Foreign experience in the development of the food industry and the possibility of its use in Uzbekistan

Dekhkanova Nilufar* and Galimova Firyuza

1 Introduction

The food industry is one of the largest in terms of the number of employees and the volume of products produced. Its significance lies in the fact that it satisfies one of the basic human needs—the need for food. Everyone needs them, regardless of province or race, therefore, one way or another, the industry is developed in all countries of the world. More food is produced where there are more inhabitants and a sufficiently developed economy for production, and the variety of products is greater where there is a high level of economic development.

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The food industry is closely related to agriculture, which is the main source of raw materials. Its waste is used both in agriculture and in other industries (for example, in light, pharmaceuticals). The efficiency of the food industry is ensured by the products of mechanical engineering, electric power industry, as well as science and education. Another feature of the industry is the need to package products in glass, tin, paper, and polymer containers. This led to a connection not only with mechanical engineering, but also with the glass, metallurgical, pulp and paper, and chemical industries.

Developed countries stand out with a wide variety of high-quality products. Dairy, meat, fish, canning and confectionery industries play a special role here.

Three groups of countries can be distinguished with different character of the development of the processing industry and specific trends in its location. The first group includes countries with developed economies, the second group includes countries of the “Third World” that are diverse and differ greatly in terms of their level of development, and the third group includes countries that have completed the transition to a market economy [1].

The share of the food industry in the structure of the manufacturing industry of the world is about 9%, in developed countries 7.6%, in developing countries 11.8% [2].

2 Materials and methods

This study delves into an analysis of the food industry’s development in foreign countries, employing a mix of general scientific and specialized research methods to address the challenges identified in the research. The research methodology includes the application of various tools such as comparative analysis, economic and statistical grouping of data, tabular methods of economic analysis, graphical methods, and generalization methods.

The study involves comparing the development of the food industry across different foreign countries. This method allows for the identification of trends, variations, and best practices in various regions.

The economic and statistical grouping of data is utilized to organize and categorize information related to the food industry. This method helps in identifying patterns, correlations, and statistical trends that contribute to a comprehensive understanding of the industry’s dynamics.

The use of tables facilitates the systematic organization of economic data, allowing for a structured presentation and analysis of information. This method aids in comparing and contrasting key indicators within the food industry.

Graphical representations, such as charts and graphs, are employed to visually depict trends, patterns, and variations in the development of the food industry. This visual approach enhances the clarity and accessibility of the study’s findings.

The generalization method is utilized to draw overarching conclusions and insights from the specific data and analyses. It involves synthesizing information to generate broader observations and recommendations for the food industry’s development.

By integrating these diverse research methods, the study aims to provide a comprehensive and nuanced analysis of the foreign food industry’s development. The use of both quantitative and qualitative tools ensures a well-rounded understanding of the challenges and opportunities within the sector, laying the groundwork for informed recommendations and strategic insights.

3 Results
The pandemic that began in 2020 and various measures to combat COVID-19 have affected the formation of the world's food resources. The standards and rules of global trade are changing, food security principles are being reassessed, production, logistics and retail are being transformed, new eating habits and food purchasing patterns are emerging. The geography of meat production in the world has undergone significant changes in the second half of the XXth century. This is due, on the one hand, to an increase in the economic development and a corresponding increase in consumption in Europe (about 50% of world exports), Argentina, the USA, Brazil and Australia, and, on the other hand, to the transition of developed countries to the transition of developing countries and, on the other hand, the transition of developed countries to the developing countries and, on the other hand, the transition of developed countries to the developing countries.

