

PROSPECTS FOR UTILIZING TURKISH EXPERIENCE IN ENHANCING MARKETING ACTIVITIES IN THE FOOTWEAR MARKET OF UZBEKISTAN

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Abstract: This article provides a scientific analysis of the prospects for enhancing marketing activities in the Uzbekistan footwear market through the application of Turkish experience. Drawing upon SWOT and PESTEL analytical frameworks, the study conducts a comparative assessment of the footwear industries of both countries. Although Uzbekistan's leather and footwear industry possesses significant development potential, several challenges persist, including weak branding capabilities, limited design innovation, and the absence of competitive marketing strategies. The achievements of the Turkish footwear industry over recent decades-particularly its geographical advantages, flexible production systems, and substantial investments in design and research and development (R&D) - may serve as a strategic model for Uzbekistan. Based on the findings, the article develops evidence-based recommendations aimed at strengthening market segmentation, brand development, digital marketing practices, and export-oriented strategies within Uzbekistan's footwear sector.

Keywords: footwear market, marketing activities, SWOT analysis, PESTEL analysis, Turkish experience, Uzbekistan, branding, export strategy, leather and footwear industry.

1. Introduction

In the contemporary global economy, the footwear industry represents one of the most significant segments of the textile and light manufacturing sectors, occupying an important position within international trade. The global footwear market is expected to maintain a stable growth trajectory in the coming years and is projected to reach USD 335.34 billion by 2032. This expansion is anticipated to be driven by a compound annual growth rate (CAGR) of approximately 3.6% during the 2024–2032 period. For comparison, the global footwear market was valued at USD 243.92 billion in 2023 (Akshay P.).

According to the results of 2024, more than 23.9 billion pairs of footwear were produced worldwide. Furthermore, 88.1% of global footwear exports are concentrated among ten leading exporting countries: China, Vietnam, Indonesia, Germany, India, Türkiye, Belgium, Cambodia, the Netherlands, and Italy. This high degree of market concentration highlights the strategic importance of these countries in shaping global production networks, supply chains, and international trade flows within the footwear industry.

In Uzbekistan, the leather and footwear industry is coordinated through the Uzcharmsanoat Association, which was reorganized in 2018 to consolidate enterprises engaged in the production of leather and footwear products. Although domestic footwear production increased by approximately 4.5 times between 2010 and 2017, the sector remains highly dependent on the export of raw materials and the import of finished products. According to 2022 data, Uzbekistan imported leather footwear worth USD 16.2 million, including imports valued at USD 2.27 million from Türkiye (OEC World, 2022). These figures indicate a pressing need to strengthen domestic production capabilities and optimize marketing frameworks in order to enhance the competitiveness of the national footwear industry.

As one of the world's top ten footwear-producing countries, Türkiye has advanced significantly in the development of its footwear industry. The sector has established strong industrial cluster infrastructures in major cities such as Istanbul, Konya, Izmir, and Gaziantep. In

2023, the industry generated approximately USD 1.2 billion in exports and gained international recognition as a manufacturing hub for global brands (Unsacar, 2025). In this context, Türkiye's experience, particularly its flexible production model, branding strategies, digital transformation initiatives, and investments in design, offers valuable lessons for Uzbekistan.

The primary objective of this article is to develop a scientific framework for enhancing marketing activities in Uzbekistan's footwear market and to identify strategic directions that can be adapted from the Turkish experience. To achieve this objective, the following research tasks were established:

- To analyze the scientific literature on footwear market marketing theories and approaches;
- To conduct SWOT and PESTEL analyses of Uzbekistan's footwear industry;
- To perform a comparative analysis of the Turkish experience;
- To formulate evidence-based recommendations for optimizing marketing activities in

Uzbekistan.

The relevance of this research stems from the fact that the development of the leather and footwear industry and the expansion of exports have become strategic priorities within Uzbekistan's national development agenda. In particular, the "Leather and Footwear Industry Development Program for 2022-2026" has been adopted to accelerate sectoral growth. Under these circumstances, the formulation of scientifically grounded marketing strategies has become increasingly important.

2. Literature Review

An examination of the theoretical foundations and principal approaches to marketing activities reveals that the conceptual framework of marketing in a market economy has been developed by numerous prominent scholars. In 2003, Philip Kotler explained marketing through the 4P framework (Product, Price, Place, and Promotion), which has subsequently been expanded and refined in contemporary academic literature.

