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Article

Issues of Increasing the Competitiveness of Food Industry Enterprises in Uzbekistan

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Abstract: This article analyzes the activities of food industry enterprises in Uzbekistan based on statistical data. The development of the industry, the study of factors influencing it, and the comprehensive advancement of food production enterprises under conditions of intense competition are identified as key tasks being implemented in the republic. The research examines specific features of effective management of food industry enterprises on the basis of theoretical and practical data and provides recommendations for improving the management mechanisms of industrial enterprises.

Keywords: industry, food industry, management, management mechanism, export, import, management structure, specialization, human factor, division of labor

1. Introduction

We should now also mention the good structural changes in the national economy are being made... which are beginning to bear that down right on to teh living standards of the people of Uzbekistan." For the past few years, a steady and well-thought-out economic policy intended to upgrade production, expand industrial sectors and enhance the competitive capacity of national enterprises has been followed on principle. In the process, a sound institutional and economic base was formed for growth of the leading branches thanks to extensive social and economic reforms as well as state development programmes [1].

In view of this, food industry is strategically important part of national economy. It is crucial in the provision of food security, to meet domestic demand for key consumer products, temper prices and support sustainable economic development. Uzbekistan's food industry became one of the most developed industries under independence, from a mere primary-processing requirement to a diversified high-tech industrial sector. This change has driven up food crop yield growth and enabled the country to serve the dawning demand for food supply [2].

Simultaneously, with the deepening of the globalization and the development of international trade and further opening up of the national economy, competition has also become more and more intense in food market. Native food industry companies are finding themselves operating under strong competition open market conditions, including pressure of imports and new growing foreign producers. In this situation, to

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promote the competitiveness of the food industry enterprises is an urgent task not only for enterprises themselves, but also from aspect of national economic policy.

Regarding the production volumes and processing capacity dynamics are encouraging, however, there remain systemic problems that hamper further development of the food industry of Uzbekistan. Among these reasons are: relatively high production costs, low levels of technological updating, little application of innovative and saving-energies technologies and weakness in logistics, marketing and management systems [3], [4]. Moreover, reliance on imported food for some products groups remains high and this poses risks to food security and undermines the domestic market's resilience to external shocks.

In these circumstances it is especially relevant to enhance the management mechanisms in industry food enterprises, increase production efficiency and integration with an agricultural complex. New styles of management, digital technologies and scientifically based tools of decision-making can have a great influence upon the performance of enterprises and their competitiveness [5]. In addition, the evolution of various clusters and efficient cooperation, specialization and division of labor can lead to an increase in value added as well as export potential and sustainable development in the sub-sector.

Thus, the significance of the study lies in the fact that food industry enterprises in Uzbekistan require an inclusive estimation of their current state and identification of determining factors affecting their competitive levels [6]. The objective: to trace the trends in development of food industry and identify regional and industries specifics, present practical recommendations for improving the mechanisms of management functioning increasing competition of enterprises of food industry on both domestic and international markets.

Literature Review

The activities of the food industry have been studied by foreign researchers such as X. Bitner, P. F. Drucker, D. McKean, D. Mann, R. Sfaim, V. J. Stevenson, A. A. Thompson, F. Webster, and others. Their studies focus on improving management mechanisms in the industrial sector, including the food industry, and on developing the sector through vertical and horizontal cluster-based approaches [7].

Numerous scientific studies have also been conducted in Uzbekistan on the development of the food industry and the improvement of its management mechanisms. In this regard, the works of local scholars such as B. Berkinov, I. Boboev, U. G‘afurov, O. Ismailov, N. Sotvoldiev, O. Sh. Ismailov, and I. Yu. Umarov have developed and analyzed methodological approaches for assessing the development of the food industry and the economic potential of enterprises in Uzbekistan. The financial and economic potential of food industry enterprises in the regions has been practically evaluated [8].

