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THE TRENDS OF DEVELOPMENT OF THE GARMENT, KNITTING AND TEXTILE INDUSTRY IN UZBEKISTAN

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Abstract

The current article focuses on the studies of trends of the development of garment, knitting and textile industry in Uzbekistan. Meanwhile, the article studies a variety of scholar literature studied by local scholar the field of garment, knitting and textile industry overview and development within Uzbekistan. At the same time, the article suggests some of key tips that should be used by local garment, knitting and textile enterprises to remain competitive in the market by drawing attention to digital technology processes.

Key words: garment, knitting industry, textile, apparel, market analysis

ЎЗБЕКИСТОНДА ТИКУВ-ТРИКОТАЖ ВА ТЎҚИМАЧИЛИК ТАРМОҒИНИНИНГ РИВОЖЛАНИШ ТЕНДЕНЦИЯЛАРИ

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Аннотация

Ушбу мақолада Ўзбекистондаги тикув-трикотаж ва тўқимачилик саноатининг ривожланиш тенденциялари кўриб чиқилади. Шунингдек, унда маҳаллий олимлар томонидан Ўзбекистондаги тикувчилик, трикотаж ва тўқимачилик саноатининг шарҳи ва ривожланиши бўйича кўриб чиқилган турли илмий адабиётлар таҳлил қилинади. Шу билан бирга, мақолада рақамли технологиялар жараёнларига эътибор қаратиш орқали маҳаллий тикувчилик, трикотаж ва тўқимачилик корхоналари бозорда рақобатбардош бўлиб қолишлари учун фойдаланиши керак бўлган баъзи асосий тавсиялар келтирилган.

Калит сўзлар: кийим-кечак, трикотаж саноати, тўқимачилик, кийим-кечак, бозор таҳлили

ТЕНДЕНЦИИ РАЗВИТИЯ ШВЕЙНО-ТРИКОТАЖНОЙ И ТЕКСТИЛЬНОЙ ОТРАСЛИ В УЗБЕКИСТАНЕ

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Аннотация

Данная статья посвящена изучению тенденций развития швейно- трикотажной и текстильной индустрии в Узбекистане. Одновременно в статье анализируется разнообразная научная литература, изучаемая местными учеными, по вопросам обзора и развития швейно- трикотажной и текстильной промышленности в Узбекистане. В то же время, в статье предлагаются ключевые рекомендации, которыми местные предприятия швейно-трикотажной и текстильной промышленности должны воспользоваться для сохранения конкурентоспособности на рынке, уделяя особое внимание цифровым технологиям.

Ключевые слова: швейная промышленность, трикотажная промышленность, текстиль, одежда, анализ рынка

Introduction

The demand for essential products in society stands as a crucial concern for any nation, laying the groundwork for assessing the population's overall well-being. Consequently, ready-to-wear apparel necessitates a tailored approach to the development issues specific to each nation. In Uzbekistan, clothing ranks as the most favored consumer good, representing quite good indicator of household spending, and the evolution of the current market warrants deeper scrutinizing of its essential aspects. The textile industry constitutes one of the most advanced sectors in Uzbekistan, presenting a distinctive marketing setting for global industry development. At the same time, advancing the garment sector can fulfill the community's needs for consumer products as well as enhance living conditions and cultural standards, serving as a pivotal element in boosting the economy of the country. Within the industrial world, much like in other developed countries, the garment, knitting and textile sectors and the area of fashion emerges as a significant contributor to Uzbekistan's further development, representing a major industry in scale. Given the current dynamics, exploring the apparel market and establishing effective development strategies are of paramount importance. Moreover, in the current digital era, the role of digital marketing technologies, metaverse, CAD/CAM, 3D textile printing, artificial intelligence, virtual reality and augmented reality are considered as being quite critical and play key role in garment, knitting, textile, fashion, apparel enterprises development processes.