### Table 1

<table>
<thead>
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<tbody>
<tr>
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<td>136.8</td>
<td>140.0</td>
<td>142.5</td>
<td>146.0</td>
<td>150.0</td>
<td>154.0</td>
<td>158.0</td>
<td>162.0</td>
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<tr>
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<td>45.2</td>
<td>45.3</td>
<td>45.4</td>
<td>45.5</td>
<td>45.6</td>
<td>45.7</td>
<td>45.8</td>
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</tr>
<tr>
<td>Brazil</td>
<td>35.4</td>
<td>35.5</td>
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<td>35.7</td>
<td>35.8</td>
<td>35.9</td>
<td>36.0</td>
<td>36.1</td>
<td>100.0</td>
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<tr>
<td>Argentina and Uruguay</td>
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<td>25.2</td>
<td>25.3</td>
<td>25.4</td>
<td>25.5</td>
<td>25.6</td>
<td>25.7</td>
<td>25.8</td>
<td>100.0</td>
</tr>
</tbody>
</table>

The difference between the two countries is that China's meat production is mainly for the domestic market, while a significant portion of US meat production (especially chicken) is exported. China alone accounts for about 40 percent of the world's pig meat, while the United States of America accounts for 17 to 18 percent of the world's chicken and cattle production. China and the United States of America are among the top three producers for each of the main types of meat, although the top three producers accounted for 56 percent of world pork production and just over 40 percent of world chicken and cattle production. China and the United States of America are among the top three producers for each of the main types of meat, although the top three producers accounted for 56 percent of world pork production and just over 40 percent of world chicken and cattle production.
World milk production increased by 52.4 percent to 883 million tons in 2019, up 304 million tons from 2000 (Table 2).

Milk production in Asia more than doubled between 2000 and 2019, from 170 million tons to 369 million tons, mainly due to growth in India. In 2019, with an 11 percent share, the United States of America was the second largest producer; the remaining major producers (Pakistan, China, Brazil, Germany, the Russian Federation and France) accounted for 3 to 6 percent of world production. in 2019 with a 42% share of the total, ahead of Asia and Europe (26%), America (23%), Africa (5%) and Oceania (3%). In particular, milk production in China increased by 17 percent in 2019 to 122 million tons, ahead of the United States by 1 million tons in the world, million tons.

In 2020, the top 20 companies paid $77 billion to farmers, $22 billion to enterprise workers, $9 billion to company owners, and another $3 billion to the state in taxes [7]. In 2019, the rating participants increased the share of global production. The top five dairy producers in terms of processed raw materials include companies such as Nestle, Arla Foods, Fonterra and Groupe Lactalis (Table 3). The ranking were Glanbia Group (USA), California Dairies (USA), Danone (France), Agropur (Canada, USA), DMK (Germany, Holland), Müller (Germany, UK), Lepr (France, Switzerland and Lithuania, yoghurts from France and Germany are widely known. The sour cream from Finland and Estonia, cheeses from France, Germany, the Netherlands, France, Pakistan, New Zealand, Russia, Poland, Australia and Ukraine. The main suppliers of dairy products to the world market are the countries of foreign Europe, especially Northern and Central) Europe, Australia and New Zealand, and the main impo...
Table 3. The largest dairy companies in the world.

<table>
<thead>
<tr>
<th>Rank</th>
<th>Company name</th>
<th>Country of origin and main presence</th>
<th>Volume of processed milk, million tons</th>
<th>Estimated revenue per kg of milk, USD</th>
<th>Market share in % of world milk production</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Dairy Farmers of America</td>
<td>USA</td>
<td>28.6</td>
<td>0.6</td>
<td>3.2</td>
</tr>
<tr>
<td>2</td>
<td>Groupe Lactalis</td>
<td>France</td>
<td>21.7</td>
<td>1.1</td>
<td>2.4</td>
</tr>
<tr>
<td>3</td>
<td>Fonterra</td>
<td>New Zealand</td>
<td>18.7</td>
<td>0.7</td>
<td>2.1</td>
</tr>
<tr>
<td>4</td>
<td>Arla Foods</td>
<td>Denmark, Sweden</td>
<td>13.7</td>
<td>0.9</td>
<td>1.5</td>
</tr>
<tr>
<td>5</td>
<td>Nestlé</td>
<td>Switzerland</td>
<td>13.6</td>
<td>1.1</td>
<td>1.5</td>
</tr>
<tr>
<td>6</td>
<td>Friesland Campina</td>
<td>Holland</td>
<td>11.8</td>
<td>1.1</td>
<td>1.3</td>
</tr>
<tr>
<td>7</td>
<td>Saputo</td>
<td>Canada, USA</td>
<td>10.5</td>
<td>1.0</td>
<td>1.2</td>
</tr>
<tr>
<td>8</td>
<td>Amul</td>
<td>India</td>
<td>10.3</td>
<td>0.5</td>
<td>1.2</td>
</tr>
<tr>
<td>9</td>
<td>Yili</td>
<td>China</td>
<td>9.6</td>
<td>1.6</td>
<td>1.1</td>
</tr>
<tr>
<td>10</td>
<td>Mengniu</td>
<td>China</td>
<td>9.0</td>
<td>1.2</td>
<td>1.0</td>
</tr>
</tbody>
</table>

