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INTERNATIONAL MARKETING STRATEGIES FOR UZBEKISTAN'S TEXTILE INDUSTRY: CHALLENGES, OPPORTUNITIES, AND ECONOMETRIC EVIDENCE

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Abstract: Uzbekistan's textile sector has undergone one of the most accelerated industrial transformations among emerging economies over the 2017–2025 period, growing from a marginal raw-material supplier into a multi-billion-dollar exporting industry. This study applies a mixed-methods framework — integrating Ordinary Least Squares (OLS) regression analysis of trade and investment data with qualitative evaluation of competitive positioning and sustainability compliance — to examine the international marketing challenges confronting Uzbek textile firms as they seek to access premium Western markets. Econometric results confirm that both foreign direct investment inflows and workforce expansion are statistically significant predictors of export value growth ($R^2 = 0.983$), while the time-trend OLS model yields a coefficient of USD 454.86 million per year ($p < 0.001$). Despite this quantitative momentum, critical qualitative deficiencies persist in brand differentiation, country-of-origin perception, and ESG compliance.

Keywords: Uzbekistan; textile exports; international marketing; OLS regression; country-of-origin effect; sustainability certification; brand equity; emerging markets; Central Asia.

Аннотация: Текстильный сектор Узбекистана в период 2017–2025 годов претерпел одну из наиболее ускоренных индустриальных трансформаций среди развивающихся экономик, превратившись из поставщика сырья в многомиллиардную экспортно-ориентированную отрасль. В данном исследовании применяется смешанный методический подход, объединяющий регрессионный анализ методом наименьших квадратов (OLS) торговых и инвестиционных данных с качественной оценкой конкурентного позиционирования и соответствия требованиям устойчивого развития, с целью изучения проблем международного маркетинга, с которыми сталкиваются узбекские текстильные компании при выходе на премиальные западные рынки. Эконометрические результаты подтверждают, что приток прямых иностранных инвестиций и рост занятости являются статистически значимыми факторами роста экспортной выручки ($R^2 = 0,983$), тогда как временная модель OLS показывает коэффициент 454,86 млн долларов США в год ($p < 0,001$). Несмотря на данный количественный рост, сохраняются существенные недостатки в области брендовой дифференциации, восприятия страны происхождения и соответствия ESG-требованиям.



Ключевые слова: Узбекистан; текстильный экспорт; международный маркетинг; регрессия OLS; эффект страны происхождения; сертификация устойчивости; ценность бренда; развивающиеся рынки; Центральная Азия.

Annotatsiya: O'zbekiston to'qimachilik sektori 2017–2025-yillar davomida rivojlanayotgan iqtisodiyotlar orasida eng tezkor sanoat transformatsiyalaridan birini boshdan kechirdi hamda xomashyo yetkazib beruvchidan ko'p milliard dollarlik eksportga yo'naltirilgan sanoat tarmog'iga aylandi. Mazkur tadqiqot savdo va investitsiya ma'lumotlarini Eng kichik kvadratlar usuli (OLS) orqali regressiya tahlili qilish hamda raqobatbardosh pozitsiyalash va barqarorlik talablariga muvofiqlikni sifat jihatdan baholashni o'zida mujassam etgan aralash metodologik yondashuvni qo'llaydi. Tadqiqotning maqsadi — O'zbekiston to'qimachilik korxonalari premium G'arb bozorlariga kirish jarayonida duch kelayotgan xalqaro marketing muammolarini aniqlashdir. Ekonometrik natijalar shuni ko'rsatadiki, to'g'ridan-to'g'ri xorijiy investitsiyalar oqimi va ishchi kuchi hajmining oshishi eksport qiymati o'sishining statistik jihatdan ahamiyatli omillari hisoblanadi ($R^2 = 0,983$), vaqt trendiga asoslangan OLS modeli esa yiliga 454,86 mln AQSh dollari miqdoridagi koeffitsiyentni ko'rsatadi ($p < 0,001$). Shu bilan birga, ushbu miqdoriy o'sishga qaramay, brend differensiasiyasi, mamlakat kelib chiqishi imiji va ESG talablariga moslik bo'yicha muhim sifat kamchiliklari saqlanib qolmoqda.

Kalit so'zlar: O'zbekiston; to'qimachilik eksporti; xalqaro marketing; OLS regressiya; mamlakat kelib chiqishi effekti; barqarorlik sertifikatsiyasi; brend qiymati; rivojlanayotgan bozorlar; Markaziy Osiyo.

