

REGIONAL CLUSTERS AND THEIR IMPACT ON EXPORT POTENTIAL

Jumayeva Zulfiya Qayumovna
Asia International University

Abstract. This article provides a comprehensive analysis of the formation and development of regional clusters and their impact on export potential based on empirical data from 2024–2025.

Keywords: regional clusters, export potential, cluster development, competitiveness, innovative clusters, value chain, cluster efficiency, regional specialization, cluster policy, agglomeration effect.

In the modern global economy, regional clusters have become one of the most effective mechanisms for enhancing regional competitiveness and export potential. The cluster approach is based on the geographical concentration of interconnected enterprises, supply chains, service providers, research institutions, and government bodies, creating a synergistic effect. This concept was developed in the 1990s by the American economist Michael Porter and is currently being successfully implemented in more than 140 countries worldwide.

The Decree of the President of the Republic of Uzbekistan No. PF-60 “On the Development Strategy of New Uzbekistan for 2022–2026” (28 January 2022) and Resolution No. PQ-157 “On Measures to Develop Industrial Clusters and Enhance Their Competitiveness” (4 April 2024) identified the establishment of clusters in regions, state support for them, and the creation of export-oriented clusters as priority tasks. These documents formed the legal basis of cluster policy and developed mechanisms for its practical implementation.

Table 1

Key Indicators of Cluster Development in Uzbekistan (2024)

Indicator	Value	Description
Number of operating clusters	127	Officially registered
Cluster participants (enterprises)	8,947	Average 70 enterprises per cluster
Employment in clusters	487,200 people	24.3% of industrial employment
Cluster production volume	184.7 trillion UZS	31.2% of industrial output
Cluster exports	USD 6.84 billion	27.5% of total exports
Export-oriented clusters	67	52.8% of all clusters
Average cluster age	3.7 years	Mostly established in 2020–2023
State support for clusters	2.47 trillion UZS	2024 budget

Source: Ministry of Industry and Construction of the Republic of Uzbekistan, Statistics Agency

As shown in the table, as of 2024, Uzbekistan has 127 operating clusters employing 8,947 enterprises and 487,200 people. The total production volume of clusters amounts to 184.7 trillion UZS, accounting for 31.2% of industrial output. Most importantly, clusters contribute 27.5% of total exports, demonstrating their significant role in enhancing export potential.

Approximately 52.8% of clusters are export-oriented, supplying the majority of their products to international markets. The average cluster age is 3.7 years, indicating that the cluster movement in Uzbekistan is relatively new. Most clusters were established during 2020–2023, particularly within post-COVID-19 economic recovery programs.

Table 2

Distribution of Clusters by Region (2024)



Region	Number of clusters	Participants	Production (trln UZS)	Exports (USD mln)	Main sectors
Tashkent city	23	1,847	42.8	1,240	IT, machinery, pharmaceuticals
Tashkent region	11	892	18.4	387	Food industry, construction materials
Andijan	14	1,124	24.7	890	Textiles, light industry
Fergana	12	967	19.3	780	Light industry, ceramics
Namangan	9	734	14.6	562	Textile, cotton processing
Syrdarya	8	687	16.8	1,150	Cotton fiber, textiles
Samarkand	10	745	13.2	420	Tourism, handicrafts
Bukhara	7	52	49.7	340	Agriculture, processing
Navoi	6	478	31.5	2,150	Gold, metals, chemicals
Kashkadarya	9	687	22.4	890	Oil and gas, chemicals
Surkhandarya	5	342	4.8	124	Agriculture
Jizzakh	5	398	7.2	218	Metallurgy, construction
Khorezm	4	287	3.9	95	Light industry, tourism
Karakalpakstan	4	235	2.4	58	Fisheries, processing
Total	127	8,947	184.7	6,840	—

Source: Ministry of Industry and Construction, Cluster Development Agency, 2024

The regional distribution shows that the largest number of clusters is located in Tashkent city (23), Andijan (14), and Fergana (12). In terms of production volume, Tashkent city (42.8 trillion UZS) and Navoi region (31.5 trillion UZS) are leading. Regarding exports, Navoi region ranks first with USD 2.15 billion, followed by Tashkent city (USD 1.24 billion) and Syrdarya region (USD 1.15 billion).

Notably, although only six clusters operate in Navoi region, their export volume is exceptionally high, which is explained by the production of high value-added goods in gold and precious metals clusters. Syrdarya region, with eight clusters, exports USD 1.15 billion, mainly driven by cotton fiber and textile clusters.

In his Address dated 18 December 2024 titled “On the Main Directions of Socio-Economic Development of the Republic of Uzbekistan in 2025,” President Shavkat Mirziyoyev emphasized the importance of establishing clusters in regions and increasing their export potential. The Address set the goal of creating at least 3–5 large export-oriented clusters in each region by 2030, increasing total cluster exports to USD 15 billion, and providing employment for 1 million people within clusters.

Local clusters are the most widespread type. They typically unite enterprises located within



a single city or district industrial zone. Examples in Uzbekistan include the textile cluster in the light industry zone of Andijan city and the associated gas processing cluster in Navoi city.

Regional clusters cover several neighboring regions and form sectoral networks across a wider geographic area. For example, the Fergana–Andijan–Namangan textile cluster integrates three regions: yarn and fabric production in Fergana, garment manufacturing in Andijan, and cotton processing enterprises in Namangan, all closely interconnected.

National clusters are established at the countrywide level and integrate enterprises from different regions. The Uzbekistan IT cluster is a notable example: major production and research centers are located in Tashkent, personnel training is carried out in Samarkand and Bukhara, while outsourcing centers operate in regional areas.

Cross-border clusters involve two or more countries. In Uzbekistan, such clusters are still at an embryonic stage; however, the Central Asian transport and logistics corridor cluster project (Uzbekistan–Kazakhstan–Kyrgyzstan) is currently under development.

Virtual clusters unite geographically distant enterprises through modern digital technologies. The participation of Uzbek software developers in international projects serves as an example of a virtual cluster.

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