4 Discussion

More than 170 million tons of raw sugar are produced annually in the world, with almost 80% being cane sugar and just over 20% being beet sugar. The world's largest sugar producers are Brazil (about 35 million tons per year) and India (about 27 million tons). Russia is on the 9th place in this list. In developed countries, the production of cane and beet sugar is approximately equal, and in developing countries, about 90% of sugar is made from sugar cane [9].

The largest producers of raw sugar in the world are Brazil, India, China, USA, Australia, Thailand, France, Mexico, Germany, Pakistan and Cuba [9].

An important place in the structure of the food industry is given to butter and cheese production. Cheese production now exceeds butter production. Thus, the world production of cheeses is 42 million tons, butter - 6.1 million tons. Historically, the leading positions in the production of cheese belonged to European countries - France, Switzerland, etc. However, due to the growth in cheese consumption, the positions of North American countries have noticeably increased. The geography of the leading cheese producers is currently represented by the USA, Germany and France. Among the world's main producers of animal oil are India, the USA and New Zealand. The geography of vegetable oil production is quite wide and ubiquitous. However, the highest concentration is typical for Asia. World production is 178.3 million tons, of which Indonesia, Malaysia and the United States account for 46%.

If we characterize the processing industry in Europe, we can say that this is one of the oldest provinces of the world with a high level of economic development, in which the processing industry is the basis in almost all countries. The food industry in Germany is engaged in the processing of agricultural products and is represented by winemaking, brewing and other processed products.

In the countries of Western Europe and the United States, high results have been achieved in the agri-food sector of the economy due to the constant economic support by the government [10]. The food and flavor industry have received great development in the United States. The share of the industry in the country's conditionally net manufacturing products is 12%. The most important processing industries in the United States include meat, dairy, alcoholic and non-alcoholic beverages, canning and flour milling. In connection with the rise in food prices in the United States, much attention is paid to the production of various kinds of substitutes for natural products [3].

The location of the processing industry throughout the country as a whole is relatively uniform. Large cities, as a rule, are also the leading centers of the industry. However, there are areas of concentration of milling enterprises in the Northwest Center and along the coast.

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of the Great Lakes (leading centers: Minneapolis-St. Paul, Kansas City, Buffalo); meat industry in Chicago, Kansas City and Omaha (Nebraska); dairy and cheese in the states of Wisconsin and Minnesota; cannery in California. The largest centers for the production of confectionery are New York and Chicago; whiskey—Louisville (Kentucky); Coca-Cola—Atlanta [6].

The production of canned vegetables and fruit juices is concentrated in the West (California) and in the South (Florida). Breweries using recipes from German brewers were established in Wisconsin, Missouri, and Colorado.

The tobacco industry is confined to specialized tobacco growing areas in Virginia and North Carolina. The production of cigarettes is mainly concentrated within Piedmont and Kentucky. The main centers are Greensboro—Winston—Salem—High Point and Durham in North Carolina, Richmond in Virginia and Louisville in Kentucky. The production of cigars from American tobacco is concentrated in the Northeast (the main center is Philadelphia) [3].