Literature review

In today's dynamically and ever changing world the future advancement of the textile and apparel sector in developing nations must fundamentally hinge on the flexibility of scientific inquiry and the significance of the educational environment, in tandem with their collaboration with manufacturing and government administration. Moreover, it is essential to facilitate the effective acquisition of new knowledge and competencies, as well as the generation and economically productive utilization of innovations, alongside the propagation and application of new technologies and technical advancements. Furthermore, this encompasses the alignment of production technologies and adaptable

manufacturing, alongside the coexistence of traditional industries and newly established digitally transformed sectors, preserving jobs and cultivating sustainable values, with a primary focus on information and communication technologies (ICT), a cluster-oriented approach, original design, and thorough planning, while also shifting towards technical textiles and market differentiation. Indeed, the view for the small and medium enterprises (SMEs) in the textile and apparel industry can be envisioned as a close, adaptable integration of novel designs, production methods, strategic planning, and manufacturing, with an inclination towards leveraging new types of raw and reproductive materials, as well as the capacity for rapid responses (Just In Time and Quick Response Systems) to market demands, inherently suggesting the effective adoption and incorporation of contemporary technologies in manufacturing processes, alongside investments in innovative practices and human capital. Ultimately, it is crucial to highlight that among the fundamental elements for the effective operation and performance of SMEs within the textile and apparel sector of developing nations, which form the foundation for establishing globally responsive, thriving, and intensely competitive enterprises, the following can be noted: the coexistence of traditional and digital domains, a high degree of automation in application, the dissemination and application of innovative production technologies featuring a significant degree of automation and flexible organizational innovations, careful appraisal of both quantitative and qualitative dimensions of human resources, the necessity for sourcing and integrating new materials, intelligent specialization, adaptable organizational innovations, an increase in the use of technical textiles, the coherence of clustering strategies, and integration into the global marketplace Dimitrijević, 2024 [1].

The textile and clothing (fashion) sector holds substantial social, cultural, and economic importance in numerous communities. However, the term fashion encompasses various interpretations, from styles of execution to textiles and garments. Among other findings, Hansen’s (Aaronson, 2020 as cited in Akhtar et al., 2022) research revealed that fashion signifies discourses that reflect advancements in arts, societal organization, and culture. In Western culture, it is closely linked “style”, “dress”, or “clothes” (Adejeest, 2022; Amazon, 2017, as cited in Akhtar et al., 2022). These characteristics render fashion a significant concept; thus, in this study, the fashion industry pertains to textiles and apparel driven by fashion, in addition to other products related to fashion Akhtar et al., 2022 [2]. Currently, the light industry which encompasses textile, garment, leather, and footwear sectors constitutes 15.8 percent of overall industrial production, 13 percent of fixed assets, and over 13 percent of the workforce. Additionally, a robust supply of raw materials (cotton, wool, astrakhan, silk, oil, gas, etc.) is essential for advancing all segments of light industry, alongside favorable conditions for the swift progression of the economy (natural-climatic factors, regional advantages, and labor resources). Regarding growth statistics for industrial output in this sector, in 1991, only 7 percent of the cotton fiber cultivated domestically was processed, whereas today, light industry enterprises handle 40 percent of this product. By the year 2030, the goal is to achieve processing of 100 percent of the raw cotton produced in the country, with an anticipated production increase of 5.6 times accordingly Sultanova, 2023 [3]. In today’s global environment of material production, there is a significant focus on creating manufacturing hubs in locales where the essential resources are abundantly accessible and conveniently supplied to consumers, along with the necessary infrastructure. Uzbekistan, a key player in the national economic framework, especially within the textile