2. Materials and Methods

Analysis of Industry Development. In the national economy, the gross domestic product (GDP), industrial output, and food production volumes demonstrate a steady growth trend. Specifically, in 2024, GDP increased by 6.92 times compared to 2015, industrial output grew by 9.01 times, and food production increased by 5.54 times. As of the end of 2024, GDP amounted to 1,454,573.9 billion UZS, total industrial output reached 880,198.5 billion UZS, and food industry output amounted to 102,732.6 billion UZS. This indicates that the growth rate of food production is relatively high compared to GDP and total industrial output.

In our view, it is essential to apply scientific approaches to the management of food industry enterprises and to further develop import substitution and localization systems aimed at replacing imported products with domestically produced goods. The extensive

use of econometric models adapted to the management structures of such enterprises can help reduce the impact of seasonality and improve management mechanisms, thereby accelerating sectoral development and increasing economic efficiency.

3. Results

Table (1) Volume of Industrial Production by Regions in 2019–2024[1] (billion UZS)

	2019	2020	2021	2022	2023	2024	Food products volume, 2024	Share of food products in total industrial output, 2024 (percent)
Republic of Uzbekistan	**322 535,8**	**368 740,2**	**456 056,1**	**553 265,0**	**658 991,7**	**880198,5**	**102732,6**	**11,7**
Republic of Karakalpakstan	12 736,1	13 981,3	16 630,4	17 624,7	17 791,1	24323,5	2 937,1	16,5
Tashkent city	52 747,5	66 188,0	90 211,9	108 807,7	124 116,4	171706,2	6 736,7	5,4
Andijan region	33 122,3	36 376,5	35 935,3	54 352,5	73 767,1	90626,6	2 615,4	3,5
Bukhara region	14 798,2	17 574,4	20 772,1	27 202,4	31 860,4	42243,7	4 268,3	13,4
Jizzax region	4 586,1	5 823,8	8 731,8	11 402,0	19 197,3	24903,7	1 447,7	7,5
Kashkadarya region	20 360,1	14 612,3	18 771,9	22 624,4	28 767,7	39116,8	2 627,4	9,1
Navai region	44 438,1	65 084,9	73 633,5	84 393,7	101 841,9	145615	2 481,9	2,4
Namangan region	8 818,1	11 011,9	14 695,1	18 120,5	21 906,8	31696,2	3 053,9	14,0
Samarkand region	15 783,6	18 383,4	22 834,3	29 188,6	32 955,7	45408	9 171,7	27,8
Surkhandarya region	4 231,3	5 322,7	6 675,3	7 229,8	8 848,6	13819,8	1 228,0	13,9
Sirdarya region	7 293	7 990,9	9 813,3	12 011,2	15 348,1	20064,5	2 344,4	15,2
Tashkent region	53 484,8	65 949,9	83 433,9	93 935,1	106 915,3	138555,4	11 426,0	10,7
Fergana region	18 661,2	21 701,2	27 761,5	30 303,5	35 794,9	45896,1	4 568,8	12,8
Khorezm region	8 538,6	9 615,9	13 658,1	18 323,3	21 589,1	28438,8	4 126,4	19,1

Based on the data on food production in 2023, it can be noted that out of the total food products produced nationwide, amounting to 65,678.2 billion UZS, 11,426.0 billion

[1] Note: Compiled based on data from the State Statistics Committee of the Republic of Uzbekistan.

UZS, or 17.4 percent, accounted for the Tashkent region [9]. The next largest share belonged to the Samarkand region with 9,171.7 billion UZS, representing 14.0 percent. The lowest production volumes were observed in the Surkhandarya region (1,228.0 billion UZS) and the Jizzakh region (1,447.7 billion UZS).

In addition, an analysis of the share of food production within total industrial output in 2023 was conducted. The results show that the Samarkand region ranked first in terms of the share of food products in total industrial production.

Specifically, in the Samarkand region, food products accounted for 27.8 percent of total industrial output. This was followed by the Republic of Karakalpakstan (16.5 percent) and the Syrdarya region (15.2 percent). The lowest indicators were recorded in the Navoi region (2.4 percent) and the Andijan region (3.5 percent).

