

Uzbekistan's Strategic Power in the Context of the Concept of Comparative Advantage: Cotton

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Abstract

Uzbekistan, which is in a region where the oldest settlements in the world are located and has a very rich culture and derives its source of wealth from Uzbekistan's history, is also the largest cotton producer and exporter in Central Asia. Cotton is an important agricultural product of Uzbekistan and one of the most important sources of income for rural households.

Cotton is a product of great economic importance for humanity with its widespread and compulsory use, and for producing countries with the added value and employment opportunities it creates.

Cotton, a renewable resource that can never be replaced, can provide employment to economic factors such as natural resources, capital and labor, and makes a great contribution to the economy. In this context, cotton is one of the most important products for Uzbekistan from past to present.

In this study, in addition to general information about cotton, some recent data on world cotton production and economy are shared, cotton trade around the world, the current situation of Uzbekistan's cotton sector, its strength and rates in the international market are tried to be analyzed, and its effects are discussed.

Keywords: Uzbekistan, Cotton production, Source of income, Cotton exports

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Mukayeseli Üstünlük Kavramı Bağlamında Özbekistan'ın Stratejik Gücü: Pamuk

Özet

Dünya üzerindeki en eski yerleşim alanlarının yer aldığı bir bölgede olan ve çok zengin bir kültüre sahip olan ve bu zenginlik kaynağını Özbekistan'ın tarihinden alan Özbekistan, aynı zamanda Orta Asya'nın en büyük pamuk üreticisi ve ihracatçısıdır. Pamuk Özbekistan'ın önemli bir tarımsal ürünüdür ve kırsal hane halkının en önemli gelir kaynaklarından biridir.

Pamuk, yaygın ve zorunlu kullanım alanıyla insanlık açısından, yarattığı katma değer ve istihdam olanaklarıyla üretici ülkeler açısından büyük ekonomik öneme sahip bir üründür.

Yenilenebilir bir kaynak olan pamuk asla yeri doldurulamayışı ile doğal kaynaklar, sermaye ve işgücü gibi ekonomik faktörlerin istihdamını sağlayabilmekte ve ekonomiye büyük bir katkı sunmaktadır. Bu bağlamda Özbekistan için pamuk geçmişten günümüze önemli bir yer teşkil eden ürünlerin başında gelmektedir.

Bu çalışmada, pamuk hakkındaki genel bilgilere ek olarak, dünya pamuk üretimi ve ekonomisi ile ilgili bazı son dönem verileri paylaşılmış, dünya genelinde pamuk ticareti, Özbekistan pamuk sektörünün mevcut durumu, uluslararası piyasadaki gücü ve oranları analiz edilmeye çalışılmış ve etkileri tartışılmıştır.

Anahtar Kelimeler: Özbekistan, Pamuk üretimi, Gelir kaynağı, Pamuk ihracatı

Introduction

The Uzbek people, who pioneered the Turkistan civilization, have a key role in the political, economic and cultural transformation process that Central Asia is going through. Home to ancient civilizations and located at the center of the historical Silk Road, Uzbekistan still has a very important place in the Eurasian geography. With its deep-rooted historical past and state tradition, its young and dynamic population of more than 34 million, which corresponds to approximately half of the Central Asian population, its geo-strategic location in the heart of Asia, its rich natural resources and fertile lands, Uzbekistan is a country capable of playing an important role in the region and beyond.

Uzbekistan, which declared its political independence in 1991, remained under the central planning system economically for approximately 70 years before gaining political independence. Due to the lack of a market mechanism in the central planning system, efforts to transition to a market economy gained momentum after the political independence process. Uzbekistan has an economic structure dominated by the agricultural sector. For this reason, although difficulties may arise in the transition process, the Uzbekistan administration has envisaged a gradual transition system in order to get rid of the Soviet-type economic legacy. In this context, a primary economic strategy based on export and agriculture sector has been adopted. It is aimed to accelerate the industrialization process by

supporting other industrial branches, to gain the ability to achieve self-sufficiency in some strategic goods and services, and to follow protectionist policies in newly established industrial branches. The administration of Uzbekistan has strengthened the fundamental reformist identity of the state by keeping the economy above politics during the transition from the central planning system to the market mechanism. It has made plans within the framework of five basic issues, such as protecting the social rights of low-income groups and gradually transitioning to a market economy, based on the rule of law (Mirzayev, 2016: 214-215).

