

**ANALYSIS OF THE EFFECTIVENESS OF THE TEXTILE INDUSTRY****Yuldashev Samad Normuminovich, Azimova Feruza Payziyevna and****Akbarxujayeva Nilufar Azimdjanovna**

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**ABSTARCT**

The article discusses all aspects of the textile industry and analyzes all the stages of development in this area. Since independence, the Uzbek government has focused on developing various sectors of its industry, including the textile industry, which accounts for a fifth of GDP and employs a third of all industrial workers. The textile industry can provide the domestic market with the necessary products, as well as increase exports. The country has many years of experience in textile manufacturing, has a comprehensive technical base, as well as an adequate supply of resources and labor, a reliable education and training network, targeted government policies and targeted investment strategies.

**Keywords:** Textile industry, GDP, investment.

**Introduction**

The textile industry- is a light industry that produces various fabrics, yarns and other products from various plant fibers, wool and synthetic fibers.

The textile industry includes the primary processing of textile raw materials, yarn, flax, hemp, jute fiber, silk, wool, nonwovens, net weaving, textiles, knitwear, and felt printing. The products of the textile industry are used in the manufacture of clothing and footwear, as well as in the furniture, engineering and other industries. The textile industry of Uzbekistan is the leading branch of the light industry.

The production of textiles originated in ancient times. Cotton planting, hand spinning and weaving were known in India, China, Egypt and Central Asia centuries ago. The textile industry was the first to switch to mechanized production. The industrial revolution in Europe in the second half of the 18<sup>th</sup> century began with this industry.

The textile industry in Uzbekistan has a long history. Products such as *satın*, *bekasam*, *velvet*, *banors*, *zandanach* and *olacha*, made by local craftsmen in the Middle Ages, were popular in distant countries and were exported to Europe and the Middle East along the Great Silk Road. But the creation of a production base by combining small disparate crafts and fabric production began only in Soviet times, in the 1920<sup>s</sup>.

In the 90<sup>s</sup>, the textile industry of the Republic of Uzbekistan entered a new stage of qualitative changes. Cooperation of the republic with foreign countries is expanding,

the number of joint ventures with foreign partners is increasing.

One of the main directions of development of the textile industry in Uzbekistan is not the export of cotton fiber to the world market, but a strategy to increase the production of competitive cotton fabrics in the world market. As of 2019, there were previously \$ 1-billion worth of cotton fiber exports annually. If this fiber is 100% deeply processed in our country, it will be possible to produce textiles worth about \$ 5 billion, export at least \$ 2-billion, or twice as much as the export of fiber. If finished products are manufactured under world famous brands, the added value will increase by 10-15 times, not 5 times.

For this, new joint ventures were created with companies from the USA, Italy, Turkey, Pakistan, India, the Republic of Korea and other countries for the production of cotton fabrics. The equipping of enterprises with advanced foreign textile machinery has begun. In 1993-94. Equipment from Switzerland and Germany was installed at JSC *Bukhorotex*. In 1994, in cooperation with the Turkish corporation *Yazeks*, a full-cycle textile complex was launched in the *Ellikkalare* region of the Republic of Karakalpakstan.

From 1995 to 2003, foreign investment in the textile industry of Uzbekistan amounted to more than 519.89 million US dollars, including [This article is one of the selected articles of the Republic of Korea | South Korea], an investment of 186 million *Kabul Textiles*, Turkey. *Timi*, *Tipash* 75 million (*Kosonsoy-Tikmen* in Namangan, yarn for suits and coats, woolen sheets and handmade carpets), *Bursel*

52.9 million (Chinese textile mill), *Astop* 40.3 million ("*Asnamtextil*"), Japan firm "Marubeni" 60 million ("*Silk Road*", Namangan). The volume of export-oriented products in the textile industry of Uzbekistan is growing. In 2003, the textile industry of Uzbekistan produced 453.3 million fabrics, including 415.2 million yarns, 167 million pairs of socks and 28.6 million knitwear.

