

UDC 677.21:330.3

**FORMATION OF COTTON-TEXTILE CLUSTER
IN THE REPUBLIC OF KAZAKHSTAN: PROBLEMS AND PERSPECTIVES**

**ФОРМИРОВАНИЕ ХЛОПКОТЕКСТИЛЬНОГО КЛАСТЕРА
В РЕСПУБЛИКЕ КАЗАХСТАН: ПРОБЛЕМЫ И ПЕРСПЕКТИВЫ**

G.K. DZHOLDASBAYEVA, A.T. BAKTGEREEVA, M.M. SAURANOVA
Г.К. ДЖОЛДАСБАЕВА, А.Т. БАКТГЕРЕЕВА, М.М. САУРАНОВА

(Almaty Technological University, Republic of Kazakhstan)
(Алматинский технологический университет, Республика Казахстан)
E-mail: alma.taganovna@mail.ru

The article studies the problems of cotton fiber production, development of the textile industry in the republic, the basic prerequisites for the creation and development of a cotton-textile cluster, dynamics of development of cotton production and industrial products. The basic prerequisites for the creation and development of a cotton-textile cluster and factors for increasing the competitiveness of the cotton-textile industry in the republic are presented.

В статье рассматриваются проблемы производства хлопкового волокна, развитие текстильной промышленности в республике, основные предпосылки создания и развития хлопкотекстильного кластера, динамика развития производства хлопка и промышленной продукции. Отражены основные предпосылки создания и развития хлопкотекстильного кластера, представлены факторы повышения конкурентоспособности хлопкотекстильной промышленности республики.

Keywords: cotton, cotton-textile cluster, textile industry, light industry, domestic market of Kazakhstan.

Ключевые слова: хлопок, хлопкотекстильный кластер, легкая промышленность, внутренний рынок Казахстана.

The Republic of Kazakhstan has the necessary prerequisites for applying the cluster approach for the development of the regional economy, these are: rich natural resources, relatively developed legislative base, highly skilled labor potential, steadily developing economy, the availability of business centers, developed financial services market, extensive network of research institutes, universities.

Therefore, based on the above prerequisites, the Government of the Republic of Kazakhstan intends to cluster in three main directions: strengthening the integration of joint enterprises and financial-industrial groups (FIGs) in Kazakhstan into transnational clusters oriented to the external market; creation of new export-oriented clusters in industries that have a great potential for industrial-innovative development; development of inter-industry and technological links for creating clusters oriented to the domestic market [1].

Important distinguishing feature of cotton-textile cluster is factor of innovative orientation. Cotton-textile cluster can be formed under the condition of the implementation of "breakthrough" progress in the field of engineering and production technology and subsequent entry into new "market niches". The world practice shows that the cluster is not only means of achieving goal of the state's economic and industrial policy (structural changes, increasing competitiveness, enhancing innovative focus), it is also powerful tool to stimulate regional development, which may ultimately consist in increasing employment that is important for this southern region of the republic and wages, increasing the overall stability of the economy.

Based on the last direction, there is a need to create a cotton-textile cluster in the South Kazakhstan region, taking into account the peculiarities of inter-branch relations between cotton growing and the textile industry. Need-

ing for create a cotton-textile cluster is justified, first of all, without achieving a full production cycle, using ready-made textile products that reduce the volume of production of the textile and clothing industry by local raw materials with an increase in imports for the processing of yarns and fabrics. Thus, in comparison with 1995, the output of finished products of the industry, in particular hosiery, fell by more than 40 times, and the production of cotton fabrics was discontinued since 1999. Since 2010 the volume of output of industrial products, namely cotton carded and combed increased, from 2015, a decrease has been observed again, cotton fabrics – a gradual decrease in industrial output is observed (Fig. 1 – dynamics of industrial production of cottonwool for 2010-2017).

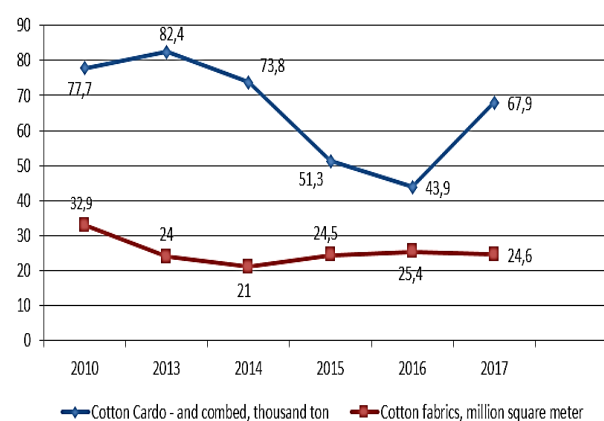


Fig. 1

In spite of the above-mentioned problems of the textile industry development, in the South Kazakhstan region, more than 300 thousand tons of raw cotton are produced annually (Table 1 – main indicators of the development of cotton-growing in 2010-2017). This may well provide the textile industry not only to the specified area, but also to the republic as a whole. At the same time, about 80% of the total volume of these product is exported outside of Kazakhstan.