When the sectoral distribution of the Uzbekistan economy is examined, it is seen that while the agricultural sector had the highest share in the gross domestic product in the first years of the independence period, the share of the service sector increased in the following years and had the highest share in the gross domestic product in all years after 1996. The reason why the share of the agricultural sector was initially high is that the Union of Soviet Socialist Republics forced Uzbekistan to specialize in agriculture and semi-finished products. The Union of Soviet Socialist Republics has specialized Uzbekistan in agricultural products, especially cotton, in order to meet its own needs. Then, it was planned to gradually reduce cotton production and reduce the state's cotton purchasing quota (Karluk and Gencer, 2016: 222).

Today, the cotton sector constitutes an important component of economic growth in many developing countries due to its contributions to the national economy. The cotton sector is one of the indispensable sectors for the economy of Uzbekistan due to its contributions to the national economy, employment and

exports. As stated by Djanibekov et al. (2010), cotton is called White Gold and has a strategic importance for the Uzbek economy.

As stated by Bashimov (2015), Uzbekistan is one of the countries with a significant share in the world cotton production, with the production of approximately one million tons of fiber cotton. However, recently, significant decreases have been observed in Uzbekistan's cotton production and exports. While the country had a say in world cotton production and export in the 1980s, it is slowly losing this position today. Because, with the entry of China, India, Pakistan and some West African countries into the cotton market, the competitiveness of the Uzbekistan cotton industry is weakening day by day. In this context, this study tried to analyze the current situation of the Uzbekistan cotton sector, its strength and rates in the international market.

World Cotton Industry

Cotton is grown in various geographical regions around the world. At the forefront of these regions is the Asian continent, which accounts for approximately 63% of the world's cotton cultivation areas, followed by America with 20% and Africa with 14%. In the 2019/20 season, approximately 29 million farmers in 77 countries around the world produced cotton. 84% of global cotton is produced by 7 countries including India, China, America, Brazil, Pakistan, Turkey and Uzbekistan (ICAC, 2021).

Cotton is one of the important agricultural products produced in almost every continent. Cotton is an industrial plant that is of direct interest to 68 countries around the world in terms of production and consumption; It is both produced and consumed (used as raw material in the industry) in 45 of these

countries, and only consumed in the remaining 23 countries. Despite this prevalence, almost all (99.5%) of the world's cotton production is carried out by 10 major cotton producing countries; These are listed as China, India, USA, Brazil, Australia, Turkey, Pakistan, Uzbekistan, Argentina and Greece. A significant portion of world cotton use, 85%, is carried out by 8 major cotton consumer countries, and these countries are listed as China, India, Pakistan, Turkey, Vietnam, Bangladesh, Uzbekistan and Indonesia.

The prevalence of its production and consumption makes cotton an important global commodity. Some countries also stand out in cotton foreign trade, which has increased to one-third of production and usage in recent years: 80% of world cotton exports are from 6 major exporting countries (USA, Brazil, Australia, India, Greece and West Africa-CFA countries: Mali, Benin, while 70% of the world's cotton imports are made by 5 major importing countries (China, Vietnam, Bangladesh, Turkey and Pakistan). Accordingly, China, India, Pakistan and Turkey, as the four major cotton countries that stand out in both production and consumption, form a special competitive group (Balçık and Evcim, 2022: 1).

Although there has been a decrease in cotton cultivation areas in the world since 1980, there has been an increase in its production due to the increase in productivity. More than 80% of the world cotton production is met by 7 countries (India, China, USA, Brazil, Pakistan, Turkey, Uzbekistan), including Uzbekistan. These countries also use almost the same amount of cotton in their industries. Therefore, the cotton plant makes positive contributions to the development of both agriculture and industry in the countries where it is grown.

In addition, population growth and the rise in living standards also increase the demand for cotton plants. With these aspects, the need for cotton is increasing all over the world, and it is expected that the production and consumption values, which decreased due to the economic crisis felt in the past period, will increase in the coming period (Ministry of Customs and Trade, 2018: 1, Ministry of Trade, 2019).

Cotton industry in the world; It is supported by many different tools such as price supports given directly to production, customs protection measures, insurance supports, minimum price support mechanisms, input and transportation supports (ICAC, 2020).

There are also some negativities and problems that need to be solved in the cotton sector, which has such great importance in the world economy. For example, factors such as global climate change, regional effects of temperature and precipitation, and the increase in average temperatures around the world over time create serious problems in cotton's adaptation to such changes. There are many different types of threats facing farmers growing cotton around the world, including reduced profitability, overuse of energy and excessive water, poor water quality, environmental problems, and the planting of transgenic seeds. In addition, yield disparities between China and India, the largest producing countries (1,800 kg/ha versus 500 kg/ha), are also striking (Tokel, 2021: 1032).

