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THE CLOTHING INDUSTRY IN KAZAKHSTAN: CURRENT STATE, CHALLENGES AND DEVELOPMENT PROSPECTS

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ABSTRACT

The purpose of the study is to comprehensively assess the state of the clothing industry based on the analysis of key production, investment and market indicators, as well as to identify the main limitations and prospects for its development. *The methodological basis* of the research consists of economic and statistical analysis methods, comparative and structural analysis, as well as methods of quantitative data generalization and interpretation. The work uses official statistics, including data on investments, production volumes, retail trade, as well as natural indicators of output.

The uniqueness of the study lies in conducting a comprehensive analysis of the clothing industry in Kazakhstan, while taking into account cost and in-kind indicators, which revealed structural imbalances between investment activity, production and consumption. In contrast to existing research, the focus is on comparing the dynamics of different segments of the industry and identifying the causes of their uneven development.

The results show that, despite significant investment growth and expansion of the retail market, the clothing industry is characterized by a low share in the industrial structure, high dependence on imports and unstable production dynamics. The gap between the growing demand and limited domestic production capabilities has been identified. Based on the analysis, the key directions of the industry's development are substantiated, including the formation of a full production cycle, technological modernization, development of cooperation, increasing product competitiveness and expanding export potential.

Keywords: clothing industry, garment industry, clothing production, clothing industry indicators, clothing market, economy of Kazakhstan

INTRODUCTION

The clothing (garment) industry in Kazakhstan is an important part of the light industry and plays a significant role in providing the domestic market with consumer goods. Despite the availability of a raw material base and historical production experience, the industry faces a number of structural problems that slow down its development. At the same time, the current economic conditions and changes in consumer behavior create new opportunities for growth.

One of the key features of Kazakhstan's clothing industry is its high dependence on imports. A significant part of the fabrics, accessories and ready-to-wear comes from abroad, primarily from China, Turkey and European countries. At the same time, Kazakhstan has its own raw material potential, in particular cotton, but insufficient processing within the country leads to the fact that raw materials are exported, and finished products are imported back with higher added value.

Historically, during the Soviet period, Kazakhstan had a developed textile and clothing base with a full production cycle. However, in the 1990s, there was a sharp decline: many enterprises closed, production chains were destroyed, and the market was filled with imported products. In the following years, a gradual recovery of the industry began, mainly at the expense of small and medium-sized businesses, but structural problems remain to this day.

Among the main obstacles to the development of the industry are the low competitiveness of domestic products compared to imports, a shortage of qualified personnel, technological backwardness and limited

access to high-quality materials. The shadow economy also plays a significant role, distorting market competition and reducing the effectiveness of government support. At the same time, positive changes have been observed in recent years. The segment of local brands focused on unique design, national identity and flexible production is actively developing. Such companies are more likely to use small batches, adapt quickly to changes in demand, and work directly with consumers through digital sales channels. The development of e-commerce has become one of the key growth drivers. Online platforms allow manufacturers to enter the market without significant investments in retail infrastructure, expand their sales geography, and respond more quickly to consumer preferences. This is especially important for young brands and small industries. An additional development factor may be the formation of textile clusters aimed at creating a full production cycle within the country, from processing raw materials to the production of finished products. The implementation of such projects will reduce dependence on imports, increase value added and create new jobs.

LITERATURE REVIEW

The development of the clothing industry is an object of study in both the world and domestic scientific literature. The research covers a wide range of issues, from global production chains to the specifics of the industry's functioning in different countries, including Kazakhstan. In general, the analysis of publications shows that the key areas of research are issues of competitiveness, supply chain management, increasing value added and adapting the industry to the conditions of globalization.

In the world literature, considerable attention is paid to the concept of Supply Chain Management. One of the leading researchers in this field is Christopher M. [1], who considers supply chains as a key factor in the competitiveness of companies. His work highlights the need for flexibility, responsiveness, and integration of all participants in the chain. These ideas are developed in the research of Choi [2], which emphasizes that supply management in the textile industry requires the integration of production, logistics and sales processes. An important contribution to the study of global production networks was made by Gereffi G., Humphrey J., Sturgeon T. [3], who developed the theory of global value chains (GVC). According to this concept, countries can occupy different positions in the international division of labor, from suppliers of raw materials to manufacturers of finished products and brand owners. Within the framework of this theory, it is shown that emerging economies tend to occupy the lower chain links, specializing in the supply of raw materials or performing labor-intensive operations. This situation is also typical for Kazakhstan, which is confirmed by domestic research.