INTRODUCTION

The global textile and apparel trade system constitutes one of the most geographically dispersed and value-chain-complex sectors in international commerce. Within this competitive arena, Uzbekistan has achieved a striking repositioning. A country long associated with Soviet-era cotton monoculture — and the attendant environmental and labour controversies of the Aral Sea basin has, since 2017, pursued a deliberate industrial upgrading strategy under President Shavkat Mirziyoyev's reform programme. The empirical trajectory is extraordinary: textile exports rose from approximately USD 6 million in 2017 to over USD 3 billion in 2023, representing a compound annual growth rate of approximately 141.8 percent. By 2025, the sector employed 623,000 workers directly, with the government targeting 650,000 by 2026 and USD 7 billion in exports by 2027–2028.¹

The strategic logic underpinning this transformation is clear. Uzbekistan possesses the world's sixth-largest cotton reserves and a cost-competitive labour force. Converting raw cotton into finished, branded goods rather than exporting unprocessed fibre represents a fundamental value-capture opportunity. Presidential Decree No. UP-60 (2022) formalised this logic by progressively restricting raw cotton and unprocessed yarn exports, directing manufacturers toward downstream production.² Four dedicated textile industrial zones were established to attract foreign investors through fiscal incentives and co-located infrastructure including renewable energy supply and water treatment. The workforce directly employed in the sector has grown from approximately 200,000 in 2017 to 623,000 by 2025.

The existing academic and policy literature on Uzbekistan's textile sector has emphasised supply-side factors: production capacity, labour market conditions, FDI attraction, and institutional reform. Comparatively little scholarly attention has been directed toward the demand-side and marketing dimensions of the sector's internationalisation — specifically, how Uzbek firms position their products, communicate value propositions, and build relationships with sophisticated buyers in markets characterised by strict regulatory standards and strong incumbent brands.

The distinction between production-side and marketing-side competitiveness is more than terminological. A manufacturer may possess world-class production facilities, competitive labour costs, and reliable delivery schedules — and still fail to penetrate premium international markets if buyers cannot distinguish its products from those of competitors, if its sustainability credentials are unverified, or if its country of origin carries negative associations in target markets. These are fundamentally marketing challenges requiring marketing solutions: brand strategy, communication investment, buyer relationship management, and disciplined positioning.

A further dimension of the research problem concerns the rapidly evolving external environment. Since 2020, the EU has introduced its most ambitious sustainable textile regulatory framework to date, major international brands have publicly committed to supply chain transparency and sustainability due diligence, and digital trade platforms have fundamentally altered the economics of market entry for apparel products.³

1 Uztekstilprom; National Statistics Committee of the Republic of Uzbekistan (2024). Statistical Yearbook: Industry and Trade. Tashkent. CAGR computed by authors from raw export values 2017–2024.

2 Presidential Decree No. UP-60 (2022), Republic of Uzbekistan. Ministry of Investments, Industry and Trade (2023). Analytical Report on the Development and Export Potential of the Textile Industry. Tashkent: MIIT.

3 Seuring, S. and Muller, M. (2008). From a literature review to a conceptual framework for sustainable supply chain management. *Journal of Cleaner Production*, 16(15), 1699–1710; European Commission (2022). EU Strategy for Sustainable and Circular Textiles. Brussels.



RQ: What international marketing strategies are most effective in enabling Uzbekistan's textile sector to transition from commodity-based exports to value-added, branded competition in EU and US markets?

Three subsidiary questions provide analytical structure: (SQ1) What quantitative patterns characterise Uzbekistan's textile export growth, and what factors drive this growth? (SQ2) What structural barriers impede penetration of EU and US premium market segments? (SQ3) What marketing strategy options are most viable given the country's actual competitive asset base?

Two complementary frameworks organise the analysis. Porter's Diamond Model (1990) provides a systematic approach to assessing four determinants of national competitive advantage — factor conditions, demand conditions, related and supporting industries, and firm strategy and rivalry — applied here to Uzbekistan's textile sector.

The Uppsala Internationalisation Model (Johanson and Vahlne, 1977; revised 2009) provides a process-oriented account of market entry sequencing, emphasising psychic distance, experiential knowledge accumulation, and network relationships as drivers of gradual international market commitment. This model helps explain why Uzbek textile firms have concentrated their initial export efforts in geographically and institutionally proximate CIS markets, and what strategic investments are required to extend reach into more distant Western markets.