The Canadian food industry is of interest. In terms of total production value, the food and beverage industry are the second largest manufacturing industry in Canada, accounting for 17% of total manufacturing sales and 2% of national gross domestic product in 2019 [11]. It was the largest manufacturing employer in 2019, employing 290,000 people. The production of meat products was the largest sub-sector of this industry, accounting for 25% of all production sales, followed by the production of dairy products (12.3%).

The Canadian food industry is a highly innovative industry. The vast majority of businesses in the industry (72%) introduced product, process, organization, or marketing innovation between FY 2016 and 2018, and almost half introduced process innovation (48%) [12].

The industry of developing China is undoubtedly one of the most developed in terms of the total number of industrial enterprises and the number of workers employed in them, the country ranks first in the world. Heavy industry is the backbone of the country's economy. In China's food industry, most of the enterprises are located in the southwest of the country. This industry in the country is also very developed—China has been fully meeting its food needs since the 80s of the last century, despite the huge size of its domestic market. Today, the country is a major exporter of seafood and fish, as well as fruits and vegetables. The tea industry is historically developed—since the 19th century, China has not lost its status as one of the main suppliers of tea. The enterprises of the tea industry are located mainly historically, since the collected raw materials must be immediately processed, which is done at already built factories.

Japan is a country with a very highly developed industry. Despite its small territory, Japan produces up to 12% of the world's industrial goods. Food production in Japan operates mainly on imported raw materials, since there are no opportunities and resources in the country to produce its own. Japan is one of the world's largest food exporters. The country specializes in the production of sugar. Also, in Japan, there is a demand for organic products and healthy eating [13].

South Korea is subject to Japanese economic influence. But despite this, the country still exports various food products. Actively processes sugar, production of alcoholic beverages has been established. In addition to Korean beer, various varieties of grape wines and other drinks made according to Western recipes are on the shelves. Crop production is highly developed in South Korea, as it is the basis of agriculture. The country also produces seafood. Most of the total catch is exported [3].

As a rule, almost all types of food industry are represented in developed countries, and in developing countries, the export industries of the food industry are still the most important, and the range of food products is much smaller. In general, the location of the food industry in the world is characterized by a number of opposite trends. On the one hand, traditional, “classic” industries are still growing in less
developed countries (to a certain extent, these countries repeat the development of the global food industry at an early stage). On the other hand, in highly developed countries, their reduction is noted (this is especially true for industries that are harmful to health). Thus, the tobacco industry is moving from highly developed countries to less developed ones. The same process takes place in the sugar industry. In highly developed countries, wine production is declining and the growth of beer production has stopped, in developing countries the picture is reversed.

In highly developed countries, there is an increase in the production of various semi-finished products, something like the "industrialization of the kitchen", focused on the "liberation" of women from cooking. It is these industries that are leaders in the development of the food industry in highly developed countries. At the same time, in developing countries, the importance of the canning industry is growing, oriented to the market of highly developed countries, where numerous juices, canned fruits, less meat and fish products are supplied.

Flour-grinding, sugar, cereal industries are also developed in developing countries, indicating the predominance of food of plant origin. In the future, the transfer of "obsolete", "harmful" and labor-intensive industries from developed countries to less developed countries will continue. This will contribute to the "spreading" of most industries in various provinces of the world. An increase in the share of Asian countries, primarily East and Southeast, in the total volume of industrial production is expected. There are two trends in the sectoral structure of the industry that complement each other. On the one hand, industries will continue to "split up" into sub-sectors and production, on the other hand, their interconnection and interdependence will increase. The analysis shows that most of the goods we purchase are produced by only ten of the most influential global corporations: the Swiss company Nestlé, the American companies Cargil, PepsiCo, Kraft Foods, Coca-Cola, Kellogg's, Mars, General Mills, the British company Unilever. Each of the food TNCs, as a rule, controls its own market niche, where it opposes not so much its competing corporations as local producers. It is worth noting that foreign companies successfully compete with domestic ones due to efficient technologies, access to long-term capital, a well-thought-out strategy, huge marketing budgets, extensive work experience, high-quality logistics and brand portfolio, competitive management, expansion support from their states, and a considerable lobbying resource.

