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# THE CURRENT STATE AND CHALLENGES OF THE GLOBAL TEXTILE INDUSTRY: KEY DIRECTIONS FOR THE DEVELOPMENT OF UZBEKISTAN'S TEXTILE SECTOR

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**Abstract:** This article discusses the current state of the global textile industry, including the volume of textile product manufacturing in developed countries, the size of the European textile market, and issues such as digitalization of the textile industry, sustainability, and the development of advanced technologies. Additionally, it provides insights into the current economic potential of Uzbekistan's textile industry, the domestic and foreign policies being implemented in the sector, and their outcomes, as well as the conditions being created for entrepreneurs in this field within Uzbekistan.

**Keywords:** Global textile industry, wide assortment, textile exports, production of finished goods, international fashion, design agencies, fabric categories.

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**Introduction.** Among the world's industrial sectors, the textile industry stands out as one of the largest. The total volume of the global textile market is currently estimated by analysts to be worth \$450 billion. The annual growth rate of textile and apparel consumption averages 2.2%. This industrial sector generates over €200 billion in annual turnover and employs more than 20 million people globally.

In the European Union, countries producing textiles and apparel focus on high-quality production. In Portugal, high-value products constitute 22% of the total industrial output, while in Italy this figure is 12%, and in Germany, France, and Spain it stands at 6% each.

The rapid development of the textile industry is closely linked to the globalization of the global economy. Over the past 10-15 years, significant changes have occurred in the textile sector. The deepening globalization of the global economy has shifted the center of textile production. Today, Southeast Asia, the Middle East, South America, China, Pakistan, India, Turkey, and other countries host dozens of textile companies with annual turnovers of approximately \$500 million.

Currently, China leads the global textile market and continues to expand. Analysts predict that the textile industry will become increasingly diversified in the future. In this regard, companies aim to expand their product range, redirect production toward new markets, and develop new production types to increase efficiency, economic profitability, and prevent bankruptcy.

However, this does not imply that China's decisive role in the global textile market will diminish. Instead, developing countries in Southeast Asia are increasingly becoming key competitors, particularly in the low-cost category. The World Bank identifies Asian

countries like Bangladesh as some of the most promising textile exporters in the near future. Nations such as India, Vietnam, Cambodia, Indonesia, and Sri Lanka are also expected to join this group.

### **Literature review**

In their article, professors Bahar Divrik and Baykaleli from Istinye University in Turkey discuss that Turkey's textile and apparel industry is primarily export-oriented. Like other developing industries, it plays a crucial role in Turkey's economic globalization through its contribution to GDP, trade, and employment. The article examines the main changes shaping the internationalization process of Turkey's textile and apparel industry. The researchers analyze the economic impact of Turkey's cotton industry and outline critical strategies to enhance its competitive advantages. Additionally, they critique the development of Turkey's textile and apparel industry, assess the global growth of the sector, and evaluate the influence of global trends on Turkey's textile and apparel sector. The researchers aimed to provide an analytical representation of the current state of Turkey's textile industry. Other studies in this field focus on specific aspects or geographic locations of Turkey's textile and apparel industry.

In the context of a rapidly developing global industry, issues like digitalization and the development of advanced sustainable technologies hold significant importance for Turkey's textile industry. The researchers describe the textile and apparel industry as one of the most polluting sectors worldwide, citing its contribution to environmental issues such as climate change, water scarcity, and chemical pollution. They emphasize that Turkish textile and apparel manufacturing is a critical part of value chains for many international brands. Therefore, they argue that Turkey's textile and apparel industry must focus more on sustainability and take necessary measures to promote sustainable production. Turkish manufacturers' success is attributed to consumer-focused approaches such as branding, design, flexibility, quick response, quality, and service.

In his scholarly article, Y.A. Popov from St. Petersburg State University argues that ensuring the consistent development of the light industry globally as a distinct economic sector requires an increasing interest from governments in supporting this field. This includes stable financing, adopting development programs, and implementing various projects while widely disseminating innovative educational programs. He emphasizes that digitalization can fully assist in implementing these activities, supporting the growth of enterprises and the industry as a whole, and reviving the light industry sector in a new era, as seen in other countries. In such conditions, the state should provide not only organizational assistance but also regulatory, financial, and overall incentivizing support.

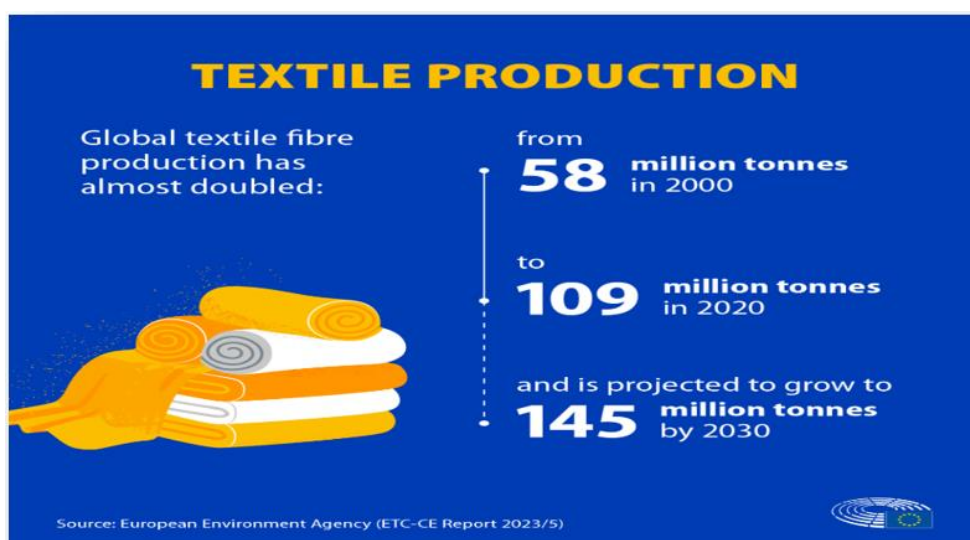
Russian scholars T.V. Gomelko, Y.A. Bortnik, and M.A. Ovsyannikova highlight that, currently, local producers hold less than 50% of the market share for light industry products in Europe and Asia, with the rest dominated by manufacturers from China, Turkey, and others. They suggest that the future of light industry development lies not only in producing clothing, footwear, bags, and bedding but primarily in creating products that meet the demands of other industries. Their studies show that the light industry sector provides numerous job opportunities, with a significant majority of its

