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**COMPARATIVE ANALYSIS OF THE MARKET
OF THE LEADING COUNTRIES OF THE WORLD AND KAZAKHSTAN
FOR THE PRODUCTION OF TEXTILE MATERIALS
USED IN THE SHOE INDUSTRY**

**СРАВНИТЕЛЬНЫЙ АНАЛИЗ
РЫНКА ВЕДУЩИХ СТРАН МИРА И КАЗАХСТАНА
ПО ПРОИЗВОДСТВУ ТЕКСТИЛЬНЫХ МАТЕРИАЛОВ,
ИСПОЛЪЗУЕМЫХ В ОБУВНОЙ ПРОМЫШЛЕННОСТИ**

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The article examines the current state of the light and textile industry of the Republic of Kazakhstan and provides analyses of the produced products. World practice shows that light industry has the highest possible turnover of capital, respectively, the products produced belong to the goods of necessity after food, the demand for it is unlimited. In recent years, the demand for fabrics of improved consumer properties and fashionable design has increased, which has affected the volume of production. In the industry, there is a decline in the use of domestic textile materials for shoes, which is accompanied by import substitution from developed countries. Kazakhstan is a leader in the export of high-quality raw cotton materials. All processed materials are imported to Kazakhstan from other countries, which negatively

affects the competitiveness of the products, which determines the relevance of scientific research. Based on the results of a marketing study on the production of shoes in, the ways of development of the shoe industry in the Republic of Kazakhstan are proposed.

В статье рассматривается современное состояние отрасли легкой и текстильной промышленности Республики Казахстан, и приводится анализ выпускаемой продукции. Мировая практика показывает, что легкая промышленность имеет максимально высокую оборачиваемость капитала, соответственно выпускаемая продукция относится к товарам первой необходимости после продуктов питания, и спрос на нее неограничен. В последние годы увеличился спрос на ткани улучшенных потребительских свойств и модного дизайна, который повлиял на объемы производства продукции. В отрасли отмечается спад использования отечественных текстильных материалов для обуви, который сопровождается импортозамещением из развитых стран мира. Казахстан лидирует по экспорту качественных необработанных хлопчатобумажных материалов. Все обработанные материалы импортируются в Казахстан из других стран, что отрицательно сказывается на конкурентоспособности выпускаемой продукции. Все это определяет актуальность научного исследования. На основе результатов маркетингового исследования по производству обуви предложены пути развития обувной промышленности в Республике Казахстан.

Keywords: light industry, textile industry, footwear, textile materials, import, export, competitiveness, import substitution.

Ключевые слова: легкая промышленность, текстильная промышленность, обувь, текстильные материалы, импорт, экспорт, конкурентоспособность, импортозамещение.

Introduction

The light industry is one of the socially significant industries that can provide the population with high employment and have the opportunity to develop the economy during the next wave of crisis, falling oil prices, and declining mineral reserves [1], [2].

World practice shows that the turnover of capital in the market of textile and light industries is very high, and the products produced belong to basic necessities and demand is not limited. In foreign countries, much attention is paid to the development of light industry in Belarus, Turkey, Uzbekistan, and a number of measures are aimed at the development of the cotton, textile, garment-knitwear, leather-fur and shoe industries. The textile industry forms the main material situation between people, i.e. the establishment of close contacts with the consumer, the dynamics of the industry, which is determined by the intensive transition of the

range of products produced due to the change of mode, changes in tastes and requirements for raw materials, semi-finished products [3...5].

In recent years, market conditions have changed, and the demand for improving the design and consumer properties of fabrics has increased. In Kazakhstan, the share of this industry in the range of products is very low. At the same time, this demand affected the volume of output [6...8].

Experimental part

The fact that in Kazakhstan there is no production of shoe textile materials and consumer textile shoe products, the import of materials necessary for the production of shoes from fully developed foreign countries is becoming relevant. Approximately 98% of all products of the market are imported from China, Turkey, Russia, and Belarus [9...13].

The shoe industry is an ever-growing sector in the global economy. At the present stage, textile materials along with natural leather are increasingly used in the manufacture of shoes, which is much cheaper. The leader in the production of shoes has moved from the former leaders of China and other Asian countries – India, Vietnam, Indonesia, Italy and the United States [14].

At the beginning of 2017 was announced the strategic plan until 2025, sets tasks for accelerated qualitative economic growth and improving the standard of living in the country. The government is already faced with the task of increasing non-primary exports by 2 times by 2025 [15], [16]. Approved roadmap for the development of light industry for 2019-2021, designed to develop the "Economy of Simple Things", and aimed at supporting and developing industrial enterprises, primarily light industry [17]. In the light industry of Kazakhstan, only raw materials are exported. And the import of finished products exceeds the export of raw materials by 3 times. The Republic of Kazakhstan is an agrarian country and should have provided light industry with sufficient domestic raw materials. All domestic suppliers of raw materials transferred their goods to the markets of China and Turkey [18].

Result and discussion

In Kazakhstan, the main suppliers of light industry goods are China, Turkey, and Russia. However, Kazakhstan has the opportunity to produce textile materials for the production of shoes – at the LLP AZALA Textile. Due to the high quality of the products, the plant is not only one of the leaders of the light industry of Kazakhstan, but also has established itself as an international producer of cotton products of the highest level, exported to Lithuania, Latvia, Germany, Italy, Poland, as well as neighboring countries.