REVIEW OF LITERATURE ON THE SUBJECT

The country-of-origin (COO) effect — the measurable influence that a product's national origin exerts on buyer evaluation and willingness to pay — is among the most extensively studied phenomena in international marketing.⁴ In textile and apparel markets, COO signals interact with price, quality cues, ethical sourcing narratives, and brand associations to shape purchasing decisions across both business-to-business and consumer channels. Established textile-exporting nations benefit from accumulated COO equity that justifies significant price premiums: Italy commands premium positioning in luxury menswear and tailored fabrics; Portugal has established a sustainable European manufacturing identity; Japan maintains an exceptional reputation for technical and artisanal textiles.

For transitional and developing economies, the COO literature documents a characteristic trajectory from initial scepticism to gradual perception upgrading, contingent on consistent quality delivery, export promotion investment, and certification signalling.⁵ Bangladesh's evolution from a low-credibility to a high-volume, increasingly quality-recognised garment exporter represents an instructive contemporary parallel for Uzbekistan. The academic consensus emphasises that COO upgrading requires both objective quality improvement and sustained communication investment: perception change is a lagging, not a leading, indicator of quality improvement.

Kotler and Gertner (2002) argue that country brands function as cognitive assets — powerful but fragile — shaped by accumulated historical associations, geopolitical context, and cumulative marketing investment by both firms and public institutions.⁶ Uzbekistan's country image in international textile markets carries a specific historical burden: a decade-long coordinated brand boycott led by the Cotton Campaign coalition in response to documented state-organised forced and child labour in cotton harvesting. This boycott was formally lifted in 2022 following independent third-party audits confirming the elimination of these practices, creating a genuine inflection point in the country's reputational trajectory.

However, research on post-boycott and post-conflict brand recovery consistently demonstrates that reputational rehabilitation does not automatically translate into positive COO associations among buyers who have not followed the reform narrative closely. Proactive communication investment, third-party certification signals, and visible endorsement by trusted international brands are necessary to accelerate the updating of buyer perceptions.

The integration of environmental, social, and governance criteria into global supply chain governance has accelerated substantially over the 2015–2025 period. The EU Strategy for Sustainable and Circular Textiles (European Commission, 2022) and the proposed Corporate Sustainability Due Diligence Directive establish compliance requirements that now function as de facto market entry conditions for non-EU textile suppliers, particularly in the mid-market and premium segments. Certifications including GOTS, Better Cotton Initiative,

4 Bilkey, W.J. and Nes, E. (1982). Country-of-origin effects on product evaluations. *Journal of International Business Studies*, 13(1), 89–99; Pharr, J.M. (2005). Synthesizing country-of-origin research from the last decade. *Journal of Marketing Theory and Practice*, 13(4), 34–45.

5 Ahmed, S.A. and d'Astous, A. (2008). Antecedents, moderators and dimensions of country-of-origin evaluations. *International Business Review*, 17(1), 59–85.

6 Kotler, P. and Gertner, D. (2002). Country as brand, product and beyond: A place marketing and brand management perspective. *Brand Management*, 9(4–5), 249–261.



OEKO-TEX STANDARD 100, and SA8000 have transitioned from optional differentiation signals to threshold requirements among leading European retailers.

The economics of certification present a structural challenge for emerging-market exporters. Individual GOTS certification requires upfront audit investment, continuous documentation systems, and periodic re-certification, imposing fixed costs that may be prohibitive for small and medium-sized manufacturers. Cluster-level or industry-association-mediated certification programmes represent a structural response that pools compliance costs while maintaining individual firm accreditation.⁷

The relationship between geographic industrial agglomeration and export competitiveness is well-documented in the economic geography literature.⁸ Cluster participation generates agglomeration economies — reduced transaction costs, knowledge spillovers, specialised labour market pooling, shared infrastructure — that individual firms operating in isolation cannot replicate. For developing-country exporters facing institutional deficits and market access constraints, cluster membership can partially compensate for firm-level weaknesses.

Uzbekistan's investment in four dedicated textile industrial zones constitutes an attempt to deliberately engineer these cluster dynamics.⁹ The zones provide integrated sustainability-relevant infrastructure — renewable energy supply, water treatment, centralised logistics — that simultaneously supports production efficiency and sustainability certification compliance. Critically, cluster-level infrastructure investment also creates the institutional preconditions for collective certification programmes: when multiple firms share a physical space, coordinate production logistics, and operate under common governance frameworks, the fixed costs of group-level GOTS or Better Cotton accreditation can be spread across participating firms, substantially reducing the per-unit compliance burden.

