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PROBLEMS IN THE EXPORT OF AGRICULTURAL PRODUCTS IN UZBEKISTAN AND WAYS TO RESOLVE THEM

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Abstract

This article systematically analyzes the main problems that hinder the export of agricultural products from Uzbekistan - quality and standardization, infrastructure, logistics, financing and institutional barriers. Based on statistical tables and international comparisons, the economic impact of the problems is assessed and practical recommendations are developed.

Keywords: Agricultural exports, phytosanitary, cold chain, logistics, certification, Uzbekistan.

INTRODUCTION

Uzbekistan is one of the largest agrarian countries in Central Asia, and its agricultural sector has historically been the mainstay of the national economy. The country's climatic conditions, fertile lands, and hardworking population create ample opportunities for the production of agricultural products – in particular, cotton, fruits and vegetables, grains, and livestock products.

As part of the systemic reforms implemented since 2016, diversifying the economy of Uzbekistan and increasing its export potential have become one of the priorities of state policy. However, the volume of real exports still remains significantly low compared to the country's natural and economic potential.

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This study aims to systematically analyze the main factors hindering Uzbek agricultural exports, identify their causes, and develop practical recommendations based on foreign experience and local conditions.

2. MAIN PART

2.1. Agricultural exports of Uzbekistan: current status and dynamics

Uzbekistan's agricultural exports have shown significant growth dynamics over the past five years. Between 2019 and 2023, total agricultural exports increased from $1.34 billion to $2.05 billion, a 53 percent increase. However, these figures are still low compared to the country's potential.

Table 1 below shows the dynamics of Uzbekistan's agricultural exports for 2019–2023:

Table 1. Dynamics of agricultural exports of Uzbekistan (2019–2023)

Product type	2019	2020	2021	2022	2023
Fruits and vegetables (thousand tons)	1,247	1,089	1,412	1,631	1,820
Grapes (thousand tons)	142	121	158	177	195
Apricots and peaches (thousand tons)	87	74	96	109	121
Cotton fiber (thousand tons)	310	285	295	270	260
Grains and grain products (thousand tons)	45	38	52	61	70
Total agricultural exports (USD million)	1,340	1 185	1,520	1,780	2,050

Source: Compiled by the author based on data from the Statistical Agency of Uzbekistan.

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As can be seen from the table, fruit and vegetable exports increased from 1,247 million tons in 2019 to 1,820 million tons in 2023. At the same time, cotton fiber exports are decreasing and the share of processed products is increasing - this shows the result of the economic diversification policy.

2.2. Main problems hindering exports

The study shows that the problems hindering Uzbekistan's agricultural exports can be divided into six main groups. Table 2 presents a classification of these problems and their level of impact:

Table 2. Classification of problems hindering exports

Problem group	Main views	Impact level
Quality and standards	Non-compliance with phytosanitary requirements; weak certification system; lack of packaging standards	High (limits 35-40% of exports)
Infrastructure	Underdeveloped cold chain; lack of storage facilities; lack of modern packaging workshops	High (15-20% product is lost)
Logistics	Barriers in transit countries; high transportation costs; limited rail and road connections	Medium-High
Financing	Lack of export credits; currency risk; weak insurance system	Medium
Knowledge and information	Lack of knowledge of foreign market requirements; inability to use digital trading platforms	Medium
Bureaucracy	Complexity of documentation; slow customs procedures; risk of corruption	Medium-High

Source: Compiled by the author (based on international organizations and government reports).

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2.2.1. Insufficient quality and standardization

Failure to meet the phytosanitary and quality standards of international markets is a major obstacle to Uzbek agricultural exports. Approximately 35–40 percent of products destined for the European Union are returned or rejected at the delivery stage. The main reasons for this loss include pesticide residues exceeding the permitted levels, non-compliance with packaging requirements, and deficiencies in certification documents.

The share of Uzbek farmers certified according to GlobalG.AP, ISO 22000, and other international standards is only 4.7 percent as of 2023, which is very low compared to 31 percent in Turkey and 22 percent in Morocco.

