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O‘ZBEKISTON RESPUBLIKASI BOSH PROKURATURASI
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KURASHISH DEPARTAMENT

“RAQAMLI IQTISODIYOT SHAROITIDA IQTISODIY
XAVFSIZLIKNI TA’MINLASH: MUAMMOLAR VA YECHIMLAR

MAVZUSIDAGI RESPUBLIKA ILMIY-AMALIY ANJUMANI TO‘PLAMI

FUQAROLAR PLASTIK KARTALARI KIBRXAVFSIZLIGINI TA’MINLASH
TIZIMINI TAKOMILLASHTIRISH” (MY CARD MOBIL ILOVASI)

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CHANGES IN TEXTILE INDUSTRY OUTPUT AND THE FACTORS INFLUENCING IT

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Abstract. The textile industry occupies a pivotal role in Uzbekistan's export-oriented economic strategy, serving as a major source of employment and foreign exchange earnings. This study examines trends in textile production output and the principal factors shaping its dynamics. Drawing on data from national statistical sources and international organizations, the research investigates the influence of production capacity utilization, capital investment flows, labor productivity, raw material availability, technological innovation, and export market expansion on overall output volumes. The study further evaluates contemporary development trajectories within the sector and formulates evidence-based policy recommendations aimed at sustainably increasing production. The findings are intended to support the operational efficiency of textile enterprises and advance the long-term competitiveness of Uzbekistan's textile sector in global markets.

Keywords: textile industry, production volume, labor productivity, investment, innovation, export, raw material supply, production efficiency, Uzbekistan.

Annotatsiya. To'qimachilik sanoati O'zbekistonning eksportga yo'naltirilgan iqtisodiy strategiyasida muhim o'rin egallab, bandlikni ta'minlash va valyuta tushumlarini shakllantirishning asosiy manbalaridan biri hisoblanadi. Mazkur tadqiqotda to'qimachilik mahsulotlari ishlab chiqarish hajmining o'zgarish tendensiyalari va ularning dinamikasiga ta'sir etuvchi asosiy omillar ko'rib chiqilgan. Milliy statistika manbalari va xalqaro tashkilotlar ma'lumotlari asosida ishlab chiqarish quvvatlaridan foydalanish, investitsiya oqimlari, mehnat unumdorligi, xomashyo bilan ta'minlanganlik, texnologik innovatsiyalar hamda eksport bozorlarining kengayishi umumiy ishlab chiqarish hajmiga qanday ta'sir ko'rsatishi tahlil qilingan. Tadqiqotda, shuningdek, sohaning zamonaviy rivojlanish yo'nalishlari baholanib, ishlab chiqarish hajmini barqaror oshirishga qaratilgan ilmiy asoslangan tavsiyalar ishlab chiqilgan. Olingan natijalar to'qimachilik korxonalarining operatsion samaradorligini oshirish va O'zbekiston to'qimachilik sektorining jahon bozorlaridagi uzoq muddatli raqobatbardoshligini mustahkamlashga xizmat qiladi.

Kalit so'zlar: to'qimachilik sanoati, ishlab chiqarish hajmi, mehnat unumdorligi, investitsiyalar, innovatsiyalar, eksport, xomashyo ta'minoti, ishlab chiqarish samaradorligi, O'zbekiston.

Аннотация. Текстильная промышленность занимает важное место в экспортно ориентированной экономической стратегии Узбекистана, являясь одним из основных источников занятости и валютных поступлений. В данном исследовании рассматриваются тенденции изменения объёмов производства текстильной продукции и основные факторы, влияющие на их динамику. На основе данных национальных статистических источников и международных организаций проанализировано влияние использования производственных мощностей, инвестиционных потоков, производительности труда, обеспеченности сырьём, технологических инноваций и расширения экспортных рынков на общий объём выпуска продукции. В исследовании также оцениваются современные траектории развития отрасли и формулируются научно обоснованные рекомендации, направленные на устойчивое увеличение объёмов производства. Полученные результаты могут способствовать повышению операционной эффективности текстильных предприятий и укреплению долгосрочной конкурентоспособности текстильного сектора Узбекистана на мировых рынках.

Ключевые слова: текстильная промышленность, объём производства, производительность труда, инвестиции, инновации, экспорт, сырьевое обеспечение, эффективность производства, Узбекистан.

INTRODUCTION

The sustainable growth of industrial sectors in the global economy is inextricably linked to the expansion of production volumes and continuous improvements in efficiency. The textile industry represents one of Uzbekistan's most strategically significant sectors, characterized by its high export orientation and substantial contribution to national employment. Over recent years, ongoing modernization processes, the introduction of



new investment projects, and the expansion of production capacities have collectively driven steady growth in textile output.

The evolution of textile production volumes is shaped by a complex interplay of economic, institutional, and technological factors. Investment levels, the adoption of advanced technologies, labor productivity, raw material supply, energy efficiency, and the broadening of export markets each exert a direct influence on production outcomes. When these factors develop favorably, they stimulate output growth; conversely, resource shortfalls or declining market demand can constrain production momentum.