Table 1

Year	Sown area, thousand hectares	Productivity, centner / ha	Gross yield, thousand tonnes
2010	137,2	17,9	239,8
2011	160,6	21,8	336,0
2012	147,8	26,2	379,6
2013	140,6	28,7	396,7
2014	127,6	25,1	320,7
2015	99,3	27,8	273,9
2016	109,6	26,2	286,7
2017	135,5	24,4	330,5

Thus, the current situation, when applied in excess of raw materials and labor resources in the region, are imported goods of the textile and clothing industry, whose volume is 3...4 times more than the volume of own production, this concerns cheap goods from Uzbekistan and China. This may explain the imperfection of the existing system of taxation, under which exported goods from Kazakhstan are taxed zero, and processed products within the country – full tax rate.

The main prerequisites for the creation and development of cotton-textile cluster are the following: access to raw materials (cotton) - South-Kazakhstan region, Uzbekistan, Turkmenistan, Tajikistan; creation of new and re-equipment of existing textile enterprises; developing infrastructure; the necessary base for the human resources development, R & D; low level of production costs; great demand and proximity to potential markets (China, Asia, Russia, Europe, Middle East). Kazakhstan is surrounded by regions that have a significant demand for cotton yarn. The countries of the Asia-Pacific region need over 16.5 million tons of yarn per year, the countries of Europe - 1.6 million tons, the countries of the CIS - 0.6 million tons, and the countries of the Middle East – about 100,000 tons per year. Kazakhstan with economic returns can export textiles to each of these regions.

Cotton is the raw material base of the cotton-textile industry of the Republic of Kazakhstan. In 2017, the gross harvest of raw cotton in Kazakhstan amounted to 330.5 thousand tons with an average yield of 26.4 c/ha, and the sown area – 135.5 thousand hectares [2]. The cotton grown in Kazakhstan refers to medium-fiber types. Cotton spinning enterprises in the Republic are JSC "Ak Zhip", LLP "Almaty Cotton Plant", LLP "Melange". The share of cotton fabrics in

total production consist from natural and chemical fibers is 78%.

The main fabric manufacturer is LLP Almaty Cotton Plant (Almaty). In 2017, produced 25,405 thousand square meters of cotton fabrics, which is 29.5% lower than production in the corresponding period of 2010 [3]. The industry economic crisis led to the cessation of the enterprises` functioning that were finishing the fabrics. Nevertheless, with the development of the cotton fabric production, the problem of restoring this segment of the cotton textile industry of the country will again become actual. In the near future it is planned to introduce equipment for finishing fabrics at textile enterprises of the South Kazakhstan region.

As soon as possible, the textile industry of Kazakhstan should concentrate on promoting and improving the spinning process of cotton fiber. This is because cotton yarn is a product with higher added value than cotton fiber, and very high demand for yarn in many major world markets. There is a great potential for exporting yarn to markets, especially to China, the EU and Russia.

In order to increase the competitiveness of this segment, it is necessary to establish the production of various types of yarn, oriented to export and improve the quality of products, aligning with international standards and developing technologies for combined yarns.

In order to increase the competitiveness of fabric production for Kazakhstan necessary a consistent mastering of industrial chain "from harsh types of fabrics to services in the sphere of fabric production and off-the-shelf items production", taking into account the dynamics of demand development in the domestic market and foreign markets.

Kazakhstan textile enterprises should concentrate on the following factors that can en-

sure the increase of competitiveness: increase of labor productivity in textile factories; improvement of marketing; establishment and access to logistics chains; improvement of the quality standards of production processes; establishment of a business climate.

Based on study of the formation mechanism and functioning of territorial-sectoral clusters, we concluded: the effectiveness of the created cluster will depend on the development level of inter-sectoral relations, interaction forms between enterprises in this association, mutually beneficial economic relations between partners. It is necessary to take into account the specific features, as well as the existing resource, labor, financial potential of each industry [4], [5].

As a result, we have identified the main factors determining the choice of the interaction way between enterprises in the formation of the territorial-industrial cluster: interests of participants, technological connectivity level of enterprises, specialization of enterprises for production, number of technological actors, market competitiveness for agricultural products, organizational and legal principles of interaction

Thus, the cluster form of production organization in the cotton-textile industry will strengthen horizontal ties between enterprises and create the basis for successful mutually beneficial cooperation of all entities aimed at producing high-quality products with high added durability. The cluster approach offers advantages for the development of both large

enterprises and multitude of small enterprises, in particular many farms engaged in the production of raw cotton.

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Рекомендована Ученым советом. Поступила 02.10.18.