Furthermore, M. Porter's three generic strategies, introduced in 1985 and widely recognized as a cornerstone of competitiveness theory, namely: (1) Cost Leadership, (2) Product Differentiation, and (3) Focus on a Target Segment, continue to serve as a fundamental methodological basis for strategic marketing decision-making among participants in the global footwear market.

Turkish researcher Çakıroğlu Başar (2013) investigated the role of design in the competitive strategies of Turkish footwear manufacturing firms and demonstrated that companies pursuing differentiation strategies utilize design as a critical instrument for creating customer value and strengthening brand image. Based on an analysis of ten Turkish footwear companies conducted within the author's doctoral dissertation at Istanbul Technical University (ITU), the study empirically confirmed that a firm's design orientation exerts a direct influence on its competitive performance and market positioning.

Unsacar, in a SWOT analysis of the Turkish footwear industry, identified an integrated production infrastructure, a skilled labor force, a strategically advantageous geographical location, and a flexible manufacturing model as the sector's principal strengths. The author further argued that the industry's primary strategic challenge lies in transitioning from a low-cost manufacturing base to a brand-creating industry capable of generating higher value-added products and stronger international market recognition (Unsacar, 2025).

Within the context of Uzbekistan, Sufian et al. (2023) examined quality management issues in the footwear industry. In addition, several policy documents have established the strategic direction of sectoral development, including Presidential Decree No. 3693 of the Republic of Uzbekistan, issued on May 3, 2018, and the "Leather and Footwear Industry Development

Program for 2022-2026." These regulatory frameworks have played a significant role in shaping the industry's modernization and competitiveness agenda.

The SWOT analysis methodology was originally developed at the Stanford Research Institute during the 1960s and 1970s by Humphrey and was subsequently refined by Weihrich and colleagues in 1982. PESTEL analysis, introduced by Francis J. Aguilar (1967), serves as a macro-environmental assessment tool encompassing Political, Economic, Social, Technological, Environmental, and Legal dimensions. Over time, this framework has evolved into several variants, including PEST, PESTLE, and STEEPLE. Collectively, SWOT and PESTEL analyses have become widely recognized instruments for strategic industry assessment and decision-making (Johnson, Whittington, and Scholes, 2011).

In the field of digital marketing, scholars such as Wind and Mahajan (2001), as well as Chaffey and Ellis-Chadwick (2019), have extensively examined the integration of e-commerce and digital channels into traditional market operations. Concurrently, digital transformation has accelerated significantly across emerging markets. Uz Kurt et al. (2024) demonstrated that small and medium-sized enterprises (SMEs) in Türkiye actively adopted digital technologies during the COVID-19 pandemic, generating positive effects on both production motivation and labor productivity.

From the perspective of marketing within the footwear industries of developing economies, the question of how competitive advantages are created and sustained in the global footwear market has attracted considerable scholarly attention. Bazan and Navas-Alemán (2001) investigated the upgrading processes of footwear industries in developing countries within global value chains, particularly their movement toward higher-value activities such as branding and design. Drawing upon evidence from Portugal, Italy, Brazil, and China, the authors concluded that investment in industrial clusters and integration with educational systems constitute critical determinants of long-term competitiveness.

The Italian experience has also received substantial academic attention due to the country's position as one of the world's leading creators of brand value within the footwear industry. The "Made in Italy" label represents not only superior product quality but also a distinctive design culture and tradition of craftsmanship (Barff and Austen, 1993). Furthermore, the footwear industries of Portugal and Spain have increasingly adopted sustainable materials and EcoBrand-oriented strategies to strengthen international competitiveness and respond to evolving consumer preferences (Unsacar, 2025).

Within the Central Asian context, Bashimov (2021) analyzed the export performance and comparative advantages of the Turkish footwear industry, evaluating its contribution to regional economic growth. The study highlighted that Central Asian countries, including Kazakhstan, Uzbekistan, and Kyrgyzstan, constitute important import markets for Turkish footwear products, reflecting the growing commercial linkages between Türkiye and the region's footwear markets.

3. Research Methodology

This study is based on a comparative analytical methodology that integrates both qualitative and quantitative research approaches. The following data sources were utilized in conducting the research.

