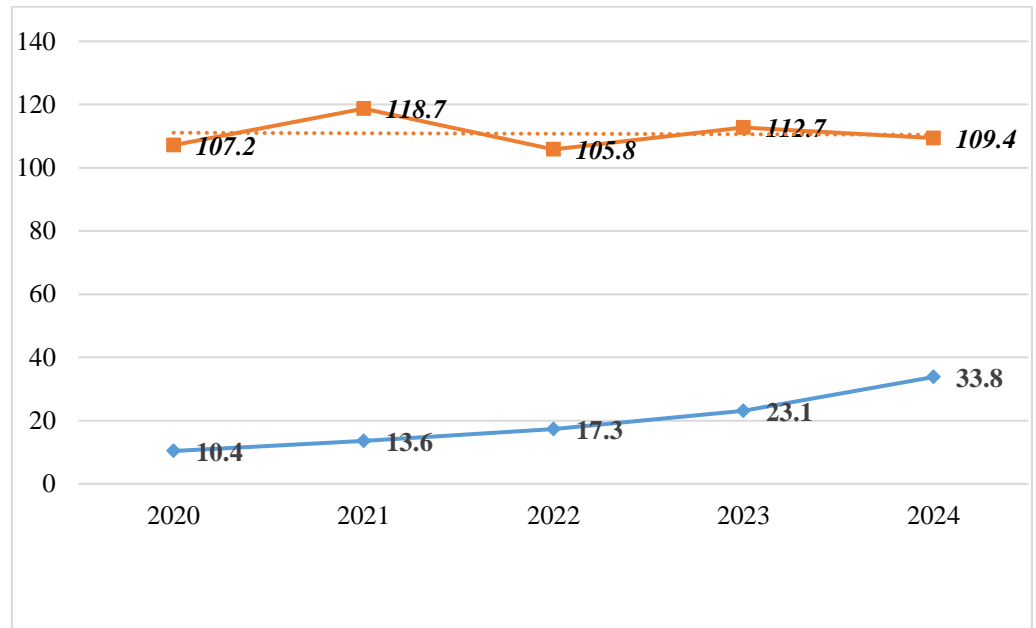


Figure 1. Clothing production indicators in Uzbekistan.

There was a significant difference between regions in the volume of textile production in 2024. In particular, Andijan region recorded the highest production volume in the country, amounting to 20.4 trillion soums, see figure 2.

