



Analysis of Textile Industry Development in Uzbekistan

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Annotation

Sustainable growth can be explained as a result of ongoing reforms in the industry, modernization, technical and technological renewal and diversification of production. In order to further accelerate the ongoing reforms in the textile industry and achieve economic efficiency, it would be expedient, first of all, to study and analyze the experience of developed countries in the textile industry.

Keywords: textile industry, export, import, industry, world market, diversification.

Today, the textile industry plays an important role in the economy of Uzbekistan as a leading sector. The third direction of the new development strategy of Uzbekistan - the priorities for the development of the national economy, its growth rates at the level of modern requirements - can be assessed as an integral continuation of the reforms launched within the priorities of the Action Strategy for economic development and liberalization.

In particular, a number of decisions were made to further stimulate investment in the textile industry, to rationally locate the enterprises of the sector on the basis of the availability of its own reliable raw material base for cotton growing:

- ✓ organization of modern productions with the completed technological cycle of cotton fiber processing;
- ✓ Production of high quality, competitive textile goods with high added value;
- ✓ Ensuring the export of textiles in the amount of at least 80% of manufactured products;
- ✓ Placement of textile enterprises, first of all, in districts with high level of untapped labor resources.

[1]

In the framework of the Action Strategy for 2017-2021, strategies for the development of leading industries (textile, electrical, automotive, construction materials, chemical and petrochemical industries, agricultural machinery, energy) were adopted.

In particular, in the textile industry, low and stable inflation rates in this industry are an important factor in maintaining a balance in economic growth, as well as in increasing the competitiveness of production and living standards. In this context, the reduction and stabilization of price growth rates should be one of the main goals of state economic policy.

It is important to further increase employment, income and living standards through the rational use of natural resources, production and labor potential in the regions, the rapid development of industries. Competition in the textile industry has always been active, and the textile industry has a number of advantages that can help boost the country's economy. Exports of textiles and garments are an important source of foreign exchange earnings. Countries aim to capture the global market to provide platforms for global business. The following table shows the results of the countries that are leaders in the textile industry.

Table 1.

Exports of leading countries in the textile industry¹

№	Country name	Occupied space	Export volume (billion dollars)
1.	China	1	266,41
2.	Germany	2	38,99
3.	Bangladesh	3	38,73
4.	Vietnam	4	37,93
5	India	5	37,11
6	Italy	6	36,57
7	Turkey	7	27,56
8	United States	8	27,14
9	Hong Kong	9	20,43
10	Spain	10	20,20

China is the world's leading textile producer and exporter. China's export value in 2020 was about \$ 266.41 billion. Factors such as cheap production, superior raw materials, industrial infrastructure, advanced technology, well-organized business processes in domestic and world markets have contributed to the development of the textile industry. The eight main categories of China's textile industry include cotton fabrics, silk fabrics, chemical fabrics, wool fabrics, knitted fabrics, textile machinery, fibers and garments. The industry is growing every day and the government is supporting the growth of the industry.

With an export value of \$ 38.99 billion, **Germany** is the world's second largest textile exporter after China. The country dominates the export of synthetic yarn, knitted garments and man-made fibers. Most of the industry in Germany covers small and medium businesses. Special attention is paid to the production of high quality textiles in the country. If in 1980 the share of Chinese products in world textile exports was 4.62%, and in world clothing exports - 4%, by 2004, these figures increased to 17.17% and 23.97%, respectively. [2] In recent years, the demand for textiles and clothing has been gradually increasing even in the domestic provinces of the state [3].

Bangladesh has emerged as a well-known competitor in the textile and clothing industry. The low labor force and large labor force allowed Bangladesh to become the third largest exporter of textiles and clothing in the world. Bangladesh's export value is estimated at \$ 38.73 billion in 2020. The country ranks 2nd in terms of textile exports of western fast fashion brands and dominates in bulk order. Bangladesh's vertical capabilities help global brands maintain more coordination and transparency in their supply chain.

Vietnam is the fourth largest exporter of textiles in the world and has a rich history of high quality production. Vietnam has many advantages such as skilled labor and low wages. Vietnam mainly exports to countries such as Japan, the United States, South Korea and the European Union. By 2020, Vietnam's export value will reach \$ 37.93 billion. The country's main focus is on producing high quality products and improving its supply chain to stay in a competitive market.

