

УДК 677.21:330.3

**РАЗВИТИЕ ХЛОПКОВО-ТЕКСТИЛЬНОЙ ПРОМЫШЛЕННОСТИ  
В РЕСПУБЛИКЕ КАЗАХСТАН**

**COTTON-TEXTILE INDUSTRY DEVELOPMENT  
IN THE REPUBLIC OF KAZAKHSTAN**

*Г.К. ДЖОЛДАСБАЕВА, А.Т. БАКТГЕРЕЕВА, М.М. САУРАНОВА, А.Р. УРКУМБАЕВА*  
*G.K. DZHOLDASBAEVA, A.T. BAKTGEREEVA, M.M. SAURANOVA, A.R. URKUMBAYEVA*

(Алматинский технологический университет, Республика Казахстан)

(Almaty Technological University, Republic of Kazakhstan)

E-mail: alma.taganovna@mail.ru

*С переходом к рыночной экономике текстильная промышленность всех постсоветских стран оказалась в тяжелом положении. Не стал исключением и Казахстан, появились конкуренты из Китая, Турции и среднеазиатских республик, поставивших под угрозу существование отечественного производства тканей. Ключевыми факторами, определяющими конкурентоспособность предприятий текстильной промышленности, являются в первую очередь наличие сырья и его стоимость. В статье рассматривается развитие хлопково-текстильной промышленности в республике. Анализируется динамика развития производства хлопка-сырца и легкой промышленности. Рассмотрены факторы, способные обеспечить повышение конкурентоспособности текстильных предприятий.*

*With the transition to a market economy, the textile industry of all post-Soviet countries was in a difficult situation. Kazakhstan was no exception, and there were competitors from China, Turkey and the Central Asian republics that threatened the existence of domestic fabric production. The key factors determining the competitiveness of textile enterprises are, first of all, the availability of raw materials and their cost. The article discusses the development of the cotton and textile industry in the republic. The dynamics of development of production of raw cotton and light industry. Factors that can provide increased competitiveness of textile enterprises are considered.*

**Ключевые слова: хлопок, производство, текстильная промышленность, мощность, отрасль, индустрия.**

**Keywords: cotton, production, textile industry, power, industry.**

Textile and light industry is one of the main sectors of the economy that form the budget in many countries of the world. The raw material base of the cotton and textile industry in Kazakhstan is cotton. Over the past 10 years, the production of raw cotton increased by 27,3% and in 2019 the gross harvest of raw cotton in the country amounted to 343,6 thousand tons, the yield for this period increased by 32,1% [1].

The resource supply of the cotton-textile industry of the republic is determined by such components as favorable environmental and climatic conditions for cotton cultivation and professional skills of the local population, irrigated arable land, production capacities of cotton-processing organizations and textile-sewing enterprises, and developed business infrastructure. Thanks to this, the current state of the industry is characterized by positive trends: internal volumes are growing. Consumption of cotton fiber, the range of finished textile and garment products is being restored and expanded, integration processes of cotton and textile industries are taking place.

The state of production of textile products for the period from 2014 to 2018 present ed in table 1 (Production of textile products for 2014-2018 in the Republic of Kazakhstan).

From the table it follows that for 2014-2018 in the republic, there is an increase in the production of carded and combed cotton by 109,9%, fabric production increased by 147,5, and in the Kostanai region during this period it increased 2,2 times, in Pavlodar region by 170,3%. Cotton fabrics in 2018 amounted to 24,3 million m<sup>2</sup>, an increase of 181,3% [2].

The cotton obtained in Kazakhstan belongs to the medium-fiber types of cotton fiber. Most of the produced cotton fiber (80%) is export-oriented.

Figure 1 (The volume of production in current prices, billion tenge) shows the volume of production in current prices for the period from 2010 to 2018, billion tenge. From the figure it follows that over this period there have been changes in the direction of increase stably in all types of industries.