First, secondary data were collected and analyzed from multiple sources, including the National Statistics Committee of Uzbekistan (stat.uz), the open-access database of the Uzcharmsanoat Association, publications of the Turkish Footwear Manufacturers Association (TASD), data from the World Trade Organization (WTO) and the Observatory of Economic Complexity (OEC), as well as relevant articles published in academic journals.

Second, a comparative analytical approach was employed. The marketing strategies and organizational structure of the Turkish footwear industry were systematically compared with

those of Uzbekistan's footwear sector in order to identify both common characteristics and structural differences.

Third, the SWOT analysis framework (Strengths, Weaknesses, Opportunities, and Threats) was applied to evaluate the internal strengths and weaknesses of Uzbekistan's footwear industry, as well as the external opportunities and threats affecting its development.

Fourth, a PESTEL analysis (Political, Economic, Social, Technological, Environmental, and Legal) was conducted to assess the influence of the macro-environment on the sector and to identify the key external factors shaping its competitiveness and long-term development prospects.

Several limitations should be acknowledged. The availability of comprehensive statistical data related to the marketing structure of Uzbekistan's footwear market remains limited. Furthermore, specialized sociological studies examining consumer behavior within the domestic footwear market have not yet been conducted on a large scale. Consequently, these limitations highlight important directions for future empirical research and provide a basis for further investigation into market dynamics and consumer preferences within the industry.

4. Analysis and Results

Current State of the Uzbekistan Footwear Market and Industry Performance Indicators An analysis of the current state of Uzbekistan's footwear market and the economic performance of the sector indicates that the leather and footwear industry is primarily concentrated in the regions of Andijan, Namangan, Fergana, Samarkand, and Tashkent, where production activities are predominantly carried out by small and medium-sized enterprises (SMEs). According to official statistical data, while overall industrial production in Uzbekistan increased by 6.8% in 2024, output within the leather and footwear industry declined by 0.6% (Stat.uz, 2024). This divergence suggests the existence of structural challenges that continue to constrain the sector's development and competitiveness.

According to 2022 trade statistics, Uzbekistan exported leather footwear valued at USD 6.71 million, with the principal export destinations being Kyrgyzstan (USD 4.77 million), Kazakhstan (USD 1.50 million), and Russia (USD 0.31 million). Concurrently, the country imported leather footwear worth USD 16.2 million. The leading sources of imports were Italy (USD 7.31 million), Türkiye (USD 2.27 million), and China (USD 1.82 million) (OEC World, 2022).

These figures reveal a significant trade imbalance within the sector, highlighting the continued dependence of the domestic market on imported footwear products, particularly within higher-value and premium market segments. Furthermore, the concentration of exports within neighboring regional markets suggests limited international market diversification and underscores the necessity of strengthening export-oriented marketing strategies.

In 2023, export contracts valued at approximately USD 112 million were signed during the UzCharmExpoEurAsia-2023 exhibition (Kun.uz, 2023), demonstrating growing international interest in Uzbekistan's leather and footwear products. During the same year, Uzbekistan's total exports reached USD 24.4 billion. Moreover, between 2017 and 2022, the leather and footwear industry successfully localized the production of more than 250 product categories, reflecting ongoing efforts to expand domestic value creation and reduce dependence on imported intermediate and finished goods.

Table 1. Key Indicators of Uzbekistan's Footwear Trade (2022)

Indicator	Value	Note
Footwear exports (total)	USD 6.71 million	Primary markets: Kyrgyzstan, Kazakhstan
Footwear imports (total)	USD 16.2 million	Primary suppliers: Italy, Turkey, China

Trade balance	-USD 9.49 million	Negative balance (import surplus)
Imports from Italy	USD 7.31 million	Constitutes 45% of total imports
Imports from Turkey	USD 2.27 million	Constitutes 14% of total imports
Imports from China	USD 1.82 million	Constitutes 11% of total imports

Source: Compiled by the author based on OEC World (2022) data.

Marketing activities within Uzbekistan's footwear market continue to face several significant challenges. First, the market recognition of domestic footwear brands remains relatively low, and many consumers continue to demonstrate a preference for imported products. This situation can largely be attributed to the limited attention that local manufacturers devote to branding investments and long-term brand development strategies.

