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FOREIGN EXPERIENCE IN HANDICRAFT MANAGEMENT AND OPPORTUNITIES FOR ITS APPLICATION IN UZBEKISTAN

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Abstract. This article analyzes the experience of leading countries—Italy, Japan, France, India, China, Türkiye, and Morocco—in managing the handicraft sector through cluster models and examines the opportunities and mechanisms for applying this experience in Uzbekistan. Based on data from Future Market Insights (2026), UNIDO, UNESCO, and national statistical agencies for 2024–2025, the article proposes a strategic roadmap comprising seven cluster models and six key development mechanisms: legal protection through geographical indications, the establishment of a cluster registry, the creation of a digital platform, the introduction of a professional qualification system for artisans, preferential financing, and synergy with the tourism sector. These measures are aimed at transforming Uzbekistan's handicraft sector. The study concludes that Uzbekistan, with its unique cultural heritage—including suzani embroidery, atlas silk, Rishtan ceramics, and Khiva woodcarving—has the potential to increase handicraft exports from USD 65 million to more than USD 268 million by 2030 and raise the sector's contribution to GDP from 2.5% to 7%.

Keywords: handicraft clusters, geographical indications, cluster management, digital platform, export potential, Uzbekistan, Moroccan model, Made in Italy, artisan support policy.

Аннотация. В данной статье анализируется опыт ведущих стран — Италии, Японии, Франции, Индии, Китая, Турции и Марокко — в управлении ремесленным сектором на основе кластерных моделей, а также рассматриваются возможности и механизмы адаптации данного опыта к условиям Узбекистана. На основе данных Future Market Insights (2026), UNIDO, UNESCO и национальных статистических ведомств за 2024–2025 годы предложена стратегическая дорожная карта, включающая семь кластерных моделей и шесть ключевых механизмов развития: правовую защиту посредством географических указаний, формирование реестра кластеров, создание цифровой платформы, внедрение системы профессиональных квалификаций мастеров, предоставление льготного финансирования и развитие синергии с туристской отраслью. Предлагаемые меры направлены на трансформацию ремесленного сектора Узбекистана. По результатам исследования сделан вывод о том, что Узбекистан, обладающий уникальным культурным наследием, включая сюзане, атласный шёлк, ристанскую керамику и хивинскую художественную резьбу по дереву, имеет потенциал увеличить экспорт ремесленной продукции с 65 млн долларов США до более чем 268 млн долларов США к 2030 году, а также повысить вклад данного сектора в валовой внутренний продукт страны с 2,5 до 7%.

Ключевые слова: ремесленные кластеры, географические указания, кластерное управление, цифровая платформа, экспортный потенциал, Узбекистан, марокканская модель, Made in Italy, политика поддержки ремесленников.

INTRODUCTION

The global handicraft market reached approximately USD 850–900 billion in 2024–2025, growing at a compound annual growth rate (CAGR) of 10.5%. This growth has been driven by increasing consumer demand for authentic handmade products and the rapid expansion of e-commerce platforms such as Etsy and Amazon Handmade¹.

Uzbekistan, located at the historic crossroads of the Silk Road, possesses one of the world's richest handicraft traditions, with more than 1,500 years of continuous expertise in embroidery, including suzani and zardozi, silk weaving, particularly atlas and adras, ceramics, notably Rishtan ceramics, and woodcarving, especially the Khiva tradition. Despite this exceptional cultural heritage, the sector contributes only approximately 2.5% to GDP and generates an estimated USD 65 million in annual exports. These indicators remain below the country's considerable potential².

The objective of this article is to systematically analyze foreign cluster management models and adapt their key lessons into practical mechanisms applicable to Uzbekistan. The study is based on official data from

1 Future Market Insights (2026). Handicraft Market Size, Market Forecast and Outlook 2026–2036. 333 p. URL: <https://www.futuremarketinsights.com>

2 O'zbekiston Respublikasi Statistika Agentligi (2025). Sanoat va kichik biznes ko'rsatkichlari. Toshkent. URL: <https://stat.uz>

UNESCO, UNIDO, the India Brand Equity Foundation (IBEF), Japan's Ministry of Economy, Trade and Industry (METI), the Ministry of Handicrafts of Morocco, and Confartigianato of Italy for 2024–2025³.

LITERATURE REVIEW

The theoretical foundation of this study is based on Porter's (1990) cluster competitiveness theory, which demonstrates that geographically concentrated and interconnected firms can achieve competitive advantages that are generally unavailable to isolated producers. This framework was subsequently extended to artisanal production by scholars such as Becattini (2004), who examined Italian industrial districts, and Schmitz (1999), who explored collective efficiency in clusters located in developing countries⁴.