Uzbekistan's Strategic Power: Cotton

Cotton production in Uzbekistan dates back thousands of years, and it is recorded that this crop was first grown in the region by Chinese historians. But it was not until the Soviet Union that production expanded dramatically

under a multitude of policies and actions, by controlling the water of the Aral Sea and re-directing its tributaries to expand grain and oilseed production. Uzbekistan is the world's northernmost major cotton-producing country, with the shortest growing season of approximately 5 to 7 months or as short as 150 vegetative days. Ambitious annual targets have led to increased production. 2 million Uzbeks participate in the cotton harvest annually. Mechanization is rare, as 80 percent of cotton is still picked by hand. Uzbekistan's cotton industry is changing rapidly as its people aim to revive and sustain a highly valuable crop called "oq oltin" or "white gold" in the Uzbek language.

Cotton constitutes an important component of the national economy in many developing countries as it is an important cash-generating product. Cotton constitutes an important branch of agricultural production in Uzbekistan (Isengildina, et al., 1998: 297; Abdullaev, et al., ...; Kienzler et al., 2011). Cotton production and trade in Uzbekistan has a long history. According to archaeological findings, cotton farming has been done in Uzbekistan for the 5th-6th century. With Uzbekistan's inclusion in the Soviet Union, more importance was given to cotton agriculture and cotton became a strategic product. Between 1913 and 1940, the agricultural area planted with cotton throughout the country increased from 441,600 hectares to 1,022,600 hectares. In the period 1960-1985, cotton cultivated areas reached from 1.4 million hectares to approximately 2 million hectares, and a significant increase was achieved in the yield obtained per unit area (Spoor, 1993; Djanibekov et al., 2010).

The important commodity that strengthened the economy of Uzbekistan in the 1990s was

cotton. The government of Uzbekistan, which benefits from a large portion of the revenues from cotton, has ensured that social services are higher than in other Central Asian countries. In addition, despite its partial resistance to the rapid reform package proposed by international financial institutions (IMF and World Bank) during the said period, Uzbekistan was the best performing country among the countries that left the Soviet Union in terms of many indicators. However, sharp declines in cotton prices in 1996 led the government to abandon its commitment to currency convertibility and impose strict foreign exchange controls. The deterioration in global demand over the following decade and the government's tightening of foreign exchange controls led to the formation of a significant black market (Tsereteli, 2018).

Uzbekistan's economy has a high dependence on agriculture. While 27% of the country's population is employed in agriculture, the agricultural sector accounts for 28% of GDP. The agricultural product with the highest export is cotton, whose annual production is over 700,000 tons. It contributed 79 million USD to the economy of Uzbekistan in 2020 (Kılıcı, 2022).

Today, Uzbekistan is one of the most important cotton producing countries in the world. Approximately one million tons of fiber cotton is produced throughout the country, which corresponds to a large portion of the world's fiber cotton production. Most of the fiber cotton produced is exported abroad. Before 2000, European countries constituted an important market for Uzbek cotton. However, as a result of the shift in production activities in the textile and ready-made clothing sector from developed countries to developing countries, there was a significant decline

in the amount of cotton exported to European countries. Today, Uzbek cotton is exported to Southeast Asian countries such as China, Bangladesh, Pakistan and Singapore, as well as European countries (Alikulov, 2010).

The global cotton industry is still readjusting for the post-pandemic decline in demand, and Uzbekistan is trying to recover from the effects of the market sag. Uzbekistan's strong vertical integration and government support for the sector are helping to increase both its resilience and recovery. It is estimated that cotton production will be higher due to favorable weather conditions at the beginning of the season, as well as productivity-increasing investments in seed, pest control and water management. Uzbekistan fiber production is expected to reach 699,000 metric tons in the 2024/25 marketing year (MY). Consumption is expected to continue to slowly outpace production as processing capacity increases due to government investments. It is also estimated that lint cotton consumption will be 725,000 tonnes higher in MY 2024/25 (USDA, 2024).