sector, is progressing by leveraging competitive advantages informed by economic growth theories. The advancement and expansion of our nation's textile industry is influenced by a mix of socio-economic, natural, climatic, geographical, and historical elements Sultanova, 2023 [4]. Businesses within the apparel sector encounter a variety of financial obstacles stemming from rising production expenses, global rivalry, technological advancement, and fluctuations in international supply chains. In these circumstances, enhancing economic performance emerges as a critical focus for ongoing industrial progress. Economic performance in garment manufacturing firms is influenced not just by profit metrics but also by workforce productivity, resource efficiency, production standards, innovation potential, and management efficacy. As reported by official sources textile exports reached 2.5 billion US dollars in 2025 (Agency of Statistics under the President of the Republic of Uzbekistan, 2025 as cited in Axmedova, 2026) These developments emphasize the escalating significance of technological upgrades and innovation-driven management in facilitating sustainable industrial advancement Axmedova, 2026 [5].

Methods

The research methodology utilized in current paper can be categorized as the utilization of secondary data viewed as primary sources, published materials from diverse academic literature, combined with an inductive approach to illustrate a spectrum of data analyzed in this article. Furthermore, the research employs a systematic and comparative analytical framework, integrating quantitative techniques to conduct and provide statistical analysis of garment, knitting, wearing, apparel and textile manufacturing field in Uzbekistan.

Furthermore, the research is grounded in official documents, and global studies, applying synthesis and logical reasoning to explore the value chain of fashion, garment, fiber groups and apparel field.

Analysis

At present, the textile, garment, knitting sector of Uzbekistan stands as one of the foremost and rapidly evolving industries. As reported by the National Statistics Committee of the Republic of Uzbekistan, in 2018, the current sector represented 10.8 percent of the country's total industrial output, contributing approximately 4% to the GDP, and accounting for over 44 percent in the production of non-food consumer items as well as 10 percent of exports. In recent years, the annual growth rate of industry production has soared around 18 percent. In terms of the contribution of textile products to the overall industrial output, it exceeded 10 percent while the share of textile products in the manufacturing sector has averaged 16.6 percent over the last years. At the same time, the manufacturing of textiles as shown in Figure 1 comprised 16763 bln.soums in 2017 after two years it significantly increased to the level of 29946,6 bln.soums and in 2022 it reached the point of 62850,7 bln.soums by indicating huge shift and two years later in 2024 it demonstrated absolute plunge by reaching to the point of 89489bln.soums accordingly. Likewise, the current sector of textile production field the area of manufacturing of wearing apparel had demonstrated similar tendencies. In particular, if manufacturing of wearing apparel comprised only 6108,2 bln.soums and after two years in 2019 it reached the point of 9165,8 bln.soums showing a good increment. On the other hand, in 2021 it has shown a slight increase the level of 13592,8 bln.soums. However, the current indicator almost doubled by illustrating 23087,8 bln.soums in 2022 and reached to the level of 31906,8 bln.soums in 2024 which has shown a quite substantial increment in the current segment due to implementation of new and digital

technologies including digital marketing technologies as well as the export of textile products has shown an increase in recent years which is also due to implementation of digital technologies and gaining a quite critical comprehension by manufacture enterprises of garment, knitting, textile products and drawing attention to fast fashion area and taking further actions to remain competitive in local markets of Uzbekistan and being able to broaden export potential to overseas countries..