Second, digital marketing channels have not yet been fully integrated into business operations. Although the establishment of Uzbekistan's national pavilion on the Alibaba platform, including leather and footwear products, and ongoing efforts to expand e-commerce channels represent positive developments, the majority of small-scale manufacturers continue to rely primarily on traditional distribution and sales channels (uzbekistan.org.ua, 2024).

Third, the industry faces a shortage of qualified human capital, particularly in the fields of marketing and design. As emphasized by the country's leadership in December 2024, the leather industry experiences a significant deficit of mid-level specialists, including cutters, seamstresses, and skilled craftsmen, while only 167 specialists are trained annually (Gazeta.uz, 2024). This skills gap constrains innovation, product development, and the implementation of modern marketing practices.

Fourth, linkages between manufacturers and retail distribution networks remain relatively weak. Fragmented and small-scale producers frequently lack the production capacity and standardized quality levels required to establish sustainable partnerships with large retail chains. Consequently, market access and product visibility remain limited for many domestic enterprises.

Marketing Experience and Development Trajectory of the Turkish Footwear Industry An examination of the Turkish footwear industry's development path demonstrates that the sector has achieved substantial growth throughout the Anatolian region, where leather craftsmanship has evolved from long-standing regional traditions into a globally competitive industry. In 2023, Türkiye exported footwear valued at approximately USD 1.2 billion, with Russia, Germany, Iraq, and Saudi Arabia representing its principal export destinations (Shoes-report.com, 2024). Strong industrial clusters have emerged in major production centers such as Istanbul, Konya, Izmir, and Gaziantep.

One of the most significant dimensions of Türkiye's success lies in its branding strategy. Brands such as Hasel, Macro, and Scooter have achieved international recognition and established competitive positions in global markets. According to Çakıroğlu Başar (2013), Turkish footwear companies pursuing differentiation strategies have actively utilized design and branding as strategic instruments for creating customer value and strengthening corporate image.

Furthermore, Unsacar (2025) emphasizes that the Turkish footwear industry's primary competitive advantages stem from its strategic geographical location, providing proximity to Europe, the Middle East, Asia, and Russia, its flexible manufacturing model characterized by low minimum order quantities, and the availability of domestic leather and textile raw materials. Collectively, these factors have enabled Turkish manufacturers to respond rapidly to changing market demands while maintaining international competitiveness.

In 2024, the Turkish government introduced an additional 10% tariff on footwear imports as part of a broader strategy to support domestic producers (La Conceria, 2025). This policy initiative may also be considered a potential legal and economic instrument for strengthening domestic footwear production in Uzbekistan, subject to compliance with international trade obligations and market conditions. Marketing strategies adaptable from the Turkish experience, The marketing strategies implemented within the Turkish footwear industry can be categorized into four principal directions.

The first direction is differentiation and branding. Turkish firms have successfully transitioned from a low-cost manufacturing position toward value-based brand creation. This transformation has been supported by sustained investments in product design, intellectual property protection, and participation in international trade exhibitions. As noted by Unsacar (2025), footwear is increasingly perceived not merely as a basic necessity but also as a fashion accessory, creating substantial opportunities for brand development and value creation.

The second direction is digital transformation and e-commerce integration. The rapid adaptation of Turkish society to emerging technologies and the widespread adoption of digital tools by small and medium-sized enterprises have created favorable conditions for the implementation of innovative production models, including three-dimensional printing technologies and customized manufacturing solutions. This trend is equally relevant for Uzbekistan's footwear industry as it seeks to enhance competitiveness through technological modernization.

The third direction is cluster development and cooperative networks. Türkiye has established strong linkages among universities, vocational education institutions, and industrial enterprises. Specialized industrial zones and manufacturing clusters have been developed in cities such as Istanbul and Konya, fostering collaboration in marketing, innovation, research, and export promotion. These institutional arrangements contribute significantly to the industry's long-term competitiveness and innovation capacity.

The fourth direction is export market diversification. Following disruptions in the Russian market associated with sanctions arising from the Russia-Ukraine conflict, Turkish footwear manufacturers actively expanded into alternative markets, including Saudi Arabia, Iraq, and Western Europe. This strategic diversification reduced market concentration risks and strengthened export resilience. Consequently, this experience offers valuable strategic lessons for Uzbekistan as it seeks to broaden its international market presence and reduce dependence on a limited number of export destinations.