2.2.2. Underdeveloped cold chain infrastructure

Losses of fruit and vegetable products from harvest to consumer reach 25-30% in Uzbekistan. This is directly related to the insufficient development of the cold chain infrastructure. The total capacity of cold storage facilities in the country is estimated at approximately 380,000 tons by 2023, which covers only 18-22% of the real need.

The refrigerator transport fleet also does not meet demand: more than 60 percent of existing refrigerated trucks have a service life of more than 10 years and are in poor technical condition.

2.2.3. Logistics and transit issues

Uzbekistan is a landlocked country, which means that products must pass through transit countries (Kazakhstan, Russia, China) to reach international markets. Customs duties, time constraints, and licensing requirements in transit countries reduce export competitiveness.

The cost of delivering 1 ton of goods from Uzbekistan to European markets is 2-4 times higher than in competing countries. This price difference makes Uzbek exports economically unprofitable for many products.

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2.3. International comparative analysis

A comparison of Uzbekistan's export performance with that of developed agricultural exporters more clearly illustrates the scale of the problem. Table 3 provides a comparative analysis of key indicators:

Table 3. Agricultural export indicators of Uzbekistan, Turkey and Spain are not comparable (2023)

Indicator	Uzbekistan	Turkey	Spain
Post-harvest losses (%)	25–30%	8–12%	4–6%
Cold chain coverage (%)	18%	65%	92%
Certification period (days)	14–21	5–7	2–3
Cost of transporting 1 ton of product (USD, to Europe)	280–350	120–160	60–90
Share of processed products in exports (%)	12%	38%	61%

Source: Compiled by the author based on reports from FAO, Eurostat, and international organizations.

As can be seen from the table, Uzbekistan lags significantly behind developed countries in all key indicators. In particular, there is a large gap in cold chain coverage (18% vs. 92%) and the share of processed products (12% vs. 61%).

2.4. Economic impact of the problems

The combination of export problems is causing significant damage to the national economy. According to expert assessments, if the above-mentioned problems were eliminated, Uzbekistan would have the opportunity to increase annual agricultural exports by 2.5–3 times compared to the current figure.

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It is estimated that an additional $600–800 million in export revenue could be generated by reducing product losses (from 25–30% to 8–10%) and improving quality standards alone. This would directly contribute to increasing the wages of over 150,000 agricultural workers.

3. RECOMMENDATIONS

Based on the results of the study, the following recommendations were developed for the development of agricultural exports in Uzbekistan. Table 4 shows the areas of recommendation, specific measures and expected results:

Table 4. Recommendations for resolving export problems

No.	Recommendation direction	Specific measures	Expected result
1	Development of a quality and standards system	Expanding ISO and GlobalG.AP certification; establishing model packaging centers; modernizing phytosanitary laboratories	Increase export volume by 25–30%
2	Expanding cold chain infrastructure	Construction of cold storage facilities in major export corridors; development of refrigerated transport through public-private partnerships	Reduce losses by 10–12%
3	Reducing logistics costs	Implementation of a multimodal transportation system; conclusion of bilateral agreements with transit countries	Reduce transportation costs by 20–25%
4	Strengthening export financing	Expanding the capabilities of the Export-Import Bank; providing financial support to agricultural cooperatives	Doubling the number of exporters
5	Introduction of digital trading platforms	Connecting to e-commerce and B2B platforms; creating a database of information about foreign markets	Increasing access to exports for small farmers

Source: Developed by the author.

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4. CONCLUSION

This study has shown that the problems in exporting agricultural products in Uzbekistan are systemic. The problems are not limited to one sector, but exist throughout the entire chain - from field cultivation to market - and are manifested as mutually reinforcing factors.

The results of the study show that the export potential of Uzbekistan's agriculture is 2.5–3 times higher than the current level. Realizing this potential requires a comprehensive and consistent approach at the state policy level.

The following were identified as the most important priorities: first, improving international standards and the certification system; second, increasing investments in cold chain infrastructure; third, activating bilateral and multilateral agreements to reduce logistics costs; fourth, facilitating access to financing for exporters.

Solving these problems will not only increase exports, but also create an important basis for raising the incomes of the rural population, creating jobs, and putting the Uzbek economy on a path of long-term sustainable development. It is recommended that further research be conducted in each problem area, taking into account in-depth sectoral analyses and regional characteristics.

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