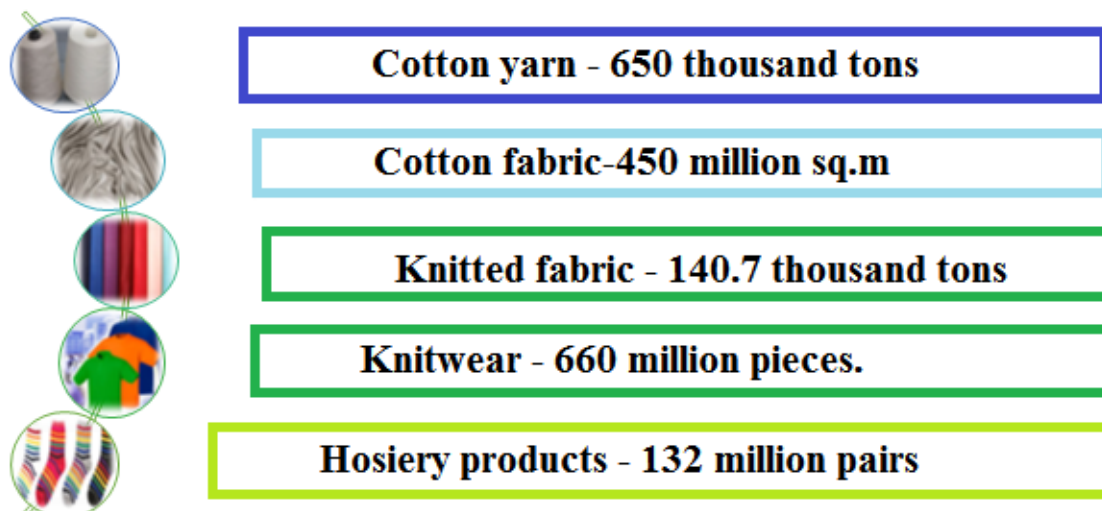
Abroad, the textile industry is especially developed in India, China, USA, Japan, Great Britain, France, Italy, Germany, Egypt. In the textile industry of developed countries, the first place is occupied by the production of cotton yarn, followed by the production of woolen and silk fabrics.

Uzbekistan, the sixth largest cotton producer, was the third largest cotton exporter. However, in recent years, raw cotton exports have been declining, with an emphasis on high value added products. As a strategic sector of the economy of Uzbekistan, light industry provides a high level of employment, contributes to the strengthening of the economic and industrial potential and the international prestige of our country. The unique geopolitical position of Uzbekistan allows direct economic dialogue with many countries, mutually beneficial

cooperation with the countries of Europe and Asia. The light industry is developing from year to year. The introduction of new production technologies, the use of high-performance modern equipment and, at the same time, effective management will ensure high labor productivity in industrial enterprises, and the growth of industrial production. The republic, which has exported only cotton fiber for many years, today has unlimited opportunities to occupy a leading position in the world textile market not only as a supplier of cotton fiber, but also as an exporter of textiles, especially finished products.

The light industry of Uzbekistan is one of the leading and fastest growing industries. According to the State Statistics Committee, in 2017 the industry's share in the total industrial volume of the country was about 30%, its share in GDP was about 4%, and in the production of delicacies - more than 44%. In recent years, the annual growth in production has been about 18%, and exports - 10%.

Uzbekistan is one of the largest producers of natural textile fibers, yarns and knitwear in the world. There are more than 7000 textile enterprises in the country with an annual output, their capacity is:



**Picture-1.** Annual production of natural fibers, yarns and knitwear in Uzbekistan

By the Decree of the President of the Republic of Uzbekistan No. PF-5282 dated December 14, 2017, the completion of the construction of Uzbecyengilsanoat JSC and the creation of the Uztextile Industry Association are provided. These reforms, well-chosen strategy and competent leadership of the Association of the

Textile Industry allowed the textile enterprises of our country to demonstrate positive growth dynamics. Today the Association unites more than 1400 manufacturers of the textile market of Uzbekistan. A significant part of light industry products, in particular, processing of

cotton fiber 706 thousand tons and 510 million tons. sq. meters of fabrics, including:

- Knitwear - 89 enterprises;
- Finished textile products - 495 enterprises;
- Sewing products - 354 enterprises;
- Socks - 54 enterprises;
- Textile haberdashery - 20 enterprises.