Table 1

Name	2014 y.	2015 y.	2016 y.	2017 y.	2018 y.	2018 to 2014,%
Cotton, carded and combed, tons	62899	51337	53751	66882	69138	109,9
Cotton yarn and sewing threads, tons	7805	10805	5967	4142	...	...
Turkestan region	-	-	-	30	...	...
Shymkent	7805	10805	5967	4112	...	...
Fabrics, thousand m <sup>2</sup>	41279,7	48555,0	57791,6	55873,2	60906,2	147,5
Almaty region	180,3	37,2	-	82,7	31,6	17,2
Atyrau region	-	-	118,1	22,6	-	-
Zhambyl region	28	474	8	-	-	-
Kostanay region	415	406	-	949	935	в 2,2 р.
Pavlodar region	19714,9	22467,0	29783,5	29141,0	33572,0	170,3
East Kazakhstan region	-	-	-	0,6	0,6	-
Almaty city	334,6	30,8	-	0,3	-	-
Cotton fabrics, thousand m <sup>2</sup>	21033,3	24541,0	25405,0	24617,9	24268,6	115,4
Fabrics from artificial and staple fibers, thousand m <sup>2</sup>	20049,5	22535,0	31585,5	30909,1	36347,0	181,3
Pile fabrics, terry fabrics and other special fabrics, thousand m <sup>2</sup>	168,9	1005,0	675,0	323,0	...	...

The number of operating light industry enterprises as of 01.01.2018 amounted to 933, the main share (58%) of which was occupied by

sewing enterprises, since the creation and organization of production of clothes required less investment than the creation of textile and

leather-footwear industries. Textile enterprises account for 31% of enterprises. A rather large number of small enterprises are operating in this industry, and in terms of ownership are mainly private.

Half of the large enterprises of light industry are located in the South Kazakhstan region of the republic. This is primarily due to the proximity of raw materials markets and the availability of labor resources, providing high employment for the able-bodied population, in particular for women. In 2018, in the regional context, the main manufacturers of light industry were the following enterprises: in the South Kazakhstan region - JSC "Melange", JSC "Utex", "Azala Textile" LLP, "Bal Textile" LLP; Almaty city - "Kazlegprom-Almaty" LLP, "Kazakhstan Texti-Line" - Mimioriki LLP; Almaty region - "Glasman" LLP, "Universal" LLP [2].

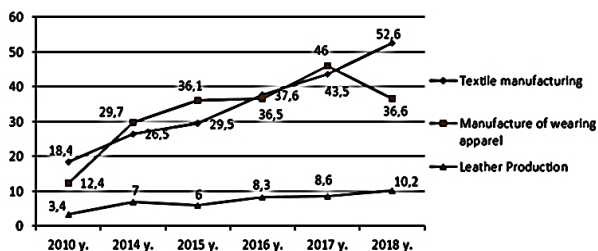


Fig. 1

Several new enterprises are working in the South Kazakhstan region of the republic, investing in the modernization of existing and construction of new textile industries. Utex JSC is a cotton fiber processing company whose planned capacity is 6 thousand tons / year of cotton yarn, which is sold to Russia, Ukraine and the local market. JSC "Melange" is an integrated factory producing cotton yarn using local raw materials. The production capacity of the enterprise is on average 5 thousand tons / year, and the enterprise also produces home textiles. "Nimex Textile" LLP is a textile factory processing 12 thousand tons / year of cotton fiber [3].

Thus, today the proportion of textile and clothing industry in the total gross production of the country is 0,4%. The textile and clothing industry of Kazakhstan covers only 10% of the domestic market demand. While for the formation of the economic security of the country,

the volume of domestic production should at least satisfy 30% of domestic demand.

The textile industry of the republic is characterized by the fact that it is represented by enterprises built before the republic entered the market, as a result, it is a low level of their technical equipment, low labor productivity, backwardness from world analogues of technology, lack of quality standards, low level of marketing. But there are competitive advantages - the proximity of potential cotton producers - Uzbekistan, Tajikistan, Turkmenistan. Kazakhstan is at the center of the capacious sales markets of the CIS countries and Eastern Europe. Another advantage is the compact arrangement of raw materials and processing plants. This allows you to apply a cluster model of industry development.

The main problem of all enterprises engaged in the production of finished fabrics and clothing is the lack of interaction with local suppliers of raw materials. This justifies the need to use the cluster method for combining industry enterprises, interconnected into a single technological chain for the deep processing of cotton.

The republic is surrounded by regions with 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 former USSR – 0,6 million tons, and the countries of the Middle East - about 100 thousand tons per year. Kazakhstan, with economic returns, can export textiles to each of these regions.