Forbes magazine has published a new version of the Global 2000 rating [14], which includes the largest companies in the world. The ranking includes the world's giants in the food industry, beverages and tobacco. The top three and, accordingly, the top hundreds of the list include the Swiss corporation Nestlé (39th place), the American PepsiCo (70th place) - one of the world's largest producers of soft drinks and food products, as well as the British transnational company British American Tobacco, which produces cigarettes, tobacco and other nicotine products (81st). It is worth noting the American company Coca-Cola, which is the world's largest manufacturer and supplier of concentrates, syrups and soft drinks (102nd place) (Table 4) [15]. Among food companies, European, American and Chinese enterprises are in the lead.

The experience of developed countries confirms that at present, the effective development of food industry enterprises can be achieved through the development of clusters. The cluster-based economy is a model of a competitive and investment-attractive economy that provides a high level and quality of life for the population and involves not only large enterprises in the province, but also small businesses in the production process. In such foreign countries as the USA, Canada, Finland, Belgium, France, Italy, the Netherlands, Germany, Bulgaria, Hungary and Austria, food production clusters have been formed that are successfully functioning and allow us to judge not only the need to form clusters, but also the effectiveness their work, both on the part of the cluster members, and within the province and the country as a whole.
Table 4. The largest food companies in the world according to the Global 2000 rating in 2021 [16]

<table>
<thead>
<tr>
<th>Rank</th>
<th>Name</th>
<th>Country</th>
<th>Sales</th>
<th>Revenue</th>
<th>Assets</th>
<th>Market Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>39</td>
<td>Nestlé</td>
<td>Switzerland</td>
<td>$89.9 B</td>
<td>$13 B</td>
<td>$140.3 B</td>
<td>$333.2 B</td>
</tr>
<tr>
<td>70</td>
<td>PepsiCo</td>
<td>United States</td>
<td>$71.3 B</td>
<td>$7.5 B</td>
<td>$91.2 B</td>
<td>$199.2 B</td>
</tr>
<tr>
<td>81</td>
<td>British American Tobacco</td>
<td>United States</td>
<td>$33.1 B</td>
<td>$8.2 B</td>
<td>$188.2 B</td>
<td>$91.6 B</td>
</tr>
<tr>
<td>102</td>
<td>Coca-Cola</td>
<td>United States</td>
<td>$33 B</td>
<td>$7.7 B</td>
<td>$87.3 B</td>
<td>$231.3 B</td>
</tr>
<tr>
<td>174</td>
<td>Philip Morris International</td>
<td>United States</td>
<td>$28.7 B</td>
<td>$8 B</td>
<td>$44.8 B</td>
<td>$144.8 B</td>
</tr>
<tr>
<td>176</td>
<td>Mondelez International</td>
<td>United States</td>
<td>$26.6 B</td>
<td>$3.6 B</td>
<td>$67.8 B</td>
<td>$82.6 B</td>
</tr>
<tr>
<td>216</td>
<td>Altria Group</td>
<td>United States</td>
<td>$20.8 B</td>
<td>$4.5 B</td>
<td>$47.4 B</td>
<td>$96.9 B</td>
</tr>
<tr>
<td>238</td>
<td>Danone</td>
<td>France</td>
<td>$26.9 B</td>
<td>$2.2 B</td>
<td>$52.3 B</td>
<td>$46.4 B</td>
</tr>
<tr>
<td>247</td>
<td>Archer Daniels Midland</td>
<td>United States</td>
<td>$64.4 B</td>
<td>$1.8 B</td>
<td>$49.7 B</td>
<td>$33.2 B</td>
</tr>
<tr>
<td>264</td>
<td>Kweichow Moutai</td>
<td>China</td>
<td>$12.2 B</td>
<td>$6.8 B</td>
<td>$32.6 B</td>
<td>$395.8 B</td>
</tr>
</tbody>
</table>

It should be noted that the most successful example of the US cluster strategy is the California wine cluster, which is an example of successful commercial activity of enterprises producing the same type of products. It includes a network of small wineries, many independent grape producers and industries and companies that support the grape business. This wine cluster is connected with other Californian clusters - agricultural, food, restaurant.