156-textile enterprises were established with the participation of government investors from South Korea, India, Singapore, Germany, Switzerland, Italy, Japan and the United States. The enterprises of the Association also produce a wide range of products, including medical products, nonwovens, cotton products, overalls and other goods, while developing new generation products - new innovative products and ensuring their implementation. In the textile sector, the highest value added in the cotton chain is found in finished knitwear and apparel. Given the importance of the textile industry in the economic development of the

country, Uzbekistan is implementing the Program of Measures for the Further Development of the Textile and Garment Industry for 2017-2019. According to the program, by 2020 it is planned to increase the production of yarn 2.5 times, finished fabrics - 2.8 times, nonwovens - 1.5 times, knitwear - 2.7 times. It is planned to increase the production of garments by 3.2 times, knitwear by 2.1 times, and silk by 2.1 times. The production of fabrics in 2011 amounted to \$ 85.63 million. sq. meters, and by 2020 this figure will reach 459.2 million. square meters and ensures the growth of production by 5.4 times. In 2017, about \$ 1.2 billion. US dollar textiles were exported. At the same time, during the crisis, prices for the main types of raw materials and textiles fell. The main exporters of textile products are Russia (36.8%), Turkey (18.8%), China (16.2%), EU countries (15.3%), South Korea (5%).

The nomenclature of textile export is as follows:	
Yarn	67.2%;
Textile yarn	7.3%;
Knitted yarn	6.2%;
Ready-made knitwear	17.4%;
Othertextiles	6.4%.

**Table-1.** Distribution of types of export textiles in percent.

The share of cotton fiber processing by domestic consumers in the country has reached 50% of production. Modern textile enterprises have been created, including dyeing, processing, weaving and sewing. Due to the low level of processing of raw materials, export of textiles from Uzbekistan is insignificant. In 2016, the volume of textile exports amounted to \$ 1 billion. USD 146.5 million and China received USD 104.6 billion. USD, Turkey - 10.9 billion USD, India - 16.2 billion dollars, Bangladesh - 1.76 billion dollars, Pakistan - 7.68 billion textiles worth dollars. In 2012-2016, the growth of exports of the textile industry (excluding cotton fiber) amounted to 132.5%. In 2016, the share of exports in the total volume of commercial products amounted to 40%. As a result, although the share of Uzbekistan in the world market of raw cotton is 3.6%, its share in the world production of fabrics and textiles, finished knitwear and garments is slightly lower. In order to stimulate and increase the

production of export-oriented products, an integrated system of tax incentives and preferences for exporting enterprises has been created in the country. For example, with the exception of certain types of excisable goods established by the Cabinet of Ministers of the Republic of Uzbekistan, they are not subject to excise tax when selling excisable goods exported by their manufacturers.

Considering that the textile industry is one of the priority areas of economic development, the state pays increased attention to it and provides manufacturers with all kinds of support. In recent years, especially in 2020, when enterprises were in dire need of effective support, the government provided textile and clothing manufacturers with various tax, customs, credit benefits and preferences. For example, in 2017-2020, enterprises were provided with concessional loans for a total of \$ 365 million.

According to the decree of the President "On the Program of Measures for the Further

Development of the Textile and Garment and Knitwear Industry for 2017-2019", adopted on December 21, 2016, enterprises specializing in the production of non-food consumer goods in the textile and garment and knitwear industry (fabrics, ready-made garments, clothing, hats, hosiery, textile haberdashery, accessories and accessories for the garment and knitwear industry), provided tax and customs benefits, preferences in the form of exemption from income tax, property, from a single tax payment for microfirms and small enterprises, customs payments for imported equipment, component parts, raw materials and materials not produced in the republic, and others.