Recent studies have increasingly emphasized the role of digital transformation in the development of handicraft clusters. Rahman et al. (2023) found that the integration of e-commerce platforms increased artisan incomes by 35–60% in South Asian clusters. Bellandi and De Propriis (2022) argued that geographical indications (GIs) serve as indicators of quality and authenticity, enabling certified products to command price premiums of 20–35% compared with non-certified alternatives⁵.

In the context of Uzbekistan, Yusupov and Nazarov (2024) identified several institutional areas requiring further development, including the establishment of a comprehensive GI framework, the creation of a formal cluster registry, and the expansion of digital infrastructure. These factors were highlighted as important conditions for accelerating the growth of handicraft exports. Building on their findings, this article proposes specific improvement mechanisms developed through benchmarking against international best practices⁶.

RESEARCH METHODOLOGY

The study employs a mixed-methods approach combining: (1) systematic comparative analysis of seven country case studies; (2) scoring matrix assessment of management mechanisms on a 1–10 scale; (3) quantitative benchmarking of GDP contribution, export volumes, and cluster counts using official 2024–2025 data; and (4) scenario-based forecasting of Uzbekistan's export and GDP trajectories to 2030. Data sources include national statistical offices, WTTC, ITC, and peer-reviewed journals indexed in Scopus and Web of Science.

ANALYSIS AND RESULTS

Table 1 presents the consolidated performance benchmarks for the seven study countries, extracted from official statistical sources and industry reports. Morocco's 7.0% GDP share stands out as the primary strategic target for Uzbekistan, achieved through a disciplined ten-year national program (2015–2025)⁷ (Table 1).

Table 1. Handicraft Sector Benchmarks: Selected Countries vs Uzbekistan (2024–2025)⁸

Country	GDP Share	Annual Export	Clusters	Artisans	GI System
Italy	4.5%	USD 2.2B+	200+	1.3 mln	Very strong
France	3.5%	USD 0.8B	80+	0.9 mln	Strong
Japan	7.5%*	USD 8B*	241	200,000	Very strong
India	3.0%	USD 3.97B	744	7 mln+	Present
China	4.61%	USD 5B+	2,000+	50 mln+	Present
Turkey	12.5%*	USD 4.2B	150+	3.5 mln	Partial
Morocco	7.0%	USD 0.13B	60+	2.7 mln	Partial
Uzbekistan	2.5%	~USD 65M	~20 inf.	~300,000	Absent

3 UNESCO (2024). Report on Intangible Cultural Heritage: Traditional Craftsmanship. UNESCO Publishing, Paris.

4 Porter, M.E. (1990). The Competitive Advantage of Nations. Free Press, New York, 855 p.

5 Bellandi M., De Propriis L. (2022). Geographical Indications and the Upgrading of Traditional Industrial Districts. Cambridge Journal of Economics, 46(1), pp. 1–21.

6 Yusupov B., Nazarov O. (2024). Institutional Barriers to Handicraft Export Growth in Uzbekistan. Journal of Central Asian Economics, Vol. 5, No. 2, pp. 44–61.

7 Ministère de l'Artisanat du Maroc (2025). Rapport annuel du secteur de l'artisanat marocain 2025. Rabat.

8 Sources: IBEF (2025); Confartigianato (2025); METI (2025); NBS China (2024); Ministère de l'Artisanat du Maroc (2025); O'zbekiston Statistika Agentligi (2025). * Including cultural economy and tourism.

Figure 1 scores Uzbekistan's current handicraft management capabilities across seven key mechanisms and compares them with the 2030 strategic targets. The most critical gaps — Legal Protection (GI system: 1.5/10), Digital Platform (1.0/10), and Export Support (1.5/10) — correspond precisely to the areas where Morocco and India achieved transformational results through targeted policy interventions⁹ (Figure 1).