A separate area of modern literature is related to the sustainability and responsibility of supply chains. Thus, Shen *et al.* [4] note that sustainable development is becoming a key factor in the competitiveness of textile companies, including environmental and social aspects. In turn, Köksal *et al*. [5] emphasize the importance of implementing the principles of social responsibility in supply management, which is especially important in the context of global production outsourcing. The issues of choosing suppliers and optimizing interaction with them are discussed in the work of Tong *et al.* [6], which proposes models for evaluating suppliers based on sustainability and efficiency criteria. These approaches are complemented by research on supply chain transparency (Madumali *et al.*, 2023) [7], which highlights the role of digital technologies and information openness in increasing trust and efficiency of interaction between chain participants. The regional specifics of supply chain management are analyzed in a study by Lam on the experience of Hong Kong as one of the world centers of the textile industry [8]. The author shows that competitiveness is achieved through high flexibility, advanced logistics, and close integration with global markets. These findings are of practical importance for countries with economies in transition.

Reports from the World Bank and McKinsey & Company note that the modern clothing industry is developing under the influence of trends such as digitalization, automation of production and the spread of the Fast Fashion model. These processes require companies to be highly flexible and able to quickly adapt to changes in demand [9; 10].

Domestic studies have primarily examined the current condition, structural constraints, and development prospects of Kazakhstan’s light industry. Mukhan, Yessirkepova, Tulemetova *et al.* emphasize the need to identify priority directions for developing the domestic light industry market, taking into account institutional and market-related barriers [11]. Okay, Yessirkepkova, and Durru analyze the transformation of institutional

support for Kazakhstan's textile industry and underline the importance of improving the effectiveness of state mechanisms supporting textile enterprises [12]. Joldasbekova focuses on the development strategy of Kazakhstan's light industry and proposes measures aimed at increasing the effectiveness and competitiveness of the sector [13]. Collectively, these studies highlight the importance of strengthening domestic production capacities, improving institutional support, developing textile processing, and increasing the competitiveness of local manufacturers. The problems of competitiveness and technological lag are analyzed in the research of Nurmagambetova A., *et al*, which emphasized the need to modernize enterprises and introduce innovative technologies [14]. In turn, Baineeva, P., *et al* and Yeshzhanov, A. focused on the insufficient development of domestic processing of raw materials, which limits the growth of added value in the industry [15]. The issues of formation of efficient production chains and cluster development are discussed in the publications of the Ministry of Industry and Infrastructure Development of the Republic of Kazakhstan [16]. These works emphasize the importance of creating textile clusters that will combine the production of raw materials, fabrics and finished products within a single system.

A comparative analysis of the world and domestic literature shows that, despite the differences in the scale and level of development of the industry, the key problems and research areas largely coincide. These include improving the efficiency of supply chain management, developing domestic production, increasing value added, and adapting to global trends. Thus, international experience shows the importance of integration into global production chains and the development of high-tech segments of the industry, while domestic research highlights the need to overcome structural constraints and form a stable base for the development of the garment industry in Kazakhstan.

MAIN PART

In our article, we aim to analyze and evaluate the current state of the clothing industry development in Kazakhstan, identify problems and propose solutions to them. To assess the level of development of the clothing industry, such indicators as the share of the industry in total industrial production and the number of operating enterprises are considered. The first indicator reflects the industry's contribution to the industrial structure of the economy, while the second indicator reflects the scale and level of business activity in the sector. Taken together, they make it possible to assess not only the dynamics of development, but also the structural position of the clothing industry in the national economy. The share of the garment industry in the total volume of industrial output in the period under review remains extremely low and ranges from 0.1–0.2%. In 2020, this figure was 0.2%, reflecting the industry's limited contribution to the country's industrial economy. Already in 2021, the share decreased to 0.1%, that is, it decreased by 50%. Such a sharp decline may be due to the effects of the COVID-19 pandemic, a reduction in domestic production, as well as faster growth in other industries, primarily the raw materials sector. In 2022, the indicator remained at the level of 0.1%, which indicates the absence of structural changes and the continued weak position of the clothing industry in the economy. In 2023, the share increased to 0.2%, which means an increase of 100% compared to the previous year. This may be due to an increase in clothing production, increased investment, and a partial recovery in the industry. In 2024, the indicator remained at 0.2%, which indicates stabilization, but not a significant strengthening of the role of the industry in the industrial structure (Table 1). Thus, despite the positive dynamics in recent years, the clothing industry continues to occupy an insignificant place in the economy, due to the high share of raw materials industries and the insufficient level of development of the processing sector.

The 2020–2024 period was selected because it captures several important stages in the recent development of Kazakhstan's clothing industry: the pandemic-related disruption of 2020, the subsequent recovery of economic activity, and the most recent medium-term trends available for analysis. This five-year period allows for an assessment of changes in production, investment, retail demand, and the number of operating enterprises during both crisis and post-crisis conditions. However, 2020 represents an atypical baseline, as the COVID-19 pandemic affected supply chains, production processes, consumer behavior, and business activity. Therefore, the observed changes during 2020–2024 are interpreted with caution, since part of the reported growth may reflect recovery from pandemic-related disruptions rather than structural expansion alone.