A year later, by the Presidential Decree "On measures for the accelerated development of the textile and garment and knitwear industry" dated December 14, 2017, textile enterprises were additionally exempted from paying customs duties (customs clearance fees) for imported cotton, artificial and synthetic fiber, wool, raw materials and other materials necessary for production and not produced in the republic.

Exemption from the payment of customs privileges when importing industrial goods and equipment is due to the expediency of reducing the costs of domestic producers, which is quite logical. If the goods necessary for production are not produced in the country and the manufacturer will import them in any case, then it makes no sense to increase its costs and thereby reduce the competitiveness of products in the domestic and foreign markets. At present, sufficient capacities for processing cotton fiber have been created, and at the same time a mechanism is being introduced to restrain the export of cotton yarn.

The presidential decree "On measures to further develop the light industry and stimulate the production of finished products" dated September 16, 2019, requires the introduction of a fee for each kilogram of exported yarn for \$ 0.01 from 2021. 75 percent of these funds will be directed to the Uztekstilprom Association to finance the introduction of international standards at enterprises, product certification, cover the costs of enterprises for participation in international exhibitions and fairs, create and promote national brands, implement research and innovation projects,

training, retraining and professional development of personnel and other measures. It is expected that due to an increase in yarn processing volumes within the republic, as well as the imposed export tax, the share of yarn exported will decrease from the current 59 to 48 percent in 2021. At the same time, an increase in the output of these products is predicted.

In addition, in February 2019, serious support measures were introduced in the form of concessional lending and coverage of interest payments on loans for exporting enterprises of textile and garment-knitted products. In September of the same year, an exemption from property tax until 2023 was granted to enterprises that have a share of finished garment and knitwear exports in the total revenue of at least 60 percent.

Based on this, the main tasks in the field of regulation of the textile industry were to create favorable conditions for the effective functioning of textile and clothing enterprises, as well as to change the previous practice of economic relations between participants in the value chain from suppliers of raw materials - agricultural producers to manufacturers of final products and exporters through the introduction of market mechanisms ... This should help reduce costs and increase the competitiveness of domestic textile and clothing manufacturers. Uzbekistan is the sixth largest cotton producer in the world with an average annual harvest of three million tons, which suggests that there are comparative advantages for the formation of a large textile and garment manufacturing sector.

However, the resource base should be developed and the efficiency of its use should be increased. There was a need to move from an extensive to an intensive increase in the production of raw materials. With regard to cotton, this primarily concerns an increase in its yield, which in Uzbekistan's conditions must be achieved without increasing the area for cultivation, ensuring the optimization of the use of water resources. The solution to this problem was based on reforms in agriculture and a fundamental change in the relationship between farmers-suppliers of cotton and manufacturers of textiles and clothing.

Since 2017, a system of ordering and advancing the production of raw cotton directly from farms by domestic enterprises of *Uztekstilprom* has been introduced as an experiment, on the condition that the purchased raw cotton is used by them exclusively for further processing.

One of the main reforms of the period under review in the field of regulation of inter-farm relations between agricultural producers and processing enterprises was the introduction of a cluster form of management, which allows creating a single production chain from raw materials to finished products, while significantly reducing transaction costs for both farmers and producers.

Over the years, the cluster model has shown its effectiveness relative to the previous model of relationships between farmers, ginners and cotton producers. As a result, since the testing of the cluster model and the creation of the first cotton-textile cluster in 2017, over the next three years, their number has grown sharply and reached 97 in 2020. In 2020, more than 90 percent of the country's total cotton crop was harvested in clusters. The yield in clusters has increased by 6.2 centners over the past four years. At the end of 2020, except for seven clusters, all the rest have already established the production of higher value added products: 83 - they produce yarn, 46 - fabrics, hosiery, 40 - ready-made garment and knitwear.