The share of food production in the total industrial output of the republic declined sharply by 2018, reaching 13.3 percent [10], [11], [12]. This trend was primarily driven by the rapid growth of other sectors and industries mentioned above. By 2021, the share further decreased to 12.9 percent, and by 2022 it fell to 12.5 percent. A key contributing factor was the relatively low level of innovation in production processes within food industry enterprises compared to sectors such as textiles and knitwear, chemical products, furniture manufacturing, and automotive production. Although the real volume of food production increased, its share in total national production declined due to the faster growth of other industrial sectors.

In Uzbekistan, the volume of food production increased by 113.2 percent in 2015 compared to the previous year [13]. However, by 2018, the output of the food industry slightly declined, amounting to 98.5 percent compared to 2017.

An analysis based on the data in Table 2 shows that in 2015 the total volume of imports to Uzbekistan amounted to USD 11,924.0 million, of which USD 1,314.0 million accounted for food products and live animals. In 2017, total imports reached USD 13,370.0 million, with USD 1,049.0 million attributed to food products and live animals.

Table (2) Total Imports to the Republic of Uzbekistan, Including Food Products, 2018–2024[2] (million USD)

Indicators	2018	2019	2020	2021	2022	2023	2024	Change in 2024 compared to2018 in %
Total imports	17312,3	21866,5	19932,4	23740,4	28220,3	35574,8	35289,8	203,8
Food products and live animals	1327,4	1608,5	1851,3	2509,5	3392,9	3495,7	3695,8	278,4
Share in total imports	7,7	7,4	9,3	10,6	12,0	9,8	10,5	2,8

By 2022, total imports increased nearly threefold compared to 2015, reaching USD 30,767.0 million, of which USD 3,392.0 million accounted for food products and live animals. This growth is largely associated with population growth and an increase in real household incomes.

[2] Prepared based on data from the State Statistics Committee of the Republic of Uzbekistan.

In Uzbekistan's foreign trade turnover, imports of food products and live animals amounted to USD 1,327.4 million in 2018, increasing to USD 3,695.8 million by 2024. In 2024, the share of food products and live animals in total imports reached 10.5 percent.

Even during and after the global pandemic, food imports did not decline. On the contrary, by 2022 they increased nearly 2.5 times compared to 2018, whereas total imports grew only 1.6 times during the same period. This clearly indicates that the food industry has consistently remained a critical economic issue [14], [15].

The volume of food imports remains relatively high. In particular, imports included cereals and cereal products amounting to USD 1.12 billion (+5.3%), sugar, sugar products, and honey amounting to USD 558.2 million (−2.3%), coffee, tea, cocoa, and spices totaling USD 385.3 million (+23.0%), vegetable oils and fats amounting to USD 354.9 million (+16.4%), meat and meat products totaling USD 348.4 million (+9.1%), vegetables and fruits amounting to USD 348.4 million (+23.5%), and dairy products and bird eggs totaling USD 211.5 million (+31.7%). Such figures are relatively high for a country with significant agricultural potential.

4. Conclusion

Thus, on the one hand, insufficient knowledge and development of management methods and mechanisms for food industry enterprises, and on the other hand, the scientific and practical significance of this issue, determined the choice of the research topic.

The results of the statistical analyses demonstrate that increasing the competitiveness of food industry enterprises in Uzbekistan is one of the key factors of economic development. The analyses confirm that in recent years positive changes have been observed in food production volumes, processing levels, and domestic market supply indicators. However, high production costs, insufficient rates of technological modernization, and problems in logistics and marketing infrastructure negatively affect enterprise competitiveness.

Based on statistical data, the analyses indicate that increasing investment volumes, widely introducing innovative and resource-saving technologies in production, as well as developing digital management and quality management systems can significantly enhance enterprise competitiveness. At the same time, strengthening cooperation with the agricultural sector and developing a cluster-based approach contribute to improving production efficiency and expanding export potential.

Overall, enhancing the competitiveness of food industry enterprises is closely linked to improving state support measures, enhancing the investment climate, and deepening institutional reforms in the sector. This process plays an important role in ensuring national food security and strengthening economic stability.

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