The number of enterprises engaged in the production of clothing is an indicator of business activity and the entrepreneurial environment in the industry. In 2020, there were 311 enterprises operating in Kazakhstan. In 2021, their number decreased to 308, which means a decrease of 1%. This reduction may be due to the closure of small businesses amid economic instability and the effects of the pandemic. In 2022, the number of enterprises increased to 320, which corresponds to an increase of 3.9% compared to 2021. This indicates a recovery in business activity, the emergence of new market participants and an increase in interest in the clothing business. In 2023, the number of enterprises continued to grow and reached 325, an increase of 1.6%. The growth was less significant but reflects the gradual expansion of the industry. In 2024, there is a slight decrease to 323 enterprises, which corresponds to a decrease of 0.6% (Table 1). This may be due to increased competition, business consolidation, or the withdrawal of the least sustainable enterprises from the market. Analyzing the above-mentioned indicators, it can be noted that even with an increase in the number of enterprises, the contribution of the clothing (garment) industry to the industrial sector remains extremely low. This indicates that enterprises are predominantly small in scale; productivity levels remain low, and the garment industry does not generate significant added value. In addition, the growth in the number of enterprises is not accompanied by a proportional increase in the share of the industry, which indicates a fragmented market and limited production capacity.

Table 1 – Indicators of the garment industry in Kazakhstan for 2020-2024

Indicators	2020	2021	2022	2023	2024
The volume of retail trade in clothing, billion tenge	891,1	1027,5	1 116,1	1 200,6	1 553,7
The volume of clothing production, million tenge	53 627	54 440	65 558	89 471	85 108
Investments in the garment industry (clothing production), million tenge	1 218	1 258	1 325	2 870	3 711
The share of clothing industry products in the total volume of industrial output, in %	0,2	0,1	0,1	0,2	0,2
The number of industrial enterprises producing clothing	311	308	320	325	323

Note: compiled by the author based on the source [17]

Further, for a deeper assessment of the state of the garment industry in Kazakhstan, such indicators as the volume of production in the industry, investments attracted to the industry and the volume of retail trade in clothing are analyzed. An analysis of the dynamics of the clothing industry in Kazakhstan for 2020-2024 shows the multidirectional development of the industry, expressed in the growth of investments and the retail market with more unstable production dynamics. This structure reflects the continuing imbalance between demand and domestic production capacity.

It should be noted that 2020 represents an atypical baseline for interpreting the subsequent dynamics of Kazakhstan's clothing industry, as the COVID-19 pandemic disrupted supply chains, business activity, consumer behavior, and production processes. Therefore, changes observed between 2020 and 2024 should be interpreted with caution, since part of the recorded growth may reflect recovery from pandemic-related disruptions rather than structural expansion alone. The analysis consequently distinguishes between post-pandemic recovery effects and longer-term changes in the industry's production capacity and structural position.

One of the important indicators characterizing the development of the domestic clothing industry is the volume of production in the sector. According to statistics, the volume of clothing production in Kazakhstan increased from 53,627 million tenge in 2020 to 85,108 million tenge in 2024, but the dynamics were uneven. In 2021, the growth was only 1.5% compared to 2020. Such weak dynamics is explained by the consequences of the COVID-19 pandemic, a decrease in business activity and restrictions in supply chains. In 2022, there is a gradual increase, that is, the production of clothing increased by 20.4%, which is associated with the recovery of the economy, increased domestic demand, as well as partial import substitution against the background of changing external economic conditions. In 2023, there is a significant acceleration, an increase of 36.4% (Table 1). This may be due to increased investment, expansion of production capacity, and increased orders from the retail sector and marketplaces. However, in 2024, production is expected to decrease by 4.9%. This decrease may be due to increased competition from imported products, especially from China and Turkey, ris-

ing production costs, as well as the limited technological base of domestic enterprises. Despite the decline in the last year, the overall growth over the period remains significant and amounts to about 59%, which confirms the long-term positive trend.