India has the oldest textile industry in the world. Today, India ranks fifth in the global textile export business, with an export value of \$ 37.11 billion. India has the advantage of domestic supply of fabric, it is the second largest cotton producer in the world and produces some unique silk fibers. There

¹ <https://data.worldbank.org/country>

are two textile sectors in India, one unorganized handicrafts and handicrafts and the other mechanized. The first works with traditional tools, instruments, and methods. India has improved significantly in terms of technology in recent years and is emerging as a global competitor in the production of quality textiles and clothing.

Italy's export value in 2020 is estimated at \$ 36.57 billion. Italy has a wide range of advantages in the range of fibers - linen, cotton, wool and silk. Italy produces textiles with a strong export orientation. The main focus is on the technical performance of fabrics and yarns. The country has a promising area and inclination for innovation and can develop further in the future.

Turkey can always meet high standards and satisfy a large range of products. As an important player in the global supply chain, Turkey is the seventh largest exporter of textiles and clothing in the world. The 2020 report puts Turkey's export value at \$ 27.56 billion. Turkey has a favorable environment for textile production with high-tech solutions, design strength, dynamic and flexible production.

Products such as textile raw materials, clothing, home appliances, yarn and fabrics are exported by the U.S., making it the 8th strongest competitor in the textile export market. **U.S.** exports are valued at \$ 27.14 billion, according to a 2020 report. The medical and industrial textile and protective clothing industries are booming in the United States. Large investments in technology have enabled the industry to produce high quality textile products.

Hong Kong has a strong reputation for its dyed and printed fabrics. The country is one of the leading countries in the production and export of denim fabric weaving, cotton spinning, fine caliber knitwear, knitted panel knitwear. Hong Kong produces the best quality textiles and clothing, making it the 9th largest exporter. The country's export value is estimated at \$ 20.43 billion.

Spain is striving for elegance in the textile industry. It is the 10th largest exporter of textiles in the world and one of the leading companies exporting and manufacturing spinning, weaving, decorating, dyeing and apparel products. Spain's production capacity is closely linked to a skilled workforce. Spain's export value is estimated at \$ 20.20 billion.

The production of textiles and clothing in the Republic of Uzbekistan has a small share in total production. However, this sector of industry retains a well-known export potential, measured by the share of exports in the country's total exports. In recent years, there has been a positive trend in the growth of its exports, with changes in international trade for most of the post-crisis period and much higher than the increase in imports of textile products to the EU market. [4]

The education system, which is the personnel base of the textile industry, has been preserved in the field of higher education as well as its secondary education system. The current development of this system will be seriously ensured by a highly educated and relatively inexpensive workforce by developing dual education and linking it more closely to the needs of the textile industry. However, there are problems such as the lack of specialized research and development institutions, which are the basis for intensive development to adapt and partially mimic the business strategies of local manufacturers.

Table 2: The share of the textile industry in the manufacturing industry of the Republic of Uzbekistan in 2014-2021 ²

Products	2014	2015	2016	2017	2018	2019	2020	2021
Manufacture of textile products	15,9	16,9	14,6	13,9	13,1	11,8	12,0	13,7

² Author's development on the basis of official data of the State Statistics Committee of the Republic of Uzbekistan.

Garment production	1,9	2,0	4,7	5,1	4,1	3,6	3,4	3,5
Manufacture of leather and leather products	0,8	1,0	1,1	1,2	0,9	0,6	0,5	0,5
Textile industry - total	18,6	19,9	20,4	20,2	18,1	16	15,9	17,7

The analysis of the table data shows that the changes in the interval from 2014 to 2021 increased in 2014-2015, while in the period from 2020 to 2021 they increased by 1.7. The highest growth rates in the above 3 areas increased by 2.7% in the garment industry in 2015-2016.