Agriculture, one of the important sectors of Uzbekistan's economy, produces 24.3% of the country's GDP. In 2023, an average of 12.4 million tons of fruit and vegetables, 8.4 million tons of grain products and 3 million tons of cotton will be produced annually on a total of 4 million hectares of irrigated land across the country. Cotton covers a significant part of Uzbekistan's agricultural production and has a large share in agricultural exports. In addition, in order to diversify production, there is a transition to planting grains instead of cotton in some places. Recently, there has been a 25% decrease in cotton planted areas (Republic of Türkiye Ministry of Agriculture and Forestry, 2024: 8).

Uzbekistan farmers rely on various modernization practices to increase yields and maintain cotton production into the future. Crop rotation is already a common practice in Uzbekistan, and wheat/cotton rotation is common in many regions. The Government of Uzbekistan has adopted a new decision allowing the import of experimental high-yielding foreign cotton seed varieties, effective January 1, 2024. The Ministry of Agriculture is working on field trials of both biotechnological seeds and hybrid seeds obtained with traditional plant breeding techniques, and it is expected to be completed within 2 years. Other significant changes include the creation of a state-owned seed reserve and removing the government from its position as the sole seed supplier, allowing private enterprises and clusters to sell seeds commercially. Some of these changes can lead to immediate yield increases by giving farmers access to better quality seeds.

Cotton consumption in the 2024/25 season is estimated to increase to 725,000 MT of lint cotton (2.07 million MT of seed cotton or 3.33 million bales) due to the continuous expansion of existing capacity and government support. Domestic consumption was also increased to 625,000 MT in the 2023/24 season. Cotton clusters indicate continued investment and expansion in textile manufacturing, including yarn and garment production.

The Uzbek Union of Cotton-Textile Clusters (UACC) reported that there are now 142 clusters in their association, a slight increase compared to last year. They have 25,000 farmer members, 128 gin manufacturers, 1 million tons of fiber processing facilities and a capacity of approximately 1.7 million. All five stages of cotton processing are present in Uzbekistan: ginning, yarn, fabric, dyeing and

<i>(Thousands of Metric Tons, 1 bales = 4.5923 metric tons)</i>				<i>(Thousands of 480 lbs. bales, 1 bales = 4.5923 metric tons)</i>			
	MY 2020/21	MY 2021/22	MY 2022/23		MY 2020/21	MY 2021/22	MY 2022/23
<i>Afghanistan</i>	-	1,043	113	<i>Afghanistan</i>	-	4,789	517
<i>China</i>	-	-	252	<i>China</i>	-	-	1,156
<i>France</i>	0.013	-	-	<i>France</i>	0.057	-	-
<i>Italy</i>	0.003	-	-	<i>Italy</i>	0.014	-	-
<i>Iran</i>	-	-	22	<i>Iran</i>	-	-	100
<i>Kazakhstan</i>	-	945	-	<i>Kazakhstan</i>	-	4,341	-
<i>Kyrgyzstan</i>	-	242	304	<i>Kyrgyzstan</i>	-	1,110	1,398
<i>Tajikistan</i>	5,478	9,422	1,370	<i>Tajikistan</i>	25,157	43,268	6,291
<i>Türkiye</i>	0.250	-	-	<i>Türkiye</i>	1.148	-	-
<i>United States</i>	0.123	0.011	0.005	<i>United States</i>	0.564	0.048	0.021
<i>Total</i>	<i>5,478</i>	<i>11,652</i>	<i>2,060</i>	<i>Total</i>	<i>25,159</i>	<i>53,508</i>	<i>9,462</i>

Table 1. Uzbekistan Cotton Imports (HS Code: 5201) *Source: UN Comtrade*

garment manufacturing. However, currently only 30 clusters have the capacity to complete all five stages, 90 have the capacity to spin only, with the rest somewhere in between. Data shows that yarn production stabilized at 553,500 MT in 2023, down 5.5% from 2022. Production started the year higher, increasing by 23.8% between January and February 2024 compared to the same period last year.

Cotton Consumption

Uzbekistan's overall cotton consumption is slowly exceeding production. Historically, Uzbekistan has grown as much cotton as it consumed, but many variables are causing consumption to increase faster than production can sustain it. Major investments made during the pandemic cotton boom have come into play and processing is expected to increase further this year. In 2023, the Government of Uzbekistan allocated US\$50 million to expand processing and plans to allocate another US\$100 million in 2024. These investments are taking place at the same time as the general decrease in hectares. The Uzbek cotton industry is predominantly focused on moving up the value chain and gaining access

to high-margin markets in the European Union and the United States.