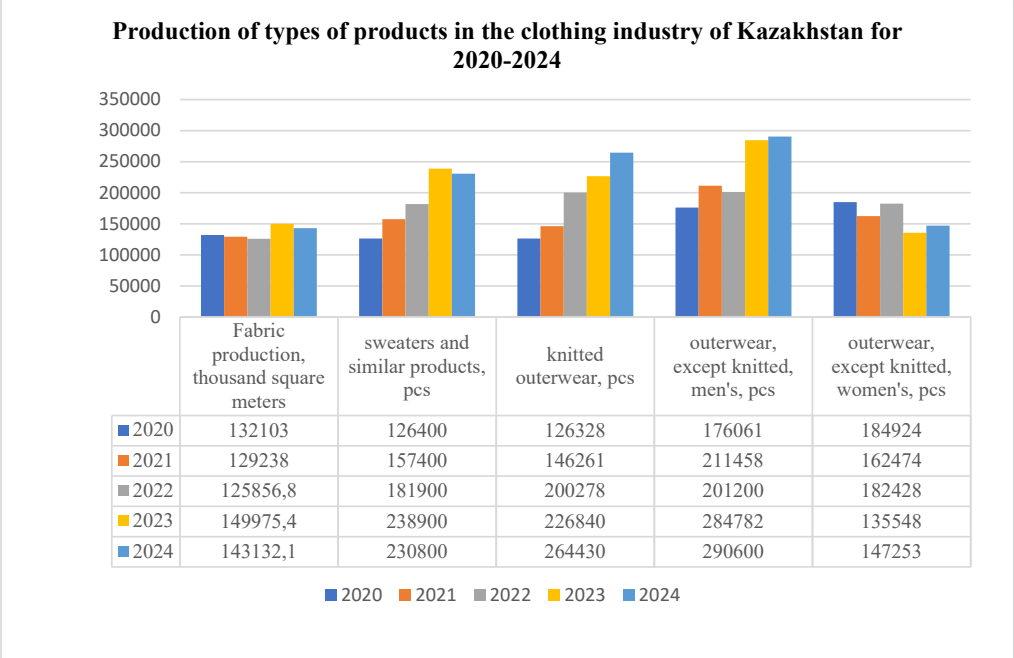
Investments attracted to the clothing industry play a particularly important role in the development of production in the sector. Thus, investments in domestic clothing production increased from 1,218 million tenge in 2020 to 3,711 million tenge in 2024, which corresponds to a more than threefold increase over the period. In 2021, investments increased by 3.3% compared to 2020, reflecting the recovery but cautious nature of investment activity after the pandemic period. Growth was limited due to market uncertainty, weak investment activity of small and medium-sized businesses, and the industry's dependence on imported materials. In 2022, the growth was 5.3%, which is due to the gradual stabilization of the economy, the recovery of consumer demand and the expansion of local clothing manufacturers. In 2023, there is a sharp jump in investment, an increase of 116.6% compared to 2022. This growth may be due to several factors: the intensification of government programs to support industry, the growing interest in import substitution, the expansion of domestic demand for clothing, as well as the development of small and medium-sized businesses in the garment industry. In 2024, investments continued to grow, increasing by 29.3% compared to 2023. However, the growth rate has decreased, which indicates the transition from the investment surge phase to the stabilization phase and the implementation of previously launched projects (Table 1).

As for the retail clothing market, it demonstrates the most stable positive dynamics, increasing from 891.1 billion tenge in 2020 to 1,553.7 billion tenge in 2024. In 2021, clothing retail sales grew by 15.3%, due to the recovery of consumer demand after the pandemic recession and the market's adaptation to online sales formats. However, in 2022, the growth rate decreased to 8.6%, which is due to inflationary pressures and a decrease in real incomes of the population. In 2023, retail trade volume increased by 7.6%, reflecting stable market development without sharp fluctuations (Table 1). In 2024, there is a sharp acceleration in growth to 29.4%, which may be due to the development of e-commerce, the expansion of marketplaces, the growth of consumer lending, as well as an increase in clothing imports, which are rapidly covering the growing domestic demand.

A comparison of the key indicators of the garment industry shows the presence of a structural imbalance in the development of the industry. Investments are growing at the fastest pace, especially in 2023-2024, due to the growing interest of business and government in the development of the clothing industry. Production is increasing much more slowly and is even showing a decline in 2024, indicating a limited production base and technological barriers. At the same time, retail trade is growing steadily and at a faster pace, especially in 2024, when growth was almost 30%, due to the expansion of imports and e-commerce channels. In other words, the garment industry in Kazakhstan in 2020-2024 is characterized as an industry with growing investment attractiveness and an expanding consumer market, but with continuing structural constraints in the manufacturing sector. The main imbalance lies in the fact that the growth of demand and retail trade significantly outstrips the development of domestic production, which increases the country's dependence on imported clothing and underscores the need for further industrialization of the industry.

To assess the development of the garment industry, it is important to analyze not only cost indicators, but also natural output volumes reflecting the real production capabilities of the industry. Let's look at the dynamics of fabric production and individual categories of clothing, which allows us to identify structural changes and trends in specialization.

The volume of fabric production in Kazakhstan in 2020 amounted to 132,103 thousand square meters, after which there was a decrease: in 2021, the figure decreased by 2.2% to 129,238 thousand square meters, and in 2022 — by another 2.6%, to 125,856.8 thousand square meters. This trend may be related to the effects of the pandemic, disruptions in the supply chains of raw materials, as well as high competition from imported fabrics. In 2023, the situation changed: the volume of production increased by 19.2%, reaching 149,975.4 thousand square meters. This may indicate a recovery in the industry, an increase in domestic demand and a partial intensification of textile production. However, in 2024, there is a decrease of 4.6% to 143,132.1 thousand square meters, which may be due to fluctuations in demand, rising production costs or continued dependence on imported raw materials. In general, the dynamics of fabric production is characterized by instability, which indicates the vulnerability of the textile segment and its limited development (Figure 1).