Table 3: Growth rates of industrial output per capita (in percent))³

Regions	2014	2015	2016	2017	2018	2019	2020	2021
Republic of Uzbekistan	102,8	103,5	103,6	103,4	108,9	103,0	98,9	106,6
The Republic of Karakalpakstan	106,6	119,6	162,0	106,7	102,7	103,5	101,1	106,0
Andijon	103,6	85,4	71,6	121,4	128,4	112,6	104,3	96,7
Bukhara	106,5	107,0	103,1	95,6	100,4	108,8	100,1	98,8
Jizzax	107,5	114,8	118,8	109,2	106,8	101,3	115,9	107,9
Qashqadaryo	101,3	100,4	99,9	103,0	102,2	92,1	101,0	113,1
Navoi	101,5	99,4	99,6	96,0	99,6	102,5	107,3	105,1
Namangan	110,8	109,7	109,8	109,7	108,8	108,2	112,9	115,5
Samarkand	111,7	108,4	106,5	100,1	110,1	103,4	103,4	108,6
Surxondaryo	108,7	105,2	104,2	95,9	103,8	104,7	104,5	109,1
Sirdaryo	102,8	103,7	110,0	90,3	102,5	101,3	99,1	116,3
Tashkent	103,9	104,3	104,3	101,5	113,4	105,8	104,8	113,9
Fergana	107,1	102,2	99,9	93,4	104,6	100,8	102,3	106,4

³ Stat.uz

Khorezm	119,3	123,9	90,4	116,3	106,2	105,7	104,4	115,5
Tashkent city	114,8	111,1	110,3	110,2	108,3	103,3	96,4	106,7

In recent years, due to the state's support of the textile industry, modern textile enterprises have been established in the country to produce high-quality, competitive products. As a result, the volume of production in the industry and exports of textile products that meet international standards are growing steadily.

However, there are a number of problems in the industry that need to be addressed, and since many of our garments have “Made in Turkey” or “Made in China” labels, we often assume that the textile industry is not in our country but in other countries. The textile industry of Uzbekistan has created 53,977 jobs and the country's exports of textiles and clothing amounted to \$ 993.7 million. While working conditions in the textile industry in the country are much better than they were 10 years ago, workers around the world face a variety of health risks due to their working conditions or occupations.

Effects of toxic chemicals

Workers in the textile industry are exposed to hazardous chemicals. If workers work in the textile dyeing, printing or finishing industry, it is part of the business. Employees work with luminaires and fixatives, formaldehyde-releasing corrosion-resistant substances, flame retardants with toxic compounds, and antimicrobial agents. Exposure to formaldehyde is associated with a variety of cancers, including thyroid, nose, stomach, and esophageal cancers. Chemicals can also cause eczema and dermatitis.

High noise levels

Exposure to high levels of noise is common in textile mills, especially in developing countries where machinery is obsolete. This has led to hearing loss in many textile workers, as well as sleep disorders, changes in blood pressure, anxiety and other illnesses. A study among textile workers in Nagpur, India, found that 76.6 per cent of them were at risk of hearing loss due to noise in the work environment.

Bad working conditions

The news details the difficult conditions of the garment factory. A fire at a garment factory in Bangladesh in 2012, which claimed the lives of 112 workers, tragically demonstrated the terrible conditions of the industry. Eventually, the factory owners were charged with murder for their crimes. The following year, an entire building collapsed in Bangladesh, killing 1,100 workers.

Working conditions can lead to poor ergonomics.

Many seamstresses suffer from diseases of the musculoskeletal system such as carpal tunnel syndrome and often suffer from diseases such as wrist tendonitis, back pain, neck pain, shoulder pain and osteoarthritis of the knee. All of these cases are caused by repetitive movements and poor ergonomic conditions. These problems are more common in developing countries, but can also occur in the U.S. garment industry.

Cotton dust can cause breathing problems

Workers working with cotton have a specific problem: exposure to large amounts of cotton dust along with pesticides and soil particles. Such exposure can lead to respiratory distress and fatal byssinosis, commonly known as brown lung disease, which results in chest tightness, coughing, wheezing, and shortness of breath.

Industrial waste

The textile industry is notorious for wasting a lot of resources, especially water. In the past, entire ecosystems were polluted, but modern companies are working on a relatively clean way of doing business. Advanced companies are reducing water consumption, changing the chemicals they use in dyeing processes, and reusing water for two or more processes, all to reduce their impact on the local environment.

While the stereotype of bad environmental practices in the textile industry is focused on overseas production, American workers face the same health risks in their factories. Although some companies are working to improve conditions, there are still risks for a large number of textile workers.

Smaller scale problems include a narrow work environment with poor lighting and ventilation. Problems in sewing factories can range from a slight inconvenience to extremely dangerous situations.

In conclusion, the experience of leading foreign countries in this field shows that the need to define a new, long-term, self-sustaining and separate growth model is aimed at accelerating growth and increasing competitiveness, especially in the manufacturing industry, as well as the economy and development. focuses on changing the structure.

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