Import - Export

2024/25 cotton lint imports are estimated to be 25,000 MT or 115 bales. Discussions with industry and government in Uzbekistan show that imports from neighboring markets such as Turkmenistan and Tajikistan are increasing (USDA, GAIN, 2024).

Qualitative observations of this trade remain difficult, but available information indicates a trend of increasing imports. Uzbekistan's industry has plans to connect with global cotton markets and start importing extra-long fiber varieties from different global origins, such as the United States. Lack of mechanization limits Uzbekistan to short-fiber varieties and therefore restricts what products its cotton clusters can produce. Other resources will not only help offset declining hectares and provide new products and certifications, but will also fill the growing capacity gap.

Uzbekistan's yarn exports increased by 6.1 percent in the 2023 calendar year (Table 1). The recovery in yarn exports reflects the

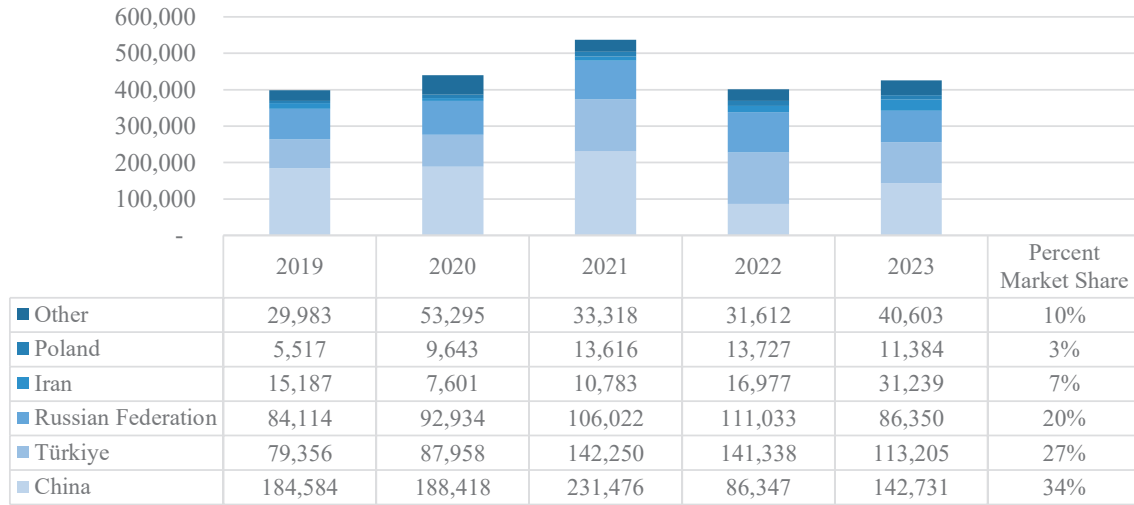
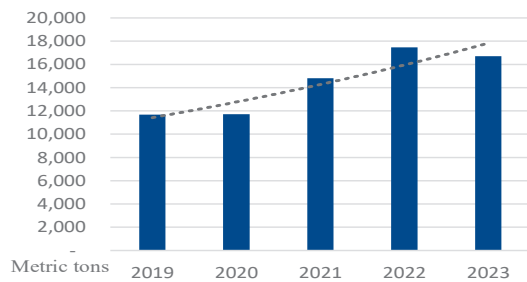


Table 2. Yarn Exports from Uzbekistan (HS Codes: 5204, 5205, 5207) (Source: UN Comtrade)

global recovery in textile trade. Decreases in exports to Russia were offset by increases in exports to China, Iran, Kyrgyzstan and other countries. High yarn stocks compared to the previous year allowed Uzbekistan to increase exports despite the decrease in yarn production in 2023.

Exports of cotton fabrics decreased in 2023, but are well above historical averages and show the changes taking place in the Uzbek cotton industry (Table 2). Cotton clusters have proven successful in moving away from relying solely on yarn exports and expanding into the fabric and dyeing sectors. While cotton fabric exports in the 2023 calendar year decreased by -4.4 percent compared to the previous year, it was 15.4 percent above the five-year average. Cotton fabric exports from



Uzbekistan to the world have increased at a compound annual growth rate of 4.5 percent over the last half decade.

Uzbekistan has long relied on Russia for a significant portion of its cotton yarn and cotton fabric exports. In 2023, 64 percent of Uzbek cotton fabric and 20 percent of its yarn were exported to the Russian Federation. Despite efforts to diversify target markets, Russia's share of exports has remained largely unchanged over the past five years.