	Fabric production, thousand square meters	sweaters and similar products, pcs	knitted outerwear, pcs	outerwear, except knitted, men's, pcs	outerwear, except knitted, women's, pcs
2020	132103	126400	126328	176061	184924
2021	129238	157400	146261	211458	162474
2022	125856,8	181900	200278	201200	182428
2023	149975,4	238900	226840	284782	135548
2024	143132,1	230800	264430	290600	147253

Figure 1 – Dynamics of changes in the volume of production of certain groups of products in the garment industry of Kazakhstan in 2020-2024.

Note: compiled by the author based on the source [17]

As for the production of sweaters, pullovers and similar products, as one of the most common types of products in this industry, their production demonstrates a steady positive trend for almost the entire period. In 2021, output increased by 24.5% compared to 2020, by another 15.6% in 2022, and accelerated to 31.3% in 2023. This increase may be due to an increase in demand for knitwear, the development of local brands, as well as the expansion of production in the casual clothing segment. In 2024, there is a slight decrease of 3.4%, which may be due to market saturation, changes in consumer preferences, or increased competition from imported products. Nevertheless, overall, production has almost doubled over the period, which indicates the high dynamics of this segment (Figure 1).

The production of knitted outerwear demonstrates the most steady and stable growth among all the categories under consideration. In 2021, the volume increased by 15.8%, in 2022 — by 36.9%, in 2023 — by 13.3%, and in 2024 — by another 16.6%. This positive trend can be explained by the growing popularity of comfortable casual clothing, the development of the fast fashion segment, as well as the relative technological availability of knitwear production compared to more complex sewing products. The growth of this segment indicates the formation of the industry's specialization towards knitting production (Figure 1).

The production of men's outerwear (except knitwear) also shows generally positive dynamics, despite some fluctuations. In 2021, output increased by 20.1%, due to the recovery in demand after the pandemic. In 2022, there is a decrease of 4.8%, which may be due to rising costs, lower demand, or increased import competition. However, a sharp increase of 41.5% is recorded in 2023, and an additional increase of 2.0% in 2024 (Figure 1). This may be due to the expansion of production capacities, the growth of orders and the activation of the domestic market. Overall, the segment shows growth potential, but remains sensitive to external factors.

Unlike the men's segment, the production of women's outerwear is characterized by high instability. In 2021, there is a decrease of 12.1% compared to 2020, which may be due to a drop in demand or a change in consumer preferences. In 2022, there is a recovery — an increase of 12.3%, but in 2023 there is a sharp decrease of 25.7%, which is the most significant drop among all the indicators considered. In 2024, there is a partial recovery, with an increase of 8.6%, but volumes remain below the level of 2020 (Figure 1). Such instability can be explained by high competition from imported products, rapid change of fashion trends and dependence on the assortment.

An analysis of the dynamics of the development of certain types of products of the garment industry in Kazakhstan shows that the development of the industry is uneven and segmented. The segments of knitted products (sweaters, knitted outerwear) are developing most steadily, which is associated with lower barriers to entry and stable demand. The production of fabrics remains unstable, which indicates the weakness of the textile base and dependence on imports. The production of outerwear (especially women's) is subject to significant fluctuations, which is associated with high competition and variability in demand. In general, the analysis of natural indicators indicates that the garment industry in Kazakhstan is developing mainly in segments with lower technological complexity and high product turnover. At the same time, structural constraints remain related to the insufficient development of textile production, high dependence on imports and instability of individual segments. For the sustainable development of the industry, it is necessary to diversify production, develop the raw material base and increase the technological level of enterprises.

The analysis of the dynamics of the main indicators of the clothing industry in Kazakhstan for 2020-2024 makes it possible to identify a number of systemic problems hindering its development, as well as identify key areas for their solution. Despite the positive trends expressed in the growth of investments and the expansion of the consumer market, the industry is still characterized by structural imbalance and limited efficiency.

