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PROSPECTS FOR THE DEVELOPMENT OF UZBEKISTAN'S EXPORTS IN THE CONTEXT OF ACCESSION TO THE WTO

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Abstract

The article examines the prospects for the export development of Uzbekistan against the backdrop of the active phase of negotiations on accession to the World Trade Organization (WTO). Based on official statistical data and WTO documents, the study analyzes the current state of exports, the expected effects of accession, institutional and regulatory reforms (SPS/TBT, technical regulation, trade facilitation), as well as sectoral directions of deep processing and diversification. The experience of regional countries (Kazakhstan, Kyrgyzstan) is compared. Practical recommendations for government bodies and businesses are formulated. The main conclusions are as follows: accession to the WTO can accelerate the structural shift from raw material to non-raw material exports, expand access to markets and investments, provided that the system of standards and quality infrastructure is modernized in parallel, along with targeted support for exporters.

Keywords: WTO, export, Uzbekistan, trade liberalization, SPS, TBT, technical regulation, trade facilitation, diversification.

Introduction

In recent years, Uzbekistan's foreign trade policy has undergone systemic changes aimed at integrating into global value chains and increasing the



competitiveness of exports. In 2024, the country's foreign trade turnover reached USD 65.9 billion, of which exports accounted for USD 26.95 billion and imports for USD 38.98 billion. This represents growth of 3.8% in total turnover and 8.4% in exports compared to 2023 (according to the Statistics Agency under the President of the Republic of Uzbekistan, as reported in the media).

The policy framework for reforms was strengthened by Presidential Decree No. PP-85 of June 3, 2024, which is aimed at accelerating market reforms and aligning national legislation with WTO agreements. Furthermore, Uzbekistan has officially set the goal of completing accession negotiations by the 14th WTO Ministerial Conference (Yaoundé, Cameroon, 2026).

The purpose of this article is to assess the prospects for Uzbekistan's exports in the context of WTO accession and to propose practical recommendations for maximizing benefits and minimizing risks.

The objectives are: (i) to describe the current state of exports; (ii) to analyze the expected effects of WTO membership; (iii) to identify priority sectors and "bottlenecks" in the regulatory environment; and (iv) to propose policy measures.

Research Methods

The study applies a comprehensive approach combining elements of comparative, statistical, and institutional analysis. The research is based on official statistical materials from the Statistics Agency of the Republic of Uzbekistan, the World Trade Organization, the International Monetary Fund, the World Bank, and the International Trade Centre.

To assess dynamics, a time-series analysis method was used to trace changes in exports during 2016–2025 and identify stable trends. The comparative method was applied to examine Uzbekistan's experience against the outcomes of WTO accession in Kazakhstan and Kyrgyzstan, which made it possible to identify both positive and negative effects of trade liberalization for regional countries.

Institutional analysis was employed to review the national regulatory framework (in particular, Presidential Decree No. PP-85 of 03.06.2024) and projects aimed at harmonizing technical regulations and sanitary standards with WTO requirements. In addition, content analysis methods were used to study official



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WTO documents (Trade Facilitation Agreement, SPS and TBT Agreements), as well as analytical reports of international organizations.

This methodological toolkit made it possible to substantiate conclusions about the prospects for Uzbekistan's exports and to formulate practical recommendations for both the state and businesses.

Statement of the Scientific Problem

In recent years, Uzbekistan's foreign trade policy has been undergoing profound transformation. According to data for the end of 2024, the country's trade turnover reached a record USD 65.9 billion (+3.8% compared to 2023), with exports amounting to USD 26.95 billion (+8.4% year-on-year) and imports USD 38.98 billion. The dynamics of the first months of 2025 confirm recovery and growth momentum: in the first quarter of 2025, exports amounted to USD 8.1 billion, which is 24.4% higher than a year earlier.

Uzbekistan's main trading partners are China, Russia, Kazakhstan, and Turkey: in 2024, China accounted for 18.9% of turnover, Russia – 17.6%, Kazakhstan – 6.5%, and Turkey – 4.5%.

The commodity structure of exports remains resource-based: according to OEC estimates, about 61% of exports in 2023 came from precious metals (mainly unprocessed gold), 6% from copper, and about 5% from mineral fertilizers. Other items (cotton, oil, machinery products) had significantly smaller shares (5–10% each). This ratio indicates the persistence of a resource-oriented export profile and highlights the need for deeper processing in priority industries.

WTO Accession: Advantages and Challenges for Export Development

Accession to the WTO promises a number of significant advantages for exports. Membership in the organization ensures predictability of rules and reduced risks: the binding of tariffs and non-tariff barriers on a long-term basis increases the confidence of foreign investors and buyers. International statistics show that, on average, trade flows between WTO member countries eventually increase by about 2.4 times. Moreover, research indicates that if a country undertakes deep commitments during accession negotiations (e.g., on trade liberalization and



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procedural simplification), its GDP may grow by an additional 1.5 percentage points per year compared with the alternative scenario.

Another important element is the **Trade Facilitation Agreement (TFA)**. Its full implementation reduces border-crossing costs by an average of 14% and could add around USD 1 trillion to global trade turnover. In other words, reforms in “trade facilitation” — such as customs digitalization, introduction of a “single window,” risk-based inspections, and pre-clearance of shipments — effectively cut red tape and accelerate the movement of goods. For Uzbekistan, these changes are particularly significant: international partners (e.g., the United States) have already noted Tashkent’s progress in aligning its customs regulations with WTO norms.