Against this background, the analysis of output trends and their determining factors carries significant scientific and practical importance. This paper aims to identify key drivers of sectoral development, assess existing structural challenges, and propose actionable recommendations for further expanding production capacity.

LITERATURE REVIEW

The relationship between industrial performance and its underlying determinants has been extensively explored in the economic literature. Porter (1985, 1990) established foundational frameworks for analyzing competitive advantage and national industrial competitiveness, emphasizing the role of innovation and factor conditions in driving sectoral productivity. These theoretical insights remain highly applicable to the study of Uzbekistan’s textile sector as it integrates into global value chains.

More recent empirical work has deepened understanding of the role of labor productivity and manufacturing integration. Antosz et al. (2022) demonstrated that Overall Labor Effectiveness (OLE) metrics provide a robust basis for diagnosing inefficiencies in human-centered manufacturing environments. Similarly, Sun, Zhang, and Wang (2024) identified that deeper integration between manufacturing and services significantly improves resource allocation and labor productivity, a finding with direct implications for the organizational structure of Uzbek textile clusters.

At the national level, Axmadovich et al. (2024) assessed the economic potential and efficiency of textile clusters formed within Uzbekistan, while Xakimov and Berdiev (2023) developed territorial agglomeration indices for the textile industry, providing methodological tools for evaluating regional concentration effects. Tursunov, Krivyakin, and Xakimov (2018) further contributed a methodology for assessing the competitiveness of textile enterprise products. These studies collectively form a solid empirical foundation for the current research.

KEY FACTORS INFLUENCING TEXTILE OUTPUT

Labor Productivity

Labor productivity constitutes one of the most significant determinants of textile output levels. Higher productivity translates directly into greater output per worker, reduces unit production costs, and strengthens enterprise profitability. Accordingly, the implementation of modern technologies, investment in workforce skills development, and the automation of production processes represent the primary pathways to productivity enhancement. Evidence from the ILO (2023) confirms that manufacturing sectors with sustained productivity growth demonstrate superior resilience to external demand shocks.

Investment Flows

Investment volumes — both domestic and foreign — exert a considerable influence on the growth of textile production. Capital inflows enable enterprises to create new production capacities, modernize technological equipment, and diversify product portfolios. The resulting expansion of output reinforces the competitiveness of enterprises in both domestic and international markets. Uzbekistan’s government has actively pursued foreign direct investment attraction through a series of presidential decrees and incentive frameworks spanning 2019 to 2025, which have contributed significantly to the sector’s capital base expansion.

Raw Material Supply and Cotton-Textile Clusters

Uzbekistan’s cotton-textile clusters have played a transformative role in deepening the domestic processing of raw materials and increasing the share of finished goods in total output. As the degree of vertical integration has risen, so too has the sector’s capacity to generate added value domestically rather than exporting unprocessed cotton. However, the intensification of international competition simultaneously demands higher product quality, cost optimization, and broader adoption of innovative manufacturing techniques.



Innovation and Technological Advancement

The adoption of innovative technologies acts as a systemic multiplier of production efficiency. Digital production management systems, energy-efficient equipment, and precision manufacturing processes collectively reduce waste, shorten production cycles, and improve product consistency. UNIDO (2024) data indicate that technology-intensive textile producers in emerging economies have achieved substantially higher export growth rates compared to traditional manufacturers, highlighting the strategic importance of innovation investment.

Export Market Expansion

Access to and diversification of export markets serve as both a driver and an indicator of productive capacity growth. As Uzbekistan's textile sector has expanded its geographic export footprint — with growing shipments to European Union markets, Russia, China, and Turkey — production volumes have followed an upward trajectory. The World Bank (2024) notes that export diversification reduces sector vulnerability to single-market demand fluctuations and incentivizes enterprises to meet higher international quality standards.

Discussion and Policy Implications

The foregoing analysis reveals that no single factor independently determines the trajectory of textile production volumes. Rather, output dynamics emerge from the simultaneous interaction of investment levels, labor market conditions, technological readiness, raw material availability, and export performance. Policy frameworks that address only one dimension of this multifactorial system are therefore likely to produce suboptimal outcomes.

On the basis of this analysis, three principal policy directions merit prioritization. First, the deepening of public-private partnerships in vocational training and skills upgrading programs should be pursued to sustain labor productivity gains. Second, incentive structures for research and development investment within textile enterprises warrant strengthening, particularly in areas of sustainable manufacturing and digital transformation. Third, targeted diplomatic and trade facilitation efforts to secure preferential market access agreements would amplify the export-driven growth dynamic already observable in the sector.

Conclusion and Suggestions

This study has examined the key factors driving changes in Uzbekistan's textile industry output, encompassing labor productivity, investment, raw material processing depth, technological innovation, and export market development. The findings confirm that sustained output growth requires a coordinated, multidimensional policy approach rather than isolated interventions. The development of cotton-textile clusters, continued attraction of foreign investment, and the prioritization of innovation together constitute the most effective pathway toward a globally competitive textile sector.

The results of this research carry both academic and practical significance, offering an analytical basis for enterprise management decisions and informing state industrial policy in the textile sector. Future research should extend this framework through econometric modeling of output determinants and firm-level case study analysis to provide more granular actionable insights.

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