In the near future, Kazakhstan's textile industry should concentrate on promoting and improving the cotton-fiber spinning process. This is due to the fact that cotton yarn is a product with a higher added value than cotton fiber, as well as a very high demand for yarn in many major world markets.

In order to increase the competitiveness of this segment, it is necessary to organize the production of various types of yarn, export-oriented and improving product quality, bringing it into line with international standards and developing technologies for combined yarn.

The revival of the domestic textile industry for Kazakhstan has potentially not only great

economic, but also a noticeable social effect. This sphere of production traditionally creates a large number of jobs, in addition, it stimulates the development of a number of areas in agriculture (cotton and wool production) and can help revive socially depressed regions [4].

To increase the competitiveness of fabric production, Kazakhstan needs a consistent development of the production chain "from harsh types of fabrics to services in the field of fabric production and the manufacture of finished products", taking into account the dynamics of demand in the domestic and foreign markets.

Kazakhstan's textile enterprises should focus on the following factors that can increase competitiveness: increasing labor productivity in textile mills; improving marketing; establishment and access to supply chains; improving the quality standards of production processes; establishing a business climate.

At the initial stage of development of the textile industry (as a group of light industry sectors) through cluster development, it is proposed to limit oneself to the segment of production of cotton yarn and fabric. This industry is by far the most competitive with other sectors of the textile industry. Moreover, its development helps to restore the value chain of the cotton-textile segment of the textile industry. In Kazakhstan, the production of raw cotton is growing, which is exported in large volumes, there are also sewing companies that can produce various products for the domestic and foreign markets.

Creating a competitive textile segment will allow processing cotton produced in Kazakhstan, increasing added value and producing the necessary products for further processing at the sewing enterprises.

The Republic has a good scale of market opportunities, both for the development of the textile industry, and for a single sector of the cotton and textile industry in the region. For the systematic implementation of the creation and development of the cotton-textile cluster in the southern region of Kazakhstan, measures have already been taken at the state level. In particular, the Law of the Republic of Kazakhstan "On the Development of the Cotton Industry" [5] was adopted, modern laboratories for

the cotton-fiber quality assessment of cotton fiber are being created, a cotton research and development institute is functioning, and work is underway to organize transport and logistics centers.

Thus, there are many directions in the republic for the development of domestic production of the cotton and textile industry, the products of which, first of all, should be focused on increasing the competitiveness of domestic products and import substitution on the domestic market. State support for industries, both organizational and financial, is carried out quite extensively. The revival of the domestic cotton and textile industry for Kazakhstan has potentially not only economic, but also a significant social effect. This sphere of production traditionally creates a large number of jobs, in addition, it stimulates the development of a number of areas of agriculture (cotton production) and can help revive socially depressed regions.

#### REFERENCES

1. Statistics of agriculture, forestry, hunting and fisheries. Ministry of National Economy of the Republic of Kazakhstan. Committee on Statistics – Access mode: <http://stat.gov.kz//official/industry/14/statistic/6>. [Electronic resource]. Date of application – 13.11.2019
2. *Kulanova D.A., Abdikerimova G.I., Umbitaliev A.D.* Trends in the development of the textile industry of the South Kazakhstan region. - International Economic Forum, 2014. <http://be5.biz/ekonomika1/r2014/1936.htm>. [Electronic resource]. Date of application – 13.11.2019
3. Official statistical information. Industry. Ministry of National Economy of the Republic of Kazakhstan. Committee on Statistics. – Access mode: - <http://stat.gov.kz //official/industry/14/statistic/5>. [Electronic resource]. Date of application – 13.11.2019
4. *Azhimetova G.N.* Kazakhstan textile market. Economic sciences / 9. Economy of industry. Kazakh National Pedagogical University named after Abay, Republic of Kazakhstan [http://rusnauka.com/27\\_NII\\_2010/Economics/71033.doc.htm](http://rusnauka.com/27_NII_2010/Economics/71033.doc.htm). [Electronic resource]. Date of application – 13.11.2019
5. Law of the Republic of Kazakhstan dated July 21, 2007 N298-III Law of the Republic of Kazakhstan "On the development of the cotton industry" <https://pavlodar.com/zakon/info.html?dok=03707>. [Electronic resource]. Date of application – 13.11.2019

Рекомендована отделом организации научной работы АТУ. Поступила 01.04.19.