One of the key problems is the extremely low share of the garment industry in the total volume of industrial production, which fluctuates between 0.1 and 0.2% during the analyzed period. This indicates the weak role of the industry in the country's economy and its limited contribution to the formation of industrial added value. This situation is caused by the dominance of raw materials industries, as well as the insufficient development of the processing sector, including textile and clothing production. *The next important problem* is the gap between dynamically growing consumer demand and limited domestic production opportunities. The analysis showed that the volume of retail clothing trade shows steady growth, while production increases less evenly and even decreases in some periods. This indicates that domestic demand is largely met by imported products, which increases the industry's dependence on external supplies and reduces its resilience to external economic shocks. *An additional limiting factor* is the weak development of the textile base. The unstable dynamics of fabric production, including periods of decline, indicates the underdevelopment of the primary link in the production chain. As a result, garment companies are forced to rely on imported raw materials, which increases the cost of production and reduces the competitiveness of domestic manufacturers. An analysis of the industry's structure shows that it is characterized by a high degree of fragmentation and a predominance of small enterprises. Despite the increase in their number in some years, this does not lead to a significant increase in the share of the industry in the industry. This indicates a low level of productivity, limited business scaling capabilities, and insufficient technological equipment. In addition, the industry is characterized by *instability in certain segments of production*, in particular fabrics and women's outerwear. This is due to its high sensitivity to changes in demand, fashion trends, and increased competition from imported products. Such fluctuations complicate long-term planning and reduce the investment attractiveness of individual areas.

The issue of investment efficiency deserves special attention. Despite their significant growth, especially in 2023-2024, the increase in investments is not accompanied by a comparable increase in production. This may be due to the fact that investments are mainly directed towards expanding current activities rather than deep technological modernization, as well as the time lag between investments and their economic impact.

Although the increase in production between 2020 and 2024 indicates an overall expansion in nominal output, this result should not be interpreted as conclusive evidence of sustained structural transformation. A more reliable assessment would require comparison with pre-pandemic indicators and a longer observation period to distinguish temporary recovery effects from persistent improvements in industrial capacity.

The analysis of the dynamics and structure of the clothing industry in Kazakhstan indicates the need to implement comprehensive measures aimed at eliminating the identified problems and ensuring the sustainable development of the industry. The proposed directions require more detailed study and can be presented as follows. *First,* the key focus is the development of a full production cycle within the country. Currently, the industry is characterized by a gap between the production of raw materials and the production of finished products, which leads to a drain on added value. To overcome this problem, it is necessary to form textile clusters combining cotton processing, fabric production and tailoring. This will reduce dependence on imported materi-

als, reduce costs and increase product competitiveness. An important condition is the creation of infrastructure — industrial zones, affordable energy resources and logistics centers. *Secondly*, technological modernization of enterprises is required. A significant part of the production facilities operate on outdated equipment, which limits productivity and product quality. In this regard, it is necessary to stimulate the renewal of fixed assets, the introduction of automated production lines, digital production management systems and modern sewing technologies. This will reduce production costs, improve the accuracy and speed of order fulfillment, and adapt to the requirements of the modern market. *Thirdly,* an important area is the consolidation and cooperation of enterprises. The predominance of small-scale production reduces the efficiency of the industry as a whole. It is necessary to encourage the creation of production associations, the development of contract manufacturing and outsourcing, which will allow enterprises to specialize in individual production stages and increase their efficiency. Cooperation also facilitates technology exchange and cost reduction. *Fourth,* it is necessary to increase the competitiveness of domestic products. This implies not only cost reduction, but also the development of intangible factors such as design, branding and marketing. The formation of national brands focused on domestic and foreign markets will increase the added value and increase the recognition of Kazakhstani products. Particular attention should be paid to niche segments where competition with mass imports is less pronounced. *Fifth,* significant potential is associated with the development of the export sector. Kazakhstan has the opportunity to expand the supply of products to the markets of Central Asia and neighboring countries. This requires the creation of export support mechanisms, including financial instruments, logistical support and product promotion in foreign markets. Integration into regional and global supply chains will enhance the sustainability of the industry. *Sixth,* special attention should be paid to the development of human resources. The lack of qualified specialists is one of the key limitations. In this regard, it is necessary to modernize the vocational education system, develop dual training, and raise the prestige of working professions in the garment industry. The training of technologists, designers and production management specialists is an important prerequisite for improving the efficiency of the industry. *Seventh,* the development of e-commerce and logistics infrastructure is an important area. Modern digital platforms allow manufacturers to reach consumers directly, reducing their dependence on traditional sales channels. The development of marketplaces, online sales, and delivery systems contributes to market expansion and increased product availability. Improved logistics, in turn, allows for shorter delivery times and lower costs.

The proposed modernization measures can be aligned with existing state support instruments for Kazakhstan's light industry. In particular, the sector has benefited from measures aimed at compensating part of equipment acquisition costs, providing preferential financing, and supporting investment projects in special economic zones. The development of the TURAN Special Economic Zone as a location for cotton-textile production demonstrates how industrial infrastructure and investment incentives can be combined to support vertically integrated manufacturing. However, the effectiveness of such instruments should be assessed not only by the volume of attracted investment but also by their contribution to domestic textile production, technological upgrading, increased processing depth, and the expansion of locally generated value added.