workforce being women. The authors stress that governments should focus on the challenges and prospects of efficient operation in the light industry under modern conditions, encourage local producers, and explore ways to support small and medium-sized enterprises involved in the production and sale of light industry products.

The global textile industry features significant contributions from various countries, each playing a decisive role in shaping market dynamics. China leads as the largest textile producer and exporter, leveraging its extensive manufacturing infrastructure and cost advantages. India is renowned for its diverse range of textile products and rich heritage of natural fibers like cotton and silk. Countries like the United States, Italy, and Germany are recognized for their high-quality textile manufacturing, innovations, and sustainable practices. Developing economies such as Bangladesh and Vietnam are rapidly expanding their textile sectors based on competitive labor costs and favorable trade agreements. Together, these nations manage the global textile industry, contributing to its growth and evolution through their unique strengths and opportunities.

The European textile market is projected to reach \$185.80 billion by the end of 2024 and grow to \$219.89 billion by 2029, reflecting an annual growth rate of 3.43% during the forecast period (2024–2029). In Europe, the textile industry significantly contributes to the economy, employing nearly 6% of the overall labor force in manufacturing. Digital platforms and marketing strategies are becoming increasingly prevalent in the European fashion market, with the growth of e-commerce enabling companies to engage consumers through virtual reality. The fashion and online clothing industry have witnessed the most significant growth in e-commerce sales. The rise of online platforms has driven consumer spending on clothing through these channels, leading to increased sales and revenues in the European textile market.

Key factors contributing to the growth of natural fibers in the global market include the benefits associated with their use, increasing demand across various industries, and the rising popularity of silk- and wool-based products.



The reproduction rate of global textile fiber production

Furthermore, the rise of sustainable agricultural initiatives is a key factor contributing to market growth. Natural fiber-based (organic) clothing includes materials made from cotton, jute, silk, kapok, hemp, or wool. The demand for organic clothing is increasing as more consumers are becoming environmentally conscious. The European textile sector is particularly active in research and development for the production of new and innovative products, taking into account the health and environmental advantages of organic materials. Environmentally conscious consumers are increasingly shifting toward garments made from organic textiles. In response to consumer demand and the need to green their operations, the fashion industry is taking new steps toward the use of more eco-friendly fabrics. Even fast fashion giants are incorporating organic and recycled alternatives.

In Uzbekistan, significant efforts are also being made to align textile products with international standards and to increase production and export volumes. For instance, during a video conference chaired by President Shavkat Mirziyoyev on April 16, measures to increase export and investment volumes in the textile sector were discussed.

At the meeting, the President highlighted that due to active investment and the adoption of new technologies in recent years, the sector's performance has rapidly improved. Specifically, in 2023, \$8.2 billion worth of textile and knitwear products were produced—4.2 times more than seven years ago. He also noted that export volumes in the sector amounted to \$3.1 billion, with plans to enter three new markets by the end of the year, expanding the export geography to 83 countries.

While acknowledging these achievements, the President also pointed out several shortcomings in the sector. These include the low share of high-value-added finished goods in exports, the fact that approximately 80% of exports are directed to traditional markets, insufficient export volumes to Europe, and the need for international standards and certifications to increase exports to developed countries and major brands. Only 175 enterprises in Uzbekistan currently meet such standards, and in 18 districts, the annual production volume of textile products does not even reach \$1 million. He emphasized that the only viable path for the sector is to create high-value-added products by fully processing available raw materials and transitioning from traditional low-cost markets to new ones.

Recognizing the rapidly changing demand for product diversity in the global textile market, the following tasks have been outlined for Uzbekistan's textile

industry to create promising types of finished fabrics using modern weaving equipment:

1. Establish long-term contracts for textile production with major brand manufacturers by entering cooperation agreements with international fashion and design agencies.
2. Increase the production of finished goods by 4-5 times over the next five years, reduce costs to be more competitive, and capture foreign markets by expanding the product range and significantly improving quality.
3. Develop technoparks in Namangan, Samarkand, and Tashkent regions for new textile enterprises focused on exporting finished products.
4. Gradually upgrade production technologies in textile enterprises.
5. Transition to producing eco-friendly clothing.
6. Expand the production of specialty fabrics with features like decorative elements, wrinkle resistance, durability, and low material density.
7. Improve the training quality of skilled technical personnel for the textile industry.
8. Gradually introduce "smart clothing" technologies that align with contemporary health-related requirements.
9. Develop new materials from non-traditional raw materials and secondary resources.
10. Segment promising new product markets, expand sales markets, and diversify exports to countries in Asia, Africa, and America.
11. Introduce nanotechnology applications in the textile industry.

In conclusion, implementing these tasks will require developing highly efficient technologies for producing competitive, high-quality fabrics using state-of-the-art equipment. This goal should be based on theoretical and experimental research into textile technological processes.

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