SWOT and PESTEL Assessment of Uzbekistan's Footwear Industry, From a strategic management perspective, the current condition of Uzbekistan's footwear industry and its marketing activities can be comprehensively evaluated through the application of SWOT and PESTEL analytical frameworks. The SWOT analysis of the sector provides the following assessment:

Table 2. SWOT Analysis of Marketing Activities in Uzbekistan's Footwear Industry

STRENGTHS (S)	WEAKNESSES (W)
• Historical traditions of leather-craft artisanship (Fergana, Tashkent, Samarkand) • Availability of domestic raw materials (cattle and sheep hides) • Comparatively low labor costs relative to other countries • Government support programs (2022-2026 development strategy) • Proximity to Central Asian markets	• Brand weakness: domestic brands are not internationally recognized • Inadequate investment in design and R&D • Shortage of qualified marketing specialists (approximately 167 persons annually) • Limited utilization of digital marketing tools

• Emerging regional footwear clusters	• Fragmented small-scale production structure (suboptimal economies of scale) • Dependence on imported finished goods • Weaknesses in standardization and certification systems
OPPORTUNITIES (O)	THREATS (T)
• China's production reorientation away from Russia and Europe's substitution demand • Growth of e-commerce platforms (Alibaba Pavilion, domestic platforms) • International trade fairs and exhibitions (Berlin, Milan, Istanbul) • Investment interest from Turkish, German, and Italian investors • Expansion of population and household income • CIS trade preferences • Opportunity to integrate dual education systems	• Price competition from China and Turkey • Risk of non-compliance with quality standards • Import surplus undermining market segmentation • Brain drain (loss of qualified specialists) • Volatility of raw material prices • Compliance requirements of sustainable fashion trends • Geopolitical instability affecting regional markets

Source: Compiled by the author based on data obtained from OEC World (2022), Stat.uz (2024), Kun.uz (2023), and Gazeta.uz (2024).

The findings derived from the SWOT analysis can be further complemented through a PESTEL assessment of the macro-environmental factors influencing marketing activities within Uzbekistan's footwear industry. Examining the sector through the PESTEL framework provides essential strategic context for managerial decision-making and facilitates a comprehensive understanding of the external forces shaping industry development. Specifically, the analysis evaluates the impact of political, economic, social, technological, environmental, and legal factors on the competitiveness, marketing performance, and long-term growth prospects of Uzbekistan's footwear market.

Table 3. PESTEL Analysis of the Uzbekistan Footwear Market

PESTEL Factor	Core Content	Marketing Significance
Political	Footwear development program (2022-2026); cluster formation policy decisions; export promotion strategy	Government support reinforces marketing investment
Economic	0.6% contraction in the footwear industry in 2024; overall manufacturing sector growth of 6.8%; trade balance deficit	Imperative to improve marketing effectiveness to sustain industry growth
Social	Population growth (37+ million); expanding youth demographic; accelerating urbanization; rising interest in fashion trends	Young consumer segment is highly responsive to brand marketing
Technological	Penetration of digital technologies; growth of e-commerce platforms; availability of 3D design and CAD	Enables transition to digital marketing and e-commerce channels

	technologies	
Environmenta l	Rising global demand for sustainable production; strengthening green standards in European markets	Eco-branding generates new export opportunities
Legal	Import protection measures and trade safeguards; intellectual property protection frameworks; labor legislation	Legal environment shapes marketing expenditure and competitive operating conditions

Source: Compiled by the author based on open sources and official government documents

From this perspective, a comparative analysis of the footwear industries of Uzbekistan and Türkiye, which constitute the primary focus of this study, reveals both transformational differences and common developmental trends within their production systems. Despite operating under distinct economic and industrial conditions, both countries possess considerable potential for expanding footwear production and strengthening their positions within regional and international markets.

In particular, comparative assessments based on key economic and structural indicators that shape the development trajectory of the industry demonstrate substantial differences in competitiveness, production capacity, export performance, branding capabilities, and marketing effectiveness between the two countries. Consequently, the comparative analysis presented in the following table provides a clearer understanding of the relative competitive positions of the footwear industries of Uzbekistan and Türkiye, while highlighting the structural and strategic differences that influence their marketing activities and long-term industry development.