A practical example of this approach is the cotton-textile cluster being developed in the Turkestan Region within the TURAN Special Economic Zone. The project, implemented with the participation of Xinjiang Lihua, is designed to establish an integrated production chain encompassing cotton cultivation, raw material processing, yarn and fabric manufacturing, and the production of finished textile goods. According to Kazakhstan's Government, the planned investment volume exceeds KZT 200 billion, with more than KZT 58 billion allocated for the initial stage. This project illustrates the potential scale of investment required to address the structural weaknesses identified in Kazakhstan's clothing industry, particularly the underdevelopment of domestic textile production and the limited integration of upstream and downstream manufacturing activities. Accordingly, public policy should prioritize investment projects that connect raw material production with textile and garment manufacturing, rather than focusing exclusively on the expansion of individual sewing enterprises [18].

Thus, the proposed measures are comprehensive and aimed at eliminating key structural constraints of the garment industry in Kazakhstan. Their implementation will increase the level of localization of production, increase added value, strengthen the competitiveness of the industry and ensure its more significant role in the country's economy.

CONCLUSION

Data limitations. This study has several limitations that should be considered when interpreting its findings. First, the analysis relies primarily on aggregated official statistics obtained from a single statistical source, which limits the possibility of cross-validating the reported indicators using alternative datasets. Second, the study does not include enterprise-level information on production efficiency, technological equipment, input costs, labor productivity, profitability, or the structure of investment expenditure. Consequently, the analysis identifies sector-level trends and structural imbalances but cannot establish firm-level causal relationships or determine precisely how investments affect productivity and technological upgrading. Third, the 2020–2024 observation period includes the COVID-19 pandemic and subsequent recovery, which may influence the interpretation of growth rates and year-to-year comparisons. Finally, the study focuses on selected quantitative indicators and does not comprehensively assess qualitative factors such as managerial capabilities, innovation adoption, brand competitiveness, or supply-chain governance. Future research could address these limitations through enterprise-level surveys, interviews with industry stakeholders, and the integration of statistical data from multiple sources over a longer observation period.

As a result of the conducted research, it has been established that the clothing industry in Kazakhstan has been demonstrating contradictory dynamics in recent years, combining positive quantitative changes with continuing structural constraints. On the one hand, there is a significant increase in investments, the expansion of the retail clothing market and an increase in individual production segments, especially in the knitwear group. On the other hand, the development of the industry is uneven and is accompanied by a number of systemic problems. The analysis showed that the share of the garment industry in total industrial production remains extremely low, which indicates its limited role in the country's economy. At the same time, there remains a pronounced imbalance between rapidly growing consumer demand and insufficient domestic production capabilities, which increases dependence on imported products. Additional constraining factors are the weak development of the textile base, the instability of individual production segments, low productivity and fragmentation of the industry, as well as insufficient efficiency of investment processes.

At the same time, the identified trends indicate that there is significant potential for development. The growth of investment activity, the increase in the number of enterprises and the expansion of the domestic market create prerequisites for the structural transformation of the industry. However, in order to realize this potential, it is necessary to move from a fragmented and import-dependent model to a more integrated system based on the development of a full production cycle and an increase in the level of added value.

In this regard, the main directions of the garment industry development are substantiated, including the formation of textile clusters, technological modernization of enterprises, development of cooperation and business expansion, increasing product competitiveness, expanding export potential, as well as the development of personnel and logistics support for the industry. The implementation of these measures will increase the sustainability of the clothing industry, reduce dependence on external factors and ensure more efficient use of domestic economic potential.

Thus, the clothing industry in Kazakhstan is at the stage of structural transformation, where further development will be determined by the ability to adapt to modern conditions, introduce innovations and form sustainable production and distribution chains. Despite the existing difficulties, the industry has significant potential for growth. Its implementation will depend on the effectiveness of government policy, the level of investment, as well as the ability of businesses to adapt to changing conditions and take advantage of new opportunities.

The findings provide a basis for identifying the strategic priority of state policy in Kazakhstan’s clothing industry. The simultaneous expansion of the retail market and investment activity, alongside the unstable dynamics of clothing and fabric production, indicates that the sector’s main constraint is not the absence of market demand but the limited capacity to convert this demand into domestically generated value added. This suggests that further support for isolated garment enterprises, while necessary, is insufficient to overcome the industry’s structural weaknesses. The central policy priority should therefore be the development of integrated domestic production chains, supported by targeted technological modernization and investment in textile processing. The formation of cotton-textile clusters, particularly in regions with an established raw-material base, offers a mechanism for linking agricultural production with spinning, weaving, fabric finishing, and garment

manufacturing. Such an approach directly addresses the structural imbalance identified in the study. Its effectiveness should be evaluated through indicators such as the depth of domestic raw-material processing, growth in value added, productivity, and the share of locally produced intermediate and finished goods.

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ҚАЗАҚСТАННЫҢ ТІГІН ӨНЕРКӘСІБІ: ҚАЗІРГІ ЖАҒДАЙЫ, МӘСЕЛЕЛЕРІ ЖӘНЕ ДАМУ ПЕРСПЕКТИВАЛАРЫ

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АҢДАТПА

Мақалада экономиканың құрылымдық трансформациясы және ішкі тұтыну нарығының өсуі жағдайында Қазақстанның тігін өнеркәсібін дамытудың заманауи үрдістері мен проблемалары қарастырылады.