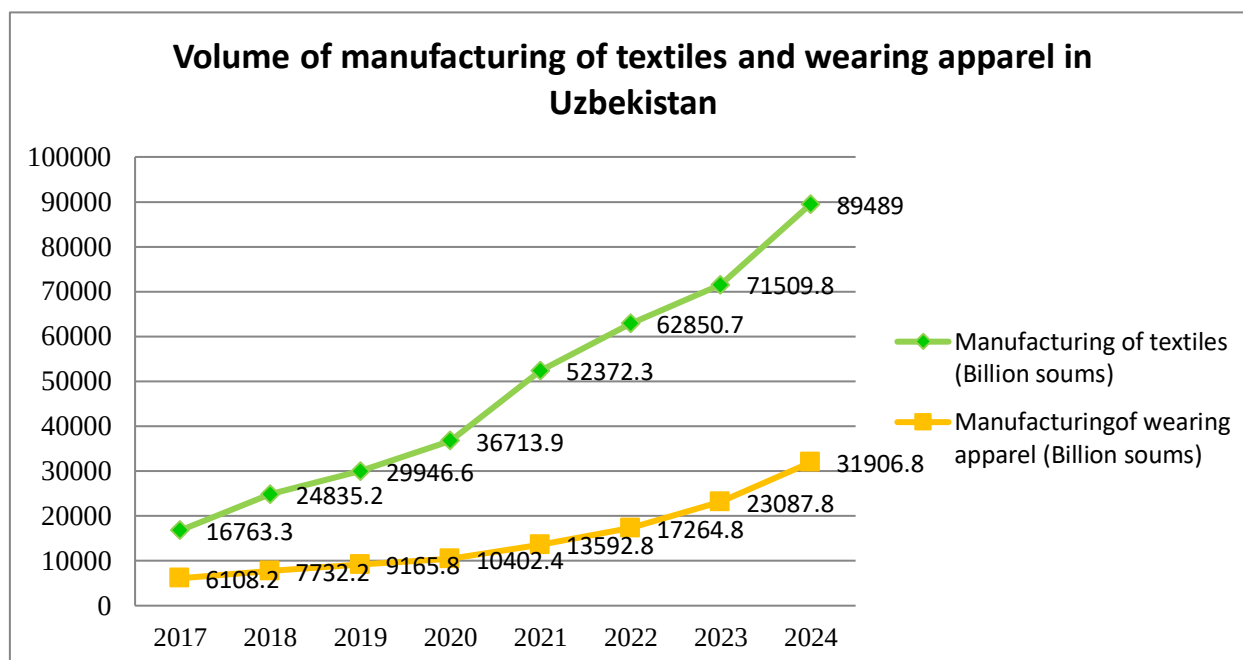


Figure 1. Source: National Statistics Committee of the Republic of Uzbekistan. (2026). Volume of industrial production by type of economic activity (annual). [6].

Discussion

The modern fashion sector revolves around social and cultural phenomena commonly known as the 'fashion system.' The current influential as shown in Figure 2 entity integrates art, design, production, branding, and retail. For instance, art and design play crucial roles in shaping societal fashion trends (Hansen, 2004, Hardt, 2021 as cited in Akhtar et al., 2022). Recently, the fashion sector has undergone a significant transformation from traditional retailer-centric manufacturing to contemporary (fast fashion) consumer-oriented production (Hartmans, 2017 as cited in Akhtar et al., 2022). Meanwhile, the current industry is widely recognized for its erratic demand-supply dynamics, extended production timelines, brief fashion cycles, selection of raw materials, seasonal requirements, and diversity (Hautala, 2021; Huang, and Rust, 2021, as cited in Akhtar et al., 2022). The current fashion value chain has evolved from forecast-driven mass production to seasonally-based assortments. Garment, knitting, apparel retailers are now able to accept and fulfill orders much more quickly.