Table 4. Comparative Analysis of the Footwear Industries of Turkey and Uzbekistan

Indicator	Turkey	Uzbekistan
Footwear exports (2023)	~USD 1.2 billion (2023)	~USD 6.71 million (2022)
Primary export markets	Russia, Germany, Iraq, Saudi Arabia	Kyrgyzstan, Kazakhstan, Russia
Manufacturing clusters	Istanbul, Konya, Izmir, Gaziantep	Andijan, Namangan, Fergana, Tashkent
Brand strategy	Strong domestic and international brands	At early stage of brand development (weak)
Digital marketing	Active e-commerce and SMM	At development stage
Education system linkage	University-cluster partnerships	Dual education system under introduction (2024)
Government support	TASD, export promotion fund	Uzcharmsanoat, 2022-2026 program
Sustainable production	Developing (benchmarking Portugal)	Initial stage

Source: Compiled by the author based on Unsacar (2025), OEC World (2022), Shoes-report.com (2024), Stat.uz (2024)

Comparative analysis reveals that Türkiye's export volume is approximately 180 times larger than that of Uzbekistan. However, this disparity is not solely attributable to differences in production scale; qualitative differences in marketing activities also play a decisive role. Turkish footwear firms actively participate in international trade fairs, implement differentiation

strategies, and allocate substantial investments to branding and brand equity development. From a scientific perspective, the adaptation of these practices within the Uzbek context represents a highly relevant area of research.

Based on the structural differences and performance indicators presented above, an examination of the mechanisms for applying Türkiye's experience to Uzbekistan's footwear industry indicates that this process may generate both transformational opportunities and systemic constraints for domestic brands. In particular, the assessment of integration strategies and their associated enabling conditions and barriers suggests that the direct transfer of the Turkish model to Uzbekistan requires careful consideration of multiple contextual factors. From an economic capacity perspective, Türkiye possesses a significantly larger and more diversified economy compared to Uzbekistan. Nevertheless, given that Türkiye's footwear industry in the 1990s shared several similarities with Uzbekistan's current development stage, the application of a comparative analytical framework remains methodologically appropriate.

On the positive side, Uzbekistan possesses a number of strategic advantages, including an available raw material base (leather and textiles), a relatively abundant labor force, strong government policy support, and geographical proximity to Central Asian markets. Furthermore, strong economic relations between Uzbekistan and Türkiye already exist, and Turkish investors have expressed willingness to establish joint ventures for women's footwear production (Xalq so'zi, 2017).

In contrast, key constraints include the weakness of the marketing infrastructure, a shortage of qualified specialists, and an underdeveloped standardization and certification system. While the Turkish footwear industry evolved and matured over several decades, Uzbekistan requires targeted strategic planning in order to accelerate this development trajectory and achieve sustainable competitiveness within a shorter timeframe.

5. Recommendations

Based on the conducted research, an analysis of strategies for improving marketing activities in industry enterprises indicates that the most effective instruments for strengthening market positioning are branding systems and product assortment management mechanisms. In particular, in order to enhance brand equity and expand the value chain, several measures derived from the Turkish experience should be implemented.

The first and most critical strategic priority for Uzbekistan's footwear industry is branding. As emphasized by Unsacar (2025), firm value as a supplier is typically measured by production volume, whereas brand value significantly exceeds supplier-based valuation. Therefore, Uzbek manufacturers must adopt a long-term strategic approach to brand creation and development.

Practical recommendations include: establishing brand schools or brand incubators within the footwear clusters of Tashkent, Samarkand, and Fergana; implementing a state-supported "Made in Uzbekistan" umbrella branding campaign; providing government subsidies for innovative design and patent registration activities; and ensuring the participation of local brands in major international footwear fairs such as GDS Shoe Fair in Berlin, Milan exhibitions, Istanbul trade fairs, and other global industry platforms.

The analysis of digital marketing and e-commerce market dynamics indicates that Uzbekistan is currently experiencing rapid development of its digital economy, which creates substantial opportunities for the footwear industry. The ability of Turkish SMEs to quickly adapt to digital technologies in the post-COVID-19 period has generated a significant competitive advantage (Uzkurt et al., 2024). For Uzbek footwear manufacturers, active participation in e-commerce platforms such as Alibaba, Amazon, Wildberries, and Uzum, alongside the systematic implementation of social media marketing strategies, is of critical strategic importance.