Зерттеудің мақсаты өндірістік, инвестициялық және нарықтық көрсеткіштерді талдау негізінде саланың жай-күйін кешенді бағалау, сондай-ақ оның дамуының негізгі мәселелері мен перспективаларын анықтау болып табылады.

Зерттеудің әдіснамалық негізі экономикалық-статистикалық талдау, салыстырмалы және құрылымдық талдау әдістері, сондай-ақ сандық деректерді жалпылау және түсіндіру әдістері болып табылады. Жұмыста Инвестициялар, өндіріс көлемі, бөлшек сауда, сондай-ақ өнім шығарудың заттай көрсеткіштері бойынша деректерді қоса алғанда, ресми статистикалық көрсеткіштер пайдаланылды.

Зерттеудің бірегейлігі құндық және заттай көрсеткіштерді бір мезгілде ескере отырып, Қазақстанның тігін өнеркәсібіне кешенді талдау жүргізу болып табылады, бұл инвестициялық белсенділік, өндіріс және тұтыну арасындағы құрылымдық теңгерімсіздіктерді анықтауға мүмкіндік берді. Қолданыстағы зерттеулерден айырмашылығы, саланың әртүрлі сегменттерінің динамикасын салыстыруға және олардың біркелкі емес даму себептерін анықтауға баса назар аударылады.

Зерттеу нәтижелері инвестициялардың айтарлықтай өсуіне және бөлшек сауда нарығының кеңеюіне қарамастан, тігін өнеркәсібі өнеркәсіптік құрылымдағы төмен үлеспен, импортқа жоғары тәуелділікпен және тұрақсыз өндіріс динамикасымен сипатталатынын көрсетеді. Өсіп келе жатқан сұраныс пен ішкі өндірістің шектеулі мүмкіндіктері арасындағы алшақтық анықталды. Жүргізілген талдау негізінде толық өндірістік циклды қалыптастыруды, технологиялық жаңғыртуды, кооперацияны дамытуды, өнімнің бәсекеге қабілеттілігін арттыруды және экспорттық әлеуетті кеңейтуді қоса алғанда, саланы дамытудың негізгі бағыттары негізделген. Алынған нәтижелер Қазақстанның жеңіл өнеркәсібін дамытудың салалық саясаты мен стратегияларын әзірлеу кезінде пайдаланылуы мүмкін.

Түйінді сөздер: тігін өнеркәсібі, киім өндірісі, тігін өнеркәсібінің индикаторлары, киім нарығы, Қазақстан экономикасы

ШВЕЙНАЯ ПРОМЫШЛЕННОСТЬ КАЗАХСТАНА: СОВРЕМЕННОЕ СОСТОЯНИЕ, ПРОБЛЕМЫ И ПЕРСПЕКТИВЫ РАЗВИТИЯ

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АННОТАЦИЯ

В статье рассматриваются современные тенденции и проблемы развития швейной промышленности Казахстана в условиях структурной трансформации экономики и роста внутреннего потребительского рынка.

Целью исследования является комплексная оценка состояния отрасли на основе анализа ключевых производственных, инвестиционных и рыночных показателей, а также выявление основных ограничений и перспектив её развития.

Методологическую основу исследования составляют методы экономико-статистического анализа, сравнительного и структурного анализа, а также методы обобщения и интерпретации количественных данных. В работе использованы официальные статистические показатели, включая данные по инвестициям, объемам производства, розничной торговле, а также натуральным показателям выпуска продукции.

Уникальность исследования заключается в проведении комплексного анализа швейной промышленности Казахстана с одновременным учетом стоимостных и натуральных показателей, что позволило выявить структурные дисбалансы между инвестиционной активностью, производством и потреблением. В отличие от существующих исследований, акцент сделан на сопоставлении динамики различных сегментов отрасли и выявлении причин их неравномерного развития.

Результаты исследования показывают, что, несмотря на значительный рост инвестиций и расширение розничного рынка, швейная промышленность характеризуется низкой долей в промышленной структуре, высокой зависимостью от импорта и нестабильной динамикой производства. Выявлен разрыв между растущим спросом и ограниченными возможностями внутреннего производства. На основе проведённого анализа обоснованы ключевые направления развития отрасли, включая формирование полного производственного цикла, технологическую модернизацию, развитие кооперации, повышение конкурентоспособности продукции и расширение экспортного потенциала. Полученные результаты могут быть использованы при разработке отраслевой политики и стратегий развития лёгкой промышленности Казахстана.

Ключевые слова: швейная промышленность, производство одежды, индикаторы швейной промышленности, рынок одежды, экономика Казахстана

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