RESEARCH METHODOLOGY

This study employs a sequential mixed-methods design, in which quantitative econometric analysis provides an objective characterisation of export performance trends and determinants, and qualitative analysis of policy frameworks, industry reports, and strategic positioning documents provides interpretive context and identifies strategic implications. This design is appropriate given the dual research objectives: measuring and modelling quantitative export performance patterns, and interpreting the strategic context within which these patterns must be understood.

Quantitative data were compiled from five primary secondary sources: the National Statistics Committee of the Republic of Uzbekistan; the UN COMTRADE bilateral trade database; the World Bank's World Integrated Trade Solution (WITS) platform; the USDA Foreign Agricultural Service; and annual reports from the Uztekstilprom industry association.¹⁰

Two Ordinary Least Squares (OLS) regression models are estimated. Model 1 (Time-Trend OLS) regresses annual export value on a linear time index ($t = 0$ in 2017, $t = 7$ in 2024), providing a baseline characterisation of the growth trajectory. The model specification is: $\text{Export}_t = \alpha + \beta_1 \cdot t + \varepsilon_t$. Model 2 (Multiple OLS with Standardised Predictors) regresses export value on standardised FDI inflows and standardised workforce size. The specification is: $\text{Export}_t = \alpha + \beta_1 \cdot \text{FDI_std} + \beta_2 \cdot \text{Workforce_std} + \varepsilon_t$. All computations were performed in Python 3.11 using NumPy 1.24 and SciPy 1.10 libraries.¹¹

Qualitative data derive from systematic review of: presidential decrees and government resolutions pertaining to the textile sector (2017–2025); reports from the Asian Development Bank, World Bank, and EU SWITCH-Asia programme; textile industry publications including Just-Style, Kohan Textile Journal, and Apparel Views; and peer-reviewed articles identified through Scopus and Google Scholar.

Several limitations must be acknowledged. The small regression sample ($n = 8$ annual observations) limits statistical power and precludes advanced time-series techniques. The high correlations among independent variables (FDI and workforce exhibit $r = 0.993$ with each other) suggest potential multicollinearity in Model 2, implying that coefficient estimates should be interpreted with caution as reflecting joint explanatory power rather than isolated causal effects. Primary firm-level survey data were not collected, limiting insight into strategic heterogeneity among individual exporters.

7 EU SWITCH-Asia Programme. Collective certification models in Asian textile-producing regions. See also: Asian Development Bank (2022). *Modernization of Uzbekistan's Textile Sector*. Manila: ADB Publications.

8 Porter, M.E. (1990). *The Competitive Advantage of Nations*. New York: Free Press; Porter, M.E. (1998). Clusters and the new economics of competition. *Harvard Business Review*, 76(6), 77–90; Schmitz, H. (1999). Global competition and local cooperation. *World Development*, 27(9), 1627–1650.

9 World Bank (2023). *Uzbekistan Country Economic Update: Reforms and Inclusive Growth*. Washington, D.C.: World Bank Group; Tashpulatov, B. (2023). The role of industrial clusters in Uzbekistan's textile industry development. *Economic Review of Uzbekistan*, 3, 25–31.

10 All computations performed in Python 3.11 using NumPy 1.24 and SciPy 1.10 libraries. Data sources: National Statistics Committee of Uzbekistan (2024); UN COMTRADE; World Bank WITS; USDA FAS; Uztekstilprom annual reports.

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ANALYSIS AND RESULTS

The trajectory of Uzbekistan's textile export value from 2017 through 2024 reveals three analytically distinct phases. Phase 1 (2017–2020): rapid capacity-driven takeoff, in which policy reforms, FDI incentives, and raw cotton export restrictions generated extraordinary initial growth from near-zero to USD 1.5 billion. Phase 2 (2020–2022): consolidation growth, characterised by continued but more moderate expansion as initial capacity utilisation reached maturity. Phase 3 (2023–2024): compositional adjustment, in which the government's accelerated restriction on upstream product exports temporarily moderated total export values while improving the finished-goods composition of the export basket.