Thus, the transition to a cluster model in a short period of time provided a radical change in the production chains in this area from raw materials to finished products on a national scale, which has already formed a new environment for relations between manufacturers of different cycles of the production process and leads to an increase in production efficiency and an increase in the competitiveness of domestic products.

Today, there is an accelerated dynamics of growth in the production of textiles and clothing: in four years, it increased in nominal terms by 2.8 times. In volume terms, the production of cotton fiber increased by 17 percent, yarn - 2.1 times, fabrics - 2.9, knitted fabric - 3.2, hosiery - 7.1, sewing - 5.6, knitted - 3.5 times. The share of the textile industry in the total industrial production of the

country increased from 7.5 percent in 2016 to 12.4 percent in 2020, which indicates its outstripping development relative to other sectors of the economy.

Serious structural changes have also taken place in the production of textiles and clothing: a shift away from the sale of primary products at low levels of conversions and a shift towards increasing production and sales of finished products at high levels of conversions. If in 2016 the revenue from the sale of yarn accounted for 52 percent of the total revenue of the industry, then in 2020 it was already 38, despite the fact that the production of yarn in these years continued to increase, and the volume of revenue from its sale doubled. At the same time, the share of products from the 4- redistribution in the total revenue of the industry increased from 32 percent in 2016 to 42 % in 2020. The share of products of the 3-level of redistribution similarly increased from 16.5 to 19.4 percent. All this suggests that the industry is rapidly moving away from the production of more raw materials and semi-finished products and reorienting to the production of products intended for the end consumer.

The period of a pandemic has become an objective indicator of the success of the industry. Large-scale restrictions in the country and in foreign markets created difficulties for the normal operation of textile and garment enterprises, however, the accumulated safety margin in previous years made it possible to prevent a large-scale decline in production and exports, layoffs of workers, as was observed in many countries - large producers of textiles and clothing. Moreover, the industry continued to develop dynamically in 2020, and at a faster pace than in 2019. So, for example, the production of knitwear more than doubled over the year, garments and fabrics by almost 50 percent, hosiery - by 53. All this testifies to the industry's resistance to shocks. In addition, it should be noted that the coronavirus pandemic, on the one hand, has led to a decline in demand for clothing and at the same time has sharply increased the demand for all kinds of protective textiles such as masks, overalls. The increased demand from the healthcare side for textile products compensated for the decline in demand for other goods, creating new

opportunities for the development of the industry.

Also, in the period 2017-2020, the accelerated development of the industry required the commissioning of new capacities, mastering the production of new products, both final and industrial, which in turn required the attraction of serious investments. The fundamental factor in this is the creation of favorable conditions for business development, stimulation of entrepreneurial activity and an inflow of investments. Over the past period, significant changes have been made to investment legislation in the country, free economic zones (FEZ) and inventories of inventories with preferential taxation regimes have been created, protection of investment activities has increased. All this made it possible to significantly increase the inflow of investments into the country's economy, including the textile industry.

According to the *Uztekstilprom* Association, the volume of investments made by the industry annually increased from \$ 190 million in 2016 to \$ 473.9 million in 2019. The favorable climate being formed is already attracting the interest of world brands to launch their production facilities in Uzbekistan.

Another important activity is the implementation of international standards in production, which improves the quality of products and allows them to supply them to more capacious foreign markets, where high quality requirements are imposed. Thus, according to the *Uztekstilprom* Association, as of November 2020, more than 1000 domestic enterprises have implemented international quality management systems ISO-9001 and energy efficiency ISO-50001. More than 400 companies have established production according to the *OEKO-Tex Standard*, at least 20 companies operate in accordance with the international business social responsibility initiative BSCI and *Sedex*. At the same time, the highest attention of the country's top leadership is paid to the implementation of international standards in production. This suggests that activities in this direction will continue.