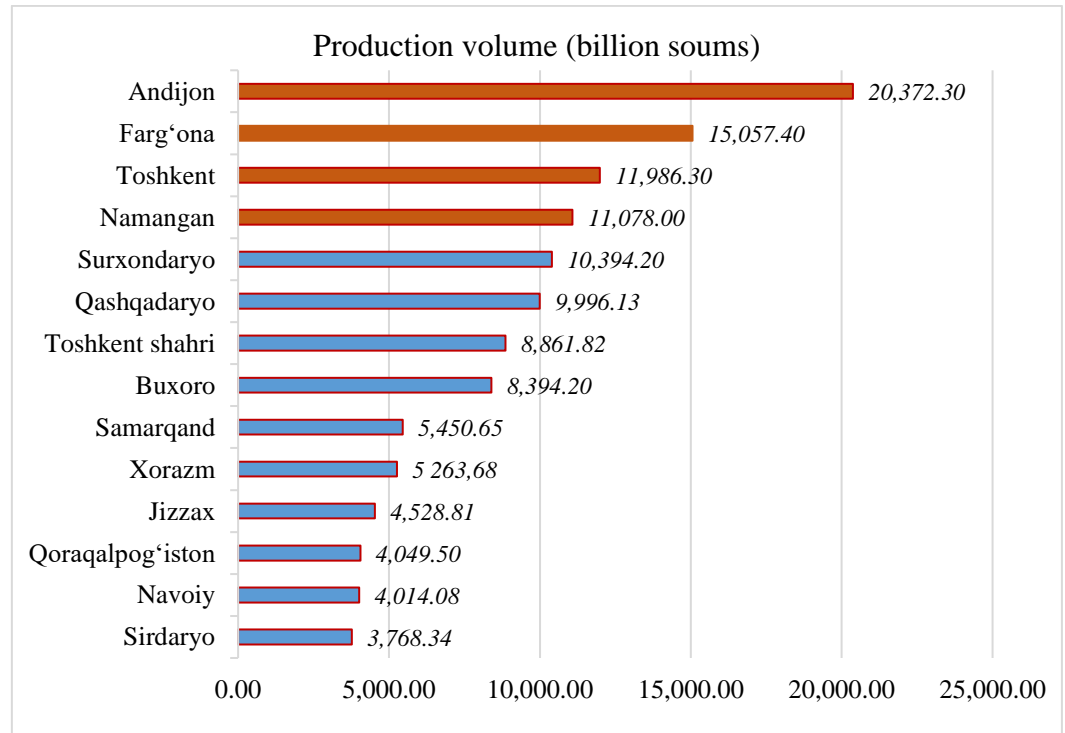


Figure 2. Textile production indicators by region of Uzbekistan.

According to the results of the analysis, high indicators in terms of production volume were observed in Andijan, Fergana, Tashkent and Namangan regions, where

production amounted to 15.1 trillion soums and 12.0 trillion soums, respectively. These regions are characterized by a high level of economic activity, a developed industrial infrastructure, and the effective use of resources and labor potential. At the same time, there are also regions with relatively low production indicators[9].

Analysis of textile exports in 2024 shows that export activity in this sector has developed at a high level in a number of regions of Uzbekistan. Andijan, Tashkent region, Tashkent city and Namangan regions, shown in red in the diagram, stand out as the leading export regions in the country, see figure 3.

Andijan region is the absolute leader in the country in terms of textile exports, amounting to 492.1 billion soums. This is due to factors such as the clustered industrial structure of the region, a high proportion of businesses specializing in exports, cheap and abundant labor resources, and proximity to foreign markets, especially Kyrgyzstan and Kazakhstan.