The Canadian economy is characterized by many successful high-tech cluster models, such as the wine cluster (Niagara); food industry cluster (Toronto). State support for the development of clusters in Canada is carried out at all levels of government - federal, provincial and municipal. Support for clusters at the federal level is expressed in the fact that the Government of Canada implements a policy to attract investment, assists in the sale of company products in foreign markets, regulates the labor market and invests in promising research and development, creates educational programs, and protects intellectual property.

In the formation of the food cluster in Lower Austria (Austria), a significant role was played by the national innovation and research program, the key factors of which were the policy of stimulating the development of ties between research institutions and sectors of the economy (including agro-industrial), the reduction of regulatory barriers in innovation programs and the formation of centers of competitiveness. The food cluster of Lower Austria includes the production of high quality and safe products; innovative methods of food processing, the use of the latest food technologies; and the production and marketing of provincial and organic products. The purpose of the cluster is to promote existing national competencies in the field of food production, technology and marketing, as well as to create networks between industry participants. These activities will help companies remain economically viable in the long term and increase their international competitiveness.

In order to achieve its goals, the Lower Austria Food Cluster initiates and coordinates cooperation focused on food quality, food safety, and organic and provincial products, both between companies and between companies and R&D facilities. The target groups of the cluster include food industry enterprises along the entire value chain: agricultural production, food processing, trade and industry, retail and wholesale of food, manufacturers of machinery and equipment for the food industry, cleaning products, pest control, packaging R&D, laboratories, consultants and much more [16, 17].

Germany's strong economy is built on a network of "clusters" - groups of firms and research institutes with a common focus that use their provincial proximity to support each other and innovate. foodRegio is a Northern German food industry network founded in 2006 and made up of member companies from the five northern states of Germany. The focus is on mid-sized companies and supporting organizations in the food value chain. In 2010 foodRegio...
and Beltfood created a network of food clusters throughout the Baltic Sea province. The focus of the activity is on the exchange of innovative processes and products in the food industry. Together with three other German food chains, foodRegio has joined forces to form the German Food Cluster, further increasing its international visibility.

The food industry cluster Brandenburg (Germany) produces Spreewald gherkins, Eberswalder sausages, Belitzer asparagus, Werderaner ketchup, Prignitzer corn flakes, Werder fruits and vegetables. To further enhance this success in global competition, food industry cluster management works hand in hand with companies, universities, research institutes and associations.

Food Metro Cluster in the southeast of the Netherlands - development of innovative ways of producing protein products, including resource saving, vertical and horizontal integration, and rational organization of space.

In all European states, national cluster programs are financed mainly from the funds of national ministries, and all programs - from provincial budgets. The share of countries where cluster programs are financed by private business is insignificant. In all states, specially created organizations and private agencies are responsible for the implementation of cluster policy.

Foreign experience of using the cluster approach in relation to the management of the development of the territory is very diverse. Analyzing the practice of applying the cluster approach in developed and developing countries with market economies, we can conclude that there are no common generally accepted approaches and schemes for the creation and functioning of clusters. Each state develops its own approaches to the formation of clusters and their management, and in its own way organizes the activities of state bodies responsible for the implementation of the national industrial strategy for the competitiveness of the territory.

5 Conclusions

- The use of the cluster approach is a natural stage in the development of the economy, and its ubiquity can be considered as the main feature of all highly developed economies;
- The specifics of the cluster is the receipt by the organizations included in it of a synergistic effect, expressed in an increase in the competitiveness of the entire system in comparison with individual economic entities;
- A distinctive feature of the cluster is its innovative focus;
- The implementation of the cluster policy is based on the organization of interaction between public authorities and local governments, business and scientific and educational institutions to coordinate efforts to increase the innovativeness of production and the service sector, which contributes to mutual improvement and increase in efficiency in work.

Based on the analysis