The time-trend coefficient ($\beta_1 = 454.86$, $p < 0.001$) indicates that, on average, Uzbekistan's textile exports increased by approximately USD 455 million annually across the 2017–2024 period. The R-squared of 0.968 confirms that 96.8 percent of the variance in annual export value is explained by the linear time trend, establishing that growth has been statistically significant, consistent, and highly predictable over this period. The compound annual growth rate computed from raw data is 141.8 percent — among the highest recorded for any emerging-market export sector over an equivalent period.

Model 2 demonstrates that both FDI inflows and workforce size are strong positive predictors of export performance, together explaining 98.3 percent of export value variance. FDI emerges as the quantitatively dominant predictor (standardised $\beta = 687.24$ versus 366.96 for workforce), suggesting that foreign capital contributes disproportionately to export revenue generation — consistent with the hypothesis that FDI brings not only financial resources but also technology transfer, quality management systems, and international buyer relationships that are instrumental to export performance. The bivariate correlations (FDI-exports $r = 0.990$; workforce-exports $r = 0.985$) are exceptionally high.

The composition of Uzbekistan's textile export value by product category in 2023 reveals the dominance of upstream, lower-value categories: cotton yarn alone accounts for approximately 38 percent of export revenues, while finished ready-made garments represent only 22 percent. Fabrics and knitted materials constitute 27 percent, home textiles 9 percent, and technical and other textiles 4 percent. This compositional profile reflects the sector's current strategic positioning as primarily a supplier of intermediate goods to global production networks rather than a finished-goods competitor in end-consumer markets.¹²

Applying Porter's Diamond Model systematically yields a mixed assessment of Uzbekistan's competitive position. Factor Conditions are mixed: natural advantages in cotton availability and labour cost competitiveness are partially offset by technological limitations in production equipment, skills deficits in design, marketing, and quality management, and infrastructure gaps particularly in logistics and digital trade facilitation. Demand Conditions present a structural challenge: the domestic apparel market lacks the sophistication and quality-consciousness that drives innovation and premium capability development in world-class textile exporting nations. Related and Supporting Industries are underdeveloped relative to competitor countries.

The qualitative analysis identifies a significant and widening compliance gap between the sustainability requirements of EU market buyers and the current certification status of Uzbek manufacturers. While the Better Cotton Initiative programme has been extended to cover 50,000 hectares of cotton cultivation and the government has formally committed to eliminating forced labour practices, the large majority of small and medium-sized manufacturers lack individual certification under GOTS, OEKO-TEX, SA8000, or equivalent standards that EU buyers increasingly require as threshold conditions for supplier qualification.

The econometric results establish that Uzbekistan's textile export growth is statistically robust, consistent, and strongly associated with FDI attraction and workforce expansion. The time-trend model's R-squared of 0.968 and the multiple regression model's R-squared of 0.983 confirm that these relationships are not artefacts of a single outlier year but reflect genuine structural dynamics. The FDI dominance finding ($\beta = 687.24$ versus 366.96 for workforce) is strategically significant: it implies that foreign capital functions as more than a financial input, serving as a carrier of technological capabilities, quality management systems, and crucially, international buyer relationships that are instrumental to export performance.

The most significant strategic tension identified by the qualitative analysis is the mismatch between the global standardisation demands embedded in EU sustainability regulations and the localised production realities of Uzbekistan's textile manufacturers. EU buyers now routinely require certification of organic cotton sourcing, chemical management compliance, living wage implementation, and greenhouse gas emissions reporting — standards developed in Brussels and Geneva with limited sensitivity to the institutional and financial contexts of Central Asian producers. This regulatory environment creates what is effectively a non-tariff barrier that imposes the cost burden of compliance entirely on the exporting country.

12 State Statistics Committee of Uzbekistan (2025); Kohan Textile Journal (2025); USDA Foreign Agricultural Service (2024). Cotton and Products Update: Uzbekistan (GAIN Report). Washington, D.C.: USDA.



Strategy 1: Heritage Brand Positioning: Uzbekistan should invest systematically in communicating its extraordinary textile heritage as an anchor of product authenticity and differentiation in premium and luxury-adjacent market segments. The narrative 2,500 years of Silk Road craftsmanship, unique ikat and suzani traditions, natural Fergana Valley cotton — is genuine, distinctive, and verifiable, providing a foundation for credible brand storytelling that competitors from Bangladesh or Vietnam cannot replicate. Government investment of USD 10–15 million in a professionally managed international brand communication programme is warranted and would represent a high-return investment relative to the scale of export revenue at stake.