As a result, Uzbekistan is one of the most important cotton producing countries in the world. In order not to lose this feature, it tries to protect and maintain its power in every sense, both with high-level policies and agricultural decisions.

Conclusion

Uzbekistan remained under the rule of the Soviet Union, which had a totalitarian regime, for many years and was economically governed by a socialist economic system based on public planning. After gaining its independence, Uzbekistan switched to a different economic model by transitioning to a

market economy. With the structural reforms, it introduced during the transition to a market economy, it tried to both accelerate and institutionalize this transition process. By taking the necessary steps in transparency, accountability and data production processes, the Uzbekistan economy will fulfill one of the important requirements of the market economy. When it completes its institutional development with its strong natural resources and human capital structure, the economy of Uzbekistan will continue its economic progress rapidly by integrating with the world economy depending on political developments.

In this context, Uzbekistan is the world's most important cotton exporter. Cotton and cotton products constitute an important component of the Uzbekistan economy with the foreign exchange income it provides. However, there has been a significant decline in the country's cotton exports in the last twenty years. In this context, it is extremely important that the necessary studies are handled by all actors and the necessary steps are taken. In addition, in order to increase the international competitiveness of the sector, it is important to disseminate environmentally friendly technologies that increase quality and efficiency in cotton production, activate and expand marketing and distribution chains, support R&D investments and increase export incentives. At the same time, some regulations should be made worldwide to ensure that cotton fiber remains competitive and sustainable in the textile industry. In this context, agricultural policies aiming to expand cotton cultivation areas should be developed and implemented especially in regions where high efficiency and quality production can be achieved. In order to solve the high cost problem worldwide, increase production and create a competitive environment, cotton policies should

be re-evaluated, and cotton prices should be determined not by a few countries such as the USA and China, but with the contributions of other producer countries on a global scale. In addition, markets should be freed from the monopoly of genetically modified cotton and scientific studies should be supported to increase the quality of cotton around the world and elite gene pools should be created to obtain high-yield cotton.

Ethics Statement

During the writing process of the study titled "Uzbekistan's Strategic Power in the Context of the Concept of Comparative Advantage: Cotton", scientific, ethical and citation rules were followed, no falsification was made on the collected data, and this study was not sent to any other academic publication environment for evaluation. Since this research was conducted based on document review, there is no obligation for an ethics committee decision.

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Total	11,694	11,718	14,808	17,479	16,703	-4.44%
Country	2019	2020	2021	2022	2023	% Change 22/23
Russian Federation	7,078	7,178	7,093	11,437	10,733	-6%
Poland	1,837	-	1,777	1,669	1,366	-18%
Kazakhstan	199	449	305	427	774	81%
China	160	157	264	116	534	359%
Lithuania	199	400	364	373	512	37%
Kyrgyzstan	68	916	616	465	475	2%
Tajikistan	61	92	206	140	347	147%
Czechia	240	311	316	256	329	28%
Belgium	252	148	537	57	315	448%
Rep. of Korea	612	580	530	403	267	-34%
Italy	124	80	485	248	212	-15%
Ukraine	322	381	328	503	208	-59%
Azerbaijan	57	118	42	113	151	34%
Germany	38	125	244	238	105	-56%
Türkiye	-	-	403	405	98	-76%
Belarus	4	31	43	113	63	-44%
Rep. of Moldova	45	28	105	55	56	2%
Iran	-	-	-	74	42	-43%
Afghanistan	-	2	-	-	40	0%
Latvia	223	214	210	124	21	-83%
Hungary	-	-	0	27	19	-28%
Tunisia	16	57	13	-	14	0%
Spain	-	-	50	159	13	-92%
Armenia	17	21	39	23	11	-53%
Georgia	1	-	3	3	1	-74%
Turkmenistan	-	0	10	0	0	810%
Bulgaria	-	-	0	-	-	0%
Egypt	-	304	442	-	-	0%
Estonia	4	24	-	-	-	0%
Netherlands	-	-	10	-	-	0%
Portugal	-	13	-	-	-	0%
United Arab Emirates	0	-	-	-	-	0%
USA	-	0	-	-	-	0%
Viet Nam	74	48	12	-	-	0%
Lebanon	-	-	53	6	-	-100%
Malaysia	-	-	114	12	-	-100%
Morocco	-	-	29	10	-	-100%
United Kingdom	63	38	166	25	-	-100%

Table 3: Uzbekistan Cotton Fabric Exports (HS Code: 5208, 5209), Metric Tons 7 (Source: UN Comtrade)