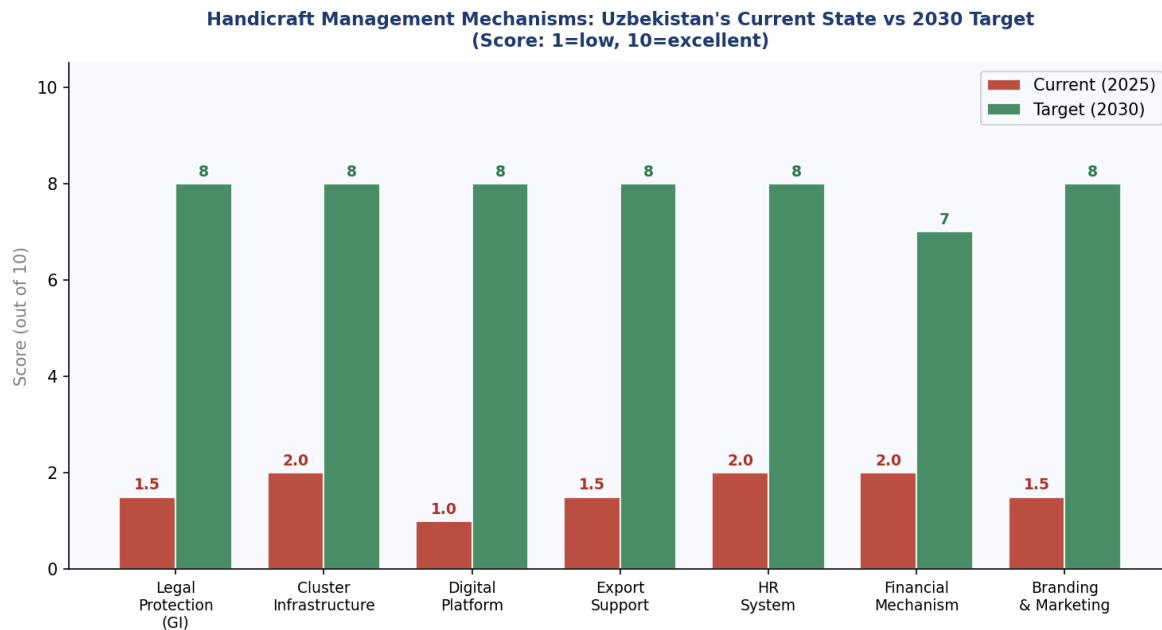


Figure 1. Uzbekistan's Handicraft Management Mechanisms: Current State (2025) vs 2030 Target¹⁰

Drawing on India's 744-cluster model and Morocco's city-hub approach, seven strategic clusters are proposed for Uzbekistan, each benchmarked against a proven foreign counterpart (Table 2). The clusters are geographically distributed to capitalize on existing craft traditions and tourism infrastructure¹¹ (Table 2).

Table 2. Proposed Uzbekistan Handicraft Clusters and Export Targets (2030)¹²

Cluster	Location	Main Products	Export Benchmark	Foreign Analog
Bukhara Embroidery	Bukhara	Zardozi, atlas, adras	USD 45M (2030)	Fez, Morocco
Fergana Silk Weaving	Margilan	Atlas, shoyi, adras	USD 80M (2030)	Varanasi, India
Rishtan Ceramics	Rishtan	Pottery, ceramics	USD 35M (2030)	Jingdezhen, China
Khiva Woodcarving	Khiva	Wood, copper, ganch	USD 28M (2030)	Essaouira, Morocco
Samarkand Cultural Arts	Samarkand	Paper, ceramics	USD 20M (2030)	Suzhou, China
Tashkent Design Hub	Tashkent	Modern crafts, design	USD 60M (2030)	Istanbul, Turkey
Shahrisabz Heritage	Shahrisabz	Mixed heritage crafts	USD 20M (2030)	Marrakesh, Morocco

Figure 2 illustrates the export potential of each proposed cluster. The aggregate target of USD 268+ million by 2030 represents a 4–5x increase from the current baseline of approximately USD 65 million — a growth rate consistent with Morocco's achievement of 3.5x export growth over the 2015–2025 decade¹³ (Figure 2).

⁹ UNIDO (2024). Cluster Development Programme Manual: Methodology and Best Practices. Vienna. URL: <https://www.unido.org>

¹⁰ Compiled by the author based on comparative analysis

¹¹ India Brand Equity Foundation – IBEF (2025). Handicrafts Sector in India. New Delhi. URL: <https://www.ibef.org/industry/handicrafts-india>

¹² Author's development based on: Maison de l'Artisan Maroc (2025); IBEF (2025); China Arts and Crafts Association (2024).

¹³ Maison de l'Artisan Maroc (2025). Rapport sur les clusters artisanaux et les résultats à l'export 2025. Rabat.