In 2010, a program for the development of light industry in the Republic of Kazakhstan for 2010-2014 was developed, which aimed at developing the production of competitive consumer goods with high quality and a wide range of light industry products. [19]. After this program, an increase in industrial production in light industry was achieved. However, at the moment there is a negative

balance of the foreign trade balance of light industry goods. This reflects the foreign trade shortage of these goods [20].

There are favorable conditions for the further development of light industry in Kazakhstan. Kazakhstan is close to raw material-producing regions such as Turkmenistan, Uzbekistan, and Tajikistan. At the same time, Kazakhstan is close to potential markets for light industry products, such as Russia, Asia and Europe. The regions where cotton is grown have labor resources, which provides a significant resource potential for the development of light industry [21], [22].

World light industry is characterized by stable economic growth associated with population growth, increasing its well-being and purchasing power, and accordingly (Figure 1) light industry products are rapidly developing on the world market. Consumption of textile products is steadily increasing by 2-4% per year, shoes-by 3-4% [23], [24].

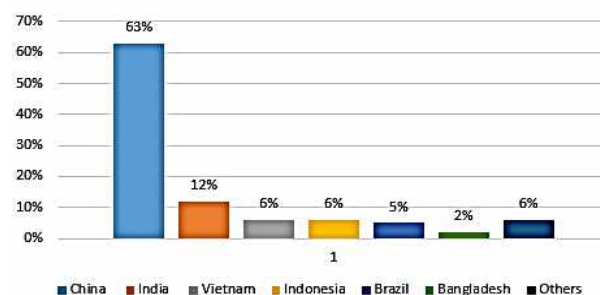


Fig. 1

All manufactured shoes are classified according to different characteristics, namely: by purpose; by gender and age; by fastening methods [25...28]. Production in the shoe industry includes the entire process from cutting materials to assembling and finishing shoes. Along with a detailed specialization, shoes are produced that are characterized by a specific feature (materials used for the top and bottom of the shoe, purpose, method of fastening). Today, the leather and shoe segment of the light industry of Kazakhstan is represented by more than 160 enterprises, 56 of which produce shoes [29].

According to the Association of light industry enterprises of the RK, today Kazakhstan's domestic demand for shoes is provided

only by 1-2% at the expense of domestic production. The main part of the market is represented by imported products imported from China, Turkey, Russia and Belarus [30...33].

In 2018, the volume of production of shoes, except for sports, protective and orthopedic ones, amounted to 1,084 thousand pairs, and in the same period a year earlier-1,229.8 thousand pairs [34].

In 2018 and 2017, the main volume of production in Almaty amounted to 479.6 thousand pairs and 566.3 thousand pairs, respectively, but in 2016, the leader in production was the South Kazakhstan region. In 2017, shoe exports in monetary terms decreased by 2 times compared to the level of 2016 (from 15.6 to 8 million). This is due to the export of cheap shoes, because during this period, exports increased on the contrary (from 2,6 to 3,3 million pairs). In 2018, exports increased by 2% compared to 2017 and amounted to 8.2 million US dollars. In 2018, exports in kind decreased by more than 2 times compared to the previous year due to the fact that more expensive shoes were exported than a year ago [35].

Figure 2 shows a decrease in the number of pairs of shoes exported from Kazakhstan. Figure 5 shows that more than half of all exported shoes were made of natural leather, followed by rubber or plastic shoes, which accounted for 58%, and textile shoes-8%.

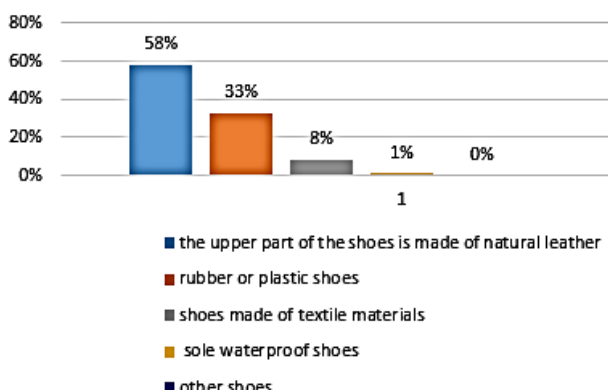


Fig. 2

Fig. 3 shows the level of shoe consumption in developed countries and Kazakhstan. In Kazakhstan, the average consumption of shoes per person is 2 pairs respectively in the USA

with an average of 7 pairs per person per year [35].

Experts say that by 2020, the volume of the global shoe market will reach more than 22 billion pairs of shoes were produced world-wide. Most of the shoes, about 40%, are sold in Europe, followed by China and the United States. This is followed by India, Brazil, Vietnam and Indonesia [36...40].

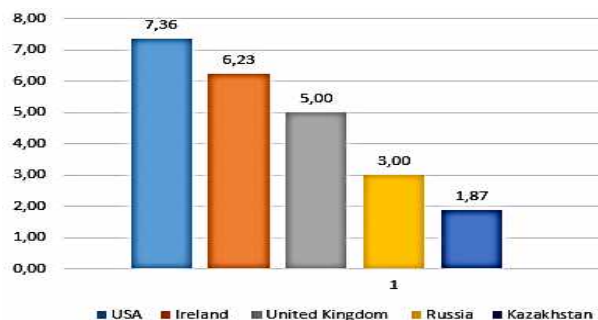


Fig. 3

Conclusion

Kazakhstan has potential for growth of shoe market. In order to own their own brand and compete with imported shoes, Kazakhstan companies need to pay attention to the quality of manufactured products, actively support their brand with advertising, and improve the quality of customer service. The state provides support to domestic enterprises of the industry.

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