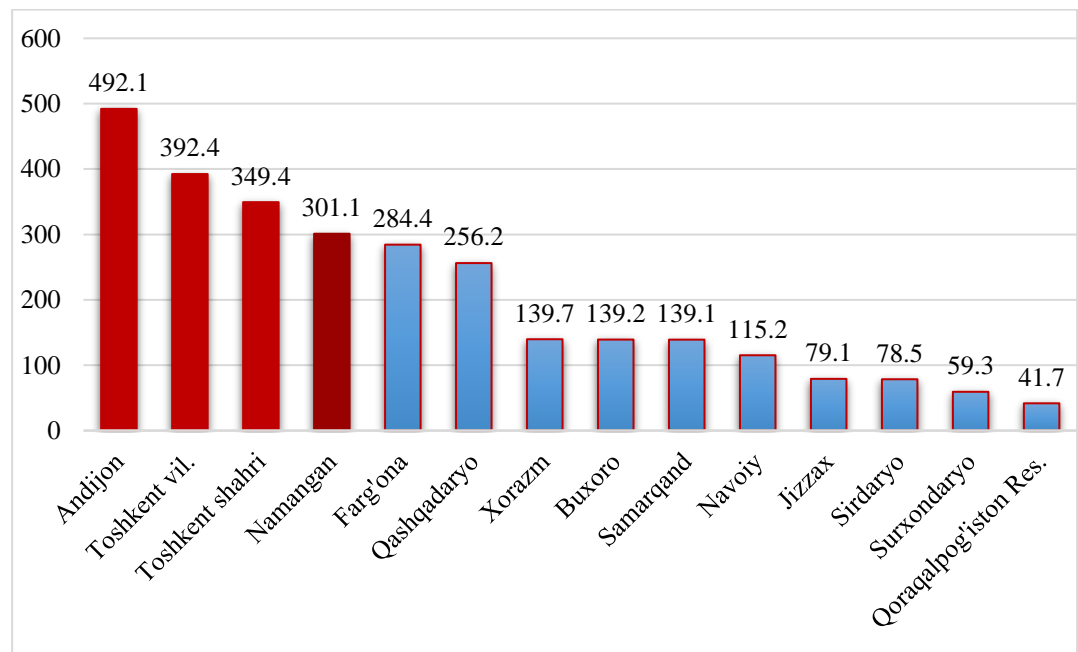


Figure 3. Regional analysis of textile exports by region of Uzbekistan.

The introduction of production processes in accordance with international standards also ensures the competitiveness of products[10]. Tashkent region, as an industrialized region with exports of 392.4 billion soums, plays an active role in the production of export-oriented textile products. Large production clusters, processing businesses, and technical and logistical infrastructure are well developed here. In addition, the active attraction of foreign investments and rapid adaptation to market requirements are strengthening the export potential of the region[11].

At the same time, export indicators in some regions remain relatively low. In particular, the export volume in the Republic of Karakalpakstan (41.7 billion soums), Surkhandaryo (59.3 billion soums), Syrdaryo (78.5 billion soums) and Jizzakh (79.1 billion soums) regions is insufficient. This situation is due to a number of factors:

1. **Infrastructure constraints.** In these regions, the lack of industrial zones, logistics centers, export terminals, and international trade infrastructure limits export opportunities. High transport and logistics costs make it difficult to enter foreign markets[12].
2. **Low level of investment attraction.** The production of export-oriented products requires investments in technologically advanced equipment, raw material capacity,

energy supply, and international certification systems. In regions with low indicators, the investment climate and banking and financial services are not sufficiently developed[13].

3. *Low specialization of production.* In some regions, high dependence on agriculture still remains, and the level of industrialization is low. As a result, the processing sector is underdeveloped and there is a shortage of finished products for export.
4. *Low human resources and insufficiently developed business culture.* For export-oriented activities, entrepreneurs must have sufficient knowledge and skills in international market requirements, trade agreements, standards and quality certificates. In regions with low indicators, the human resources in this area are not sufficiently developed[14].
5. *Geographical location and proximity to markets.* While Tashkent, the Fergana Valley and border regions are relatively close to foreign markets, some internal regions are far from export networks. This negatively affects logistics costs and times.

Based on the above analysis, inter-regional asymmetries in export volumes indicate that there is still inequality in regional economic development in the country[15]. Therefore, in regions with low indicators, measures should be taken in a timely manner to develop export infrastructure, accelerate industrialization policies, support the introduction of international standards, and develop services that help businesses enter foreign markets. This will help to fully utilize export potential and achieve sustainable growth in the foreign trade balance of the national economy.

4. Conclusion

The analysis shows that regions with high production volumes have a number of economic and institutional advantages. In particular, firstly, textile clusters are operating effectively in these regions, which leads to the formation of a production chain from raw materials to finished products within the internal territory, secondly, the abundance of labor and the possibility of effective use of labor resources create the basis for the rapid development of this sector, thirdly, the development of transport and logistics infrastructure ensures effective integration with domestic and foreign markets, fourthly, the attraction of foreign and local investments contributes to the technological modernization of industrial enterprises in the regions. This, in turn, indicates the need to further develop the role of state policy and targeted programs in the territorial development of the textile industry. In the current situation, specific measures are required to develop network infrastructure, improve logistics conditions, and create small clusters in areas with low potential, such as Syrdarya, Navoi, Karakalpakstan, and other regions.

In conclusion, the territorial structure of textile production indicates the imbalance in the country's economic development. In this situation, it is advisable to ensure territorial equality, activate the economy of regions with low potential, and expand export potential by diversifying production in the sector. At the same time, we believe that it is necessary to increase the export of competitive products by supporting innovative production in regions with high potential.

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