After 2016, the transition to a model of complete processing of raw materials and the termination of their export acquired an

accelerated nature. It was openly announced that from 2020 the export of cotton from Uzbekistan will be completely stopped, and all raw materials will be processed within the republic. Already in 2018, against the background of an eight percent increase in cotton fiber production compared to 2016, the share of cotton exported dropped sharply to 18.4 percent, and 81.6 percent of the harvested cotton was already processed domestically. Last year, this ratio was 11 percent for export and 89 percent for domestic processing. At the same time, against the background of a decrease in the volume of cotton exports, the export volumes of textile and clothing and knitted products only grew. It should be noted here that the ongoing export of white gold is most likely associated with the fulfillment of obligations under long-term export contracts. It is expected that in 2021, 99 percent of the processed cotton fiber will already be used for the needs of the domestic industry.

Among the main indicators of the quality development of the industry is an increase in demand for its products in foreign markets. Currently, the textile industry of Uzbekistan is export oriented. Textile and garment products produced by domestic enterprises are in demand among buyers both in the domestic and foreign markets, and over the years are gaining more and more popularity among foreign consumers. This is evidenced by the fact that over four years, exports were able to increase 2.1 times: from \$ 899 million in 2016 to \$ 1,867 million in 2020.

Textile and garment products of Uzbekistan are supplied to many countries of the world, and the export geography is expanding annually. For example, if in 2016 products were supplied to 60 countries, then in 2020 - already to 71. However, it should be noted here that currently only six countries account for 89 percent of total exports of textiles and clothing. So, at the end of 2020, Russia accounts for 36.5 percent, China - 21.6 percent, Kyrgyzstan - 15.2 percent, Turkey - 11.4 percent, Poland and Kazakhstan - 2.3 percent each. At the same time, 95 percent of the export of finished garments and knitwear falls on the CIS countries. This indicates that the level of diversification of export geography remains low.

It is quite natural that the adoption of such extensive measures to support the light industry should be accompanied by an increased return for the country and the population due to the creation of jobs, an increase in the general level of income, tax revenues to the State budget, which has happened in recent years. The dynamic development of the textile and clothing and knitwear industries in 2017-2020 had a significant positive effect on the national economy.

As you know, the issue of employment of the population is acute in Uzbekistan. Despite the progressive growth, the economy is not yet able to meet the demands of a rapidly growing population for the required number of jobs. The textile and clothing industries, as labor-intensive industries, have the ability to create massive jobs. Over 2017-2020, the development of industries led to more than a threefold increase in jobs: from 100.5 in 2016 to 315 thousand in 2020. The largest increase in jobs in 2020 relative to 2016 is noted in the production of knitwear - 3.3 times. Last year, the share of the sewing and knitwear production, that is, the output of finished products, accounted for 70 percent of all employed in the industry, while in 2016 - 61.

Another important effect is an increase in revenues to the state budget. Annual budget revenues from textile and garment and knitwear enterprises quadrupled - from 309 to 1227 billion *soums*. However, it should be noted that in connection with the pandemic and the response measures to support enterprises, revenues in 2020 were lower than in 2019, when the state budget received taxes from textile and clothing enterprises for a total of 1,552.5 billion *soums*, which is more than in 2016, five times in nominal terms.

According to the decree of the President "On measures to further develop the light industry and stimulate the production of finished products" dated September 16, 2019, forecast indicators for the development of light industry branches until 2025 were approved. In particular, target parameters were set to bring the volume of production of textile and garment and knitted products to \$ 15 billion with an increase of 3.5 times compared to 2019. It is planned to increase the export of

textile and clothing products by 3.3 times by 2025 to \$ 7 billion.