Practical recommendations include the development of an e-commerce roadmap specifically tailored for footwear producers; strengthening product promotion through Instagram, TikTok,

and YouTube; the parallel development of B2B and B2C channels; and the introduction of advanced technologies such as 3D design and virtual try-on systems to enhance customer experience and digital engagement.

With regard to education systems and human capital development, the Turkish model demonstrates that strong coordination between universities and industry ensures a consistent pipeline of highly qualified specialists. In Uzbekistan, the introduction of a dual education system has already begun (Gazeta.uz, 2024), which represents a positive development. However, there remains a clear need to establish specialized academic programs in marketing and design tailored specifically to the footwear industry.

Practical recommendations include the establishment of specialized courses in footwear marketing, design, and branding at technical colleges and higher education institutions in Tashkent, Andijan, and Namangan; the organization of knowledge transfer and exchange programs involving experts from Turkish footwear companies; and a substantial increase in the annual number of graduates in marketing-related fields, from the current level of 167 to more than 500 specialists.

In strengthening export strategies, it is advisable for Uzbekistan's footwear industry to first consolidate its existing export markets, particularly Kyrgyzstan and Kazakhstan, and subsequently expand into Russia, Afghanistan, Iran, and the MENA (Middle East and North Africa) region. Türkiye's overdependence on the Russian market created significant vulnerabilities when disruptions occurred; however, this risk was effectively mitigated through export diversification strategies (Unsacar, 2025). This experience provides an important strategic lesson for Uzbekistan's future export development trajectory.

Practical recommendations include conducting specialized academic research on export-oriented branding strategies and market segmentation; analyzing consumer behavior in Afghanistan and Central Asian markets; directing state export support funds toward the development of footwear brands; and strengthening the international cooperation mechanisms of the Uzcharmsanoat Association.

Cluster infrastructure and cooperative systems also represent an important area of learning from international experience. A key feature of the Turkish model is the development of specialized industrial clusters. The Istanbul, Konya, and Izmir clusters integrate production, supply chains, education, and innovation, thereby generating strong synergy effects within the footwear industry. In Uzbekistan, the establishment of leather and footwear clusters in Sharof Rashidov and Ohangaron districts represents a strategically appropriate development direction (Gazeta.uz, 2024).

Practical recommendations include the creation of dedicated marketing and brand development departments within cluster structures; the establishment of market intelligence systems to support data-driven decision-making; the introduction of subcontracting and specialization mechanisms to enhance cooperation among small firms; and the expansion of co-production arrangements with international brands to strengthen technological transfer and global integration.

6. Conclusion

This study provides a scientifically grounded analysis of strategic directions for enhancing marketing activities in Uzbekistan's footwear market based on the Turkish experience. The findings derived from SWOT and PESTEL analyses lead to the following key conclusions.

The first conclusion is that Uzbekistan's footwear industry possesses several strategic advantages, including a stable raw material base, relatively low labor costs, favorable geographic location, and strong governmental support. However, weaknesses in branding, a shortage of

qualified marketing specialists, and low utilization of digital channels significantly hinder the full realization of the sector's growth potential.

The second conclusion is that the development trajectory of Türkiye's footwear industry demonstrates that sustainable competitiveness requires a transition from a low-cost manufacturing model to a value-driven system based on branding and design. This transformation process has taken several decades in Türkiye; however, it suggests that Uzbekistan has the opportunity to accelerate this transition by adopting targeted strategic policies and learning from international best practices.

The third conclusion is that the improvement of footwear marketing in Uzbekistan requires an integrated, multi-stage approach, including: (1) branding and differentiation strategies; (2) the development of digital marketing infrastructure; (3) alignment of the education system with industry needs; (4) expansion of export geography; and (5) strengthening the marketing function within cluster-based industrial structures.

The fourth conclusion is that the PESTEL analysis indicates that the political and legal environment, particularly the "Leather and Footwear Industry Development Program 2022–2026" and cluster formation policies, has created a favorable institutional foundation for sectoral growth. In addition, the increasing penetration of digital technologies and the openness of the younger population to innovation provide strong enabling conditions for the development of digital marketing practices.

As a limitation of this study, it should be noted that comprehensive empirical data regarding consumer behavior and brand perception in Uzbekistan's footwear market remain insufficient. Therefore, future research is recommended to focus on quantitative studies examining consumer purchasing motivations, brand loyalty, and online purchasing behavior through digital channels in the footwear sector.

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