A major effect of accession may also be **institutional modernization**. Under the external pressure of WTO obligations, the harmonization of standards and conformity assessment procedures is accelerating. Uzbekistan has taken substantial steps in this direction: in February 2024, by Presidential decree, the Agency for Technical Regulation (O‘ZTTSA) under the Cabinet of Ministers was established as a centralized body to consolidate the functions of standardization, metrology, and accreditation. Furthermore, with support from international organizations, specialized trainings have been held. For instance, in January 2025, Tashkent hosted a seminar on ISO methodology for developing a national standardization strategy, with the participation of O‘ZTTSA, Uzstandart, metrology institutes, and the “UzTest” laboratory. Similarly, in September 2024, a group of Uzbek experts studied the EU’s food safety control practices during a study visit to Latvia, which helped adjust the draft new Law “On Food Safety” and incorporate EU best practices into local inspection procedures.

In technical regulation, WTO encourages the use of international standards: the TBT and SPS Agreements promote the alignment of national rules with global benchmarks (e.g., ISO 9000 for quality, Codex Alimentarius for food safety). Thanks to these measures, Uzbek legislation and control systems are gradually converging with international norms, which will improve market access for Uzbek products abroad.



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Of course, alongside advantages there are **challenges**. Trade liberalization will intensify domestic competition, especially in sensitive sectors such as agriculture and light industry. This necessitates phased adaptation measures and support for farmers and small enterprises (e.g., social programs and subsidies for essential goods). Another challenge lies in meeting SPS/TBT standards: the laboratory and inspection infrastructure in Uzbekistan is still weaker than in developed countries, and supply-chain traceability systems are only beginning to be established. International experts emphasize that without investments in “quality infrastructure” (accreditation, certification, laboratory networks), access to highly developed markets (EU, USA) will remain difficult. Administrative and human resources are also limited: implementation of WTO agreements requires strong interagency coordination and stable financing of preparatory measures.

The experiences of Kazakhstan and Kyrgyzstan illustrate important lessons. Kazakhstan rapidly developed e-government and the “single window,” upgraded its technical regulation system, and effectively implemented the TFA. Kyrgyzstan, by contrast, demonstrated that formal membership without functioning institutions and regulatory norms is merely a statement of intent rather than a guarantee of success.

Priority sectors require special attention. In mining and metallurgy, the focus should shift from exporting raw materials to semi-finished products and components — for example, from copper cathodes to copper wires and conductors, which requires production modernization and compliance with European technical regulations (e.g., electrical safety, RoHS, REACH). In the chemical industry, it is advisable to develop the production of complex fertilizers and high-value chemical reagents, taking into account strict compliance with REACH and other standards of target markets.

Agriculture and food processing should focus on “premium” niches: expanding production of organic and processed products (dried fruits, nuts, canned vegetables), which requires rigorous implementation of HACCP/ISO 22000 systems and national traceability. With EU and ITC support, Uzbekistan is already updating food safety rules and developing a national standardization strategy, which will facilitate product access to EU markets.



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In textiles and apparel, the government encourages a shift from cotton yarn to finished clothing and technical fabrics. Measures include subsidies for logistics (compensation of up to 50% of freight costs), gradual simplification of customs procedures, and access to foreign certification. Export of services is also highly promising — particularly IT services and B2B outsourcing. For this, flexible trade infrastructure is needed: simplified cross-border payments, enhanced data protection, and recognition of electronic trust services. These issues have been partly discussed in negotiations with the US and WTO initiatives on digital trade (JSI on e-commerce), but further efforts will be required to implement international agreements and national laws in this field.

To successfully capitalize on WTO membership, it is crucial to combine macro-reforms with targeted export support. The government is advised to finalize accession negotiations effectively: securing adequate commitments (especially in services and competition) while clearly justifying the length of transition periods for vulnerable sectors. A “roadmap” should be adopted for the alignment of SPS/TBT rules, with specific KPIs for laboratory accreditation, certificate recognition, and the number of export consignments certified as compliant.

Targeted measures should be expanded: reimbursement of logistics and marketing expenses for non-resource exporters, particularly SMEs, and the development of export financing through banks and export credit agencies. Currently, exporters already benefit from compensation (the state reimburses up to 50% of transport costs) and insurance (through “Uzbekexport”/“Uzbekinvest,” the national insurance agency covering commercial and political risks). These measures should be maintained and scaled up.

Additionally, customs processes need modernization: introduction of pre-declaration, risk-based inspections, and data exchange with key markets under international standards, in line with WTO Trade Facilitation recommendations.

For businesses, active preparation for the new conditions is essential. Companies need to invest in compliance with international standards (HACCP/ISO 22000 for food products, ISO 9001/14001 for management and environmental standards, EU/WTO sectoral regulations). At the same time, they should make full use of government incentives: participating in reimbursement programs,



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insuring exports through “Uzbekinvest,” and seeking development project support. Exporters should diversify markets and product portfolios, replacing shares of gold and cotton with higher value-added goods (copper electrical products, finished apparel, processed foods). Active participation in developing national technical regulations together with O’ZTTSA and industry associations will accelerate the harmonization of standards in line with export objectives.

Conclusion

Uzbekistan’s accession to the WTO should not be seen as an end in itself, but rather as a mechanism for externally anchoring structural reforms that open a window of opportunity for the development of high value-added exports. Current macroeconomic trends (export growth in 2024–2025) demonstrate the market’s potential. However, in order for these trends to be sustained and strengthened, the country must deeply modernize its quality infrastructure, ensure the implementation of Trade Facilitation and SPS/TBT norms, and continue targeted support for non-resource producers. With the consistent implementation of the “roadmap” toward the 14th WTO Ministerial Conference and close cooperation between government and business, Uzbekistan will be able to secure a competitive position in global value chains.

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