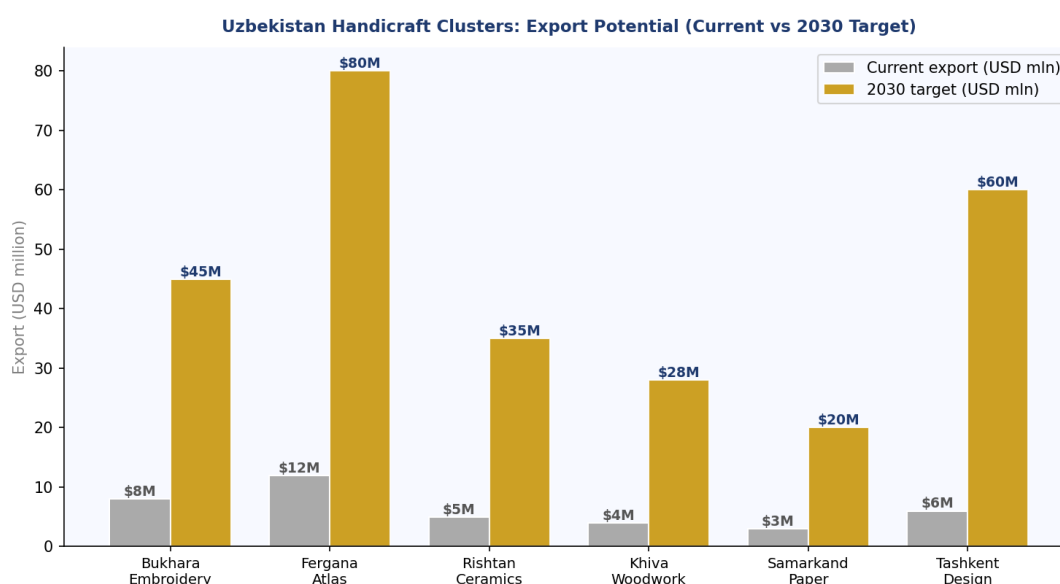


Figure 2. Export Potential of Proposed Uzbekistan Handicraft Clusters: Current vs 2030 Target (USD million)¹⁴

Based on the comparative analysis, six priority mechanisms are proposed, each modeled on proven international approaches:

- Geographical Indications (GI) Law. Drawing on Italy's Decree No. 51/2025 and WIPO guidelines, it is proposed to adopt relevant legislation and register five priority GI products: Bukhara zardozi, Rishtan ceramics, Fergana atlas, Khiva woodcarving, and Samarkand paper. GI certification may enable price premiums of 20–35%.

- National Cluster Registry. Based on India's framework of 744 clusters, it is proposed to formalize seven strategic handicraft clusters by granting them official status and defining their territorial boundaries, specialization, and governance charters.

- Digital Platform "Uzbek Craft." Modeled on China's Taobao Intangible Cultural Heritage section, a national B2C platform should be established with free registration, a zero-commission policy for the first three years, and formal partnerships with Etsy and Amazon Handmade.

- "Master Artisan of Uzbekistan" Title. Following the example of France's *Maîtres d'Art* program, it is proposed to award 15–20 honorary titles annually, accompanied by a three-year state stipend and a mandatory apprenticeship requirement.

- Preferential Financing Package. The proposed financing structure includes 30% state grants, 20% international grants from organizations such as UNDP and UNESCO, 25% private investment, 15% concessional loans, and 10% reinvested export revenue.

- Tourism–Craft Synergy. Based on Turkey's integrated tourism and handicraft development model, cluster visits should be incorporated into official Samarkand–Bukhara–Khiva tourist routes to increase handicraft-related spending among more than three million annual visitors¹⁵.

CONCLUSIONS AND RECOMMENDATIONS

Uzbekistan's handicraft sector is at a strategically important stage of development. The global market is expanding at a compound annual growth rate of 10.5%, consumer demand for authentic and culturally distinctive handmade products continues to increase, and the development of e-commerce has significantly reduced the geographical barriers that previously limited artisans mainly to local markets. Uzbekistan's unique cultural heritage—including suzani embroidery, atlas textiles, and Rishtan ceramics—places the country in a favorable position within the product categories experiencing some of the fastest growth in global demand.

The six mechanisms proposed in this article—legislation on geographical indications, the establishment of a formal cluster registry, the creation of a national digital platform, the introduction of the "Master Artisan of

¹⁴ Author's calculations based on Morocco and India growth benchmarks

¹⁵ Grand View Research (2025). Handicraft Market Size, Share & Trends Analysis Report 2025–2030. URL: <https://www.grandviewresearch.com>

Uzbekistan” title, diversified financing, and integration with the tourism sector—constitute a mutually reinforcing system. Each mechanism can generate measurable results independently, including price premiums through GI certification, broader market access through digital platforms, and increased professional recognition for artisans. Taken together, these measures can contribute to the formation of an institutional ecosystem comparable to those that have supported Morocco in increasing the sector's contribution to GDP to 7% and India in maintaining handicraft exports of USD 3.97 billion.

The full implementation of the proposed measures by 2030 is expected to increase Uzbekistan's handicraft exports to more than USD 268 million and raise the sector's contribution to GDP to 7%. To achieve these targets, it is recommended to ensure the phased introduction of the proposed mechanisms, strengthen coordination among public institutions, artisan associations, financial organizations, tourism entities, and digital platforms, and establish a regular monitoring system based on export growth, employment, artisan income, product certification, and cluster performance indicators.

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