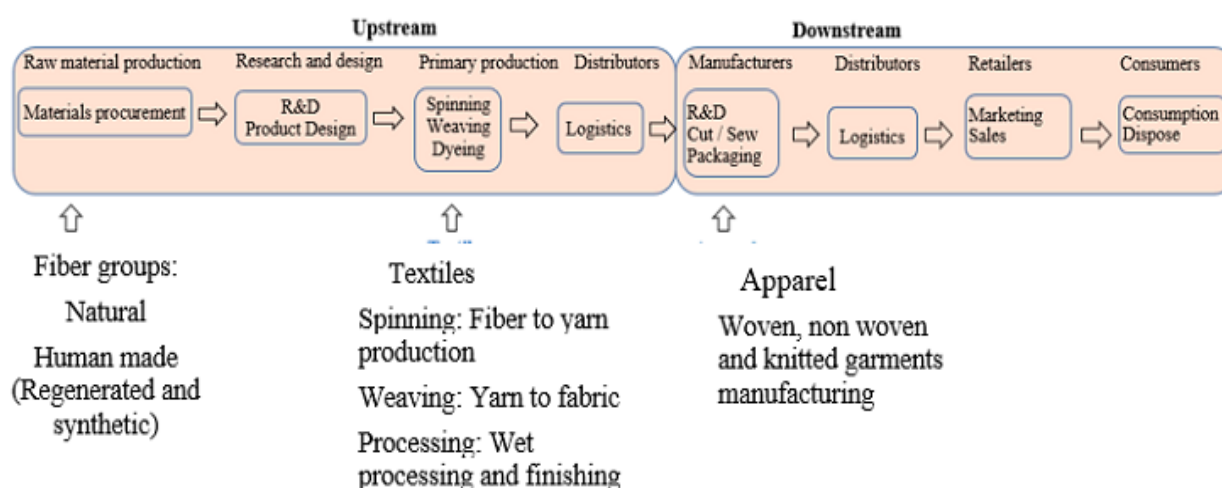


Figure 2. Source: Akhtar et al., 2022 Value chain structure of the fashion industry 2022 [7].

Furthermore, alongside the recent initiatives aimed at eliminating trade barriers, the fashion sector is advancing towards digital innovations such as real-time supply chain visibility, supply chain optimization, on-demand cloud manufacturing, inventory optimization, and synchronization with demand forecasting as shown in Figure 2. The most prevalent type of digital platform is the digital marketplace, and the highly personalized services offered by e-commerce platforms transcend geographic limitations among stakeholders in the value chain (Huber, 2019, as cited in Akhtar et al., 2022). Thus, given the economic advantages for both developed and developing countries, various obstacles including shorter life cycles, tariff constraints, market speed, and seasonality have hindered the balanced evolution of the industry. Thereby, by the suggested model the garment, knitting and textile industry in Uzbekistan can benefit in the long run. As in recent years, Uzbekistan's garment, knitting, and textile sector has undergone remarkable expansion and evolution, fueled by strategic investments, modernization initiatives, and a strong emphasis on export capabilities. Notable trends include the incorporation of cutting-edge technologies, growth of manufacturing capacities, and increased engagement in international supply chains, all of which work together to boost the industry's competitiveness and sustainability.

Conclusion & recommendations

These advancements show Uzbekistan's dedication to diversifying its economy and capitalizing on its rich raw material resources, especially cotton, to establish a thriving garment, knitting, textile, fashion industry. The implementation of the appropriate marketing, as well as digital marketing strategies with industry requirements can foster a favorable environment for innovation, enhancement of quality, and development of workforce skills, ensuring the sector meets both local needs and global standards. Looking forward, the industry is set to maintain its positive drive by embracing digital innovations, implementing eco-friendly practices, and strengthening export partnerships. Moreover, the current ongoing progress not only offers economic advantages but also positions Uzbekistan as a pivotal player in the global garment, apparel, textile arena, ready to influence the shifting trends in fashion and manufacturing across the globe.

As for recommendations directed for the development of garment, knitting, textile, apparel enterprises as well as fashion sector can be provided as key trends encompass the implementation of cutting-edge technologies such as automated knitting machinery and digital textile printing, which enhance efficiency and product variety. There is an increasing emphasis on sustainable and environmentally-friendly manufacturing methods, with numerous companies investing in organic cotton and minimizing ecological impact. Furthermore, the sector is transitioning towards higher value-added offerings, including fashionable apparel and technical textiles, to satisfy both local and global market requirements. In addition, digital marketing technologies involving for the use of social media marketing, augmented reality, virtual reality, 3D dimensional technologies, affiliate marketing, search engine optimization should be implemented within enterprises.

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