In production, the main development trend in the coming years will directly proceed from tasks and accumulated experience. First of all, this is a further increase in production volumes and sales of finished products with high added value. The main trends will be further diversification of the range of manufactured goods, mastering the production of new types with a gradual transition to the production of technologically more complex products. This will require improving approaches to training personnel for the textile industry, attracting leading world brands in the field of textiles and clothing to launch production facilities in the republic. In addition, it is necessary to develop related industries, which are suppliers of manufactured goods for light industry, for example, chemical and gas chemical. Also, the further introduction of international standards in the textile sector in production will improve the quality of products.

It is planned to make fuller use of the export potential and increase the export of domestic textile, sewing and knitted products. Exports are projected to grow to \$ 2.8 billion in 2021, up nearly 50 % from 2020. The goal is ambitious but achievable. So, for the year it is planned to increase the export of garment and knitwear by 2.2 times: from \$ 657 million in 2020 to \$ 1,428.2 million in 2021. As a result, the share of garments and knitwear in the volume of exports of textiles and clothing will increase from 35 to 50 percent. For comparison and reference: the share of clothing in the total export of textiles and clothing in Vietnam is more than 75 percent, China - 53. Regarding the export potential and obtaining the GSP + status from the European Union, it will be useful to recall that the President of Uzbekistan in his Address to the *OliyMajlis* noted: in the textile industry, this will make it possible to increase the export of products by almost 300 million dollars a year.

In addition, further diversification of the export geography of finished garment and knitwear is also important. For example, if in 2020 almost all of the volume was supplied to the CIS countries, of which 52 percent came to the Russian market, then in 2021, against the background of export growth, it is expected

that the share of the CIS countries will decrease to 80 percent, while in Europe, including Turkey, will account for 17 percent compared to 3.4 at the end of 2020.

The export turnover of goods in foreign currency (excluding precious metals) is subject at a zero rate. The rates of income and property tax for exporting enterprises (excluding the sale of raw materials) will be reduced in accordance with the share of their exports of goods (works, services) in the total volume of exports to the EAB: from 15% to 30%. for export - 30% ha; 30% or more - up to 50%. The single tax rate for micro and small businesses will be reduced by the same amount. In addition, microfirms and small enterprises will be exempted from the mandatory sale of 50% of foreign exchange earnings from the export of goods (works, services), which will allow enterprises to use the remaining foreign exchange to strengthen and develop their production.

In the development of the export potential of the textile industry, until January 1, 2016, textile enterprises that sell 80 percent or more of their products, including semi-finished products (yarn, fabrics, knitted fabrics and cotton waste), in EAV will be exempt from property tax. Another additional incentive for enterprises to participate in exports is the abolition of export customs duties on all goods (work, services) and licensing of the export of goods (work, services), except for certain types.

Since August 2011, new customs clearance rates have been approved for the export of goods, which, on average, are almost 2 times lower than the current rates. Much attention is paid to enterprises with foreign investments

that carry out export-import operations. In particular, in accordance with paragraph 9 of the Decree of the President of the Republic of Uzbekistan dated January 10, 2012 No. PF-4434, they were provided with a number of benefits and advantages. In particular, enterprises with foreign investments independently carry out export-import operations in accordance with the requirements of the legislation of the Republic of Uzbekistan. Currently, no licenses or quotas are required to export their products. Also, this category of business entities has the right to import products for their own production needs without a license in accordance with the legislation of the Republic of Uzbekistan. In accordance with the Tax Code of the Republic of Uzbekistan and the Decree of the President of the Republic of Uzbekistan dated April 11, 2005 No. 3594 "On additional measures to stimulate foreign direct investment", the Republican Road Fund for enterprises attracting foreign direct investment. A manual procedure for mandatory payments has been defined. In accordance with the Tax Code of the Republic of Uzbekistan, enterprises specializing in the production of goods in sectors of the economy that attract foreign direct investment, according to the approved list, are exempt from the following taxes: corporate income tax; property tax; improvement and development of social infrastructure; single tax payment; Mandatory payments to the Republican Road Fund. According to the approved list, enterprises specializing in the production of products in sectors of the economy include enterprises with a share of at least 60% in the total sales of the reporting year according to the approved list.

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