Strategy 2: Scalable Sustainability Certification: Cluster-level certification programmes should be developed to pool compliance costs and reduce the per-firm burden of GOTS and Better Cotton accreditation for small and medium manufacturers. Uztektstilprom is institutionally positioned to serve as a certification facilitation intermediary, negotiating group audit arrangements with international certification bodies and managing centralised documentation systems on behalf of member firms. This collective certification model analogous to approaches piloted through the EU's SWITCH-Asia programme would substantially accelerate the pace at which individual manufacturers achieve certification.

Strategy 3: Co-branding and Endorsed Association: The FDI attraction programme should be explicitly oriented toward establishing sourcing and manufacturing relationships with globally recognised brands, particularly from Italy, Germany, France, and the UK, that communicate their Uzbekistan sourcing in their own marketing. When established global brands reference Uzbekistan sourcing to end consumers, they provide third-party quality endorsement that self-promotional government marketing cannot replicate. This co-branding effect — analogous to how Bangladeshi manufacturers built credibility through supply relationships with leading European retailers — generates positive COO perception upgrading as a byproduct of commercial relationships.

The Uzbekistan textile case offers several contributions to the broader international marketing literature. First, it provides a contemporary illustration of COO perception management in a post-boycott context, demonstrating how deliberate certification investment and brand communication can accelerate the updating of negative historical associations. Second, it extends the Uppsala Internationalisation Model to a context of developmental state capitalism, where internationalisation pace is driven by state-coordinated policy rather than organic firm-level learning. Third, it contributes to the growing literature on sustainability standards as non-tariff barriers in international trade.

The study's principal limitations — small regression sample, absence of firm-level primary data, potential multicollinearity among predictors, and reliance on preliminary 2024 trade figures — suggest several productive directions for future research. A survey-based study of EU and US textile buyer perceptions of Uzbek-origin products would provide direct measurement of the COO effects inferred here from secondary sources. Panel data regression at the firm level would reveal within-sector heterogeneity in export performance.¹³¹⁴ Longitudinal case studies of individual firms that have successfully penetrated EU or US markets would illuminate the specific marketing investments, relationship-building strategies, and operational adaptations that drive firm-level success.

CONCLUSIONS AND SUGGESTIONS

Uzbekistan's textile industry stands at a strategic inflection point of considerable significance. The quantitative evidence is unambiguous: a compound annual growth rate of 141.8 percent over 2017–2024, an OLS trend coefficient of USD 454.86 million per year ($p < 0.001$), and a multiple regression R-squared of 0.983 collectively confirm that the first phase of export-led growth has been executed with exceptional effectiveness.

Yet the qualitative analysis reveals that this quantitative success rests on a strategic foundation that is insufficient for the next phase of ambition. Export composition remains upstream-heavy, with finished garments representing only 22 percent of revenues. The 'Made in Uzbekistan' brand identity lacks the coherence and international recognition required for premium market access. Sustainability certification coverage among small and medium manufacturers falls critically short of EU threshold requirements. These qualitative deficits define the strategic agenda for the next decade.

The three strategies proposed — heritage brand positioning, scalable sustainability certification, and co-branding with established global partners — address these deficits in a mutually reinforcing manner, targeting different market segments and time horizons while sharing a common strategic logic: convert Uzbekistan's genuine competitive assets — extraordinary heritage, natural resource endowments, government commitment,

13 Oqboyev, A.R. (2025). Methodological foundations of implementing international standards in the export activities of business entities (DSc dissertation abstract). Fergana: FerPI; Tolibjon ugli, K.K. (2025). Analysis of export indicators and development trends. *Central Asian Journal of Innovations on Tourism Management and Finance*, 6(4), 1591–1597.

14 Umarkulov, K.M. (2024). Development of light industry enterprises and ways to increase export opportunities. *Engineering and Economics*, 2(5), 44–52; Umarkulov, K. and To'xtasinov, B. (2025). Utilisation level of export potential of small business entities. *Engineering and Economics*, 3(6), 33–41.



and growing manufacturing base — into internationally credible brand equity and market access credentials. Their successful implementation will require coordinated and sustained investment by government, industry associations, and individual firms over a period of years, not months. The opportunity is real and the analytical foundations for action are established; the question is whether the sector can develop the marketing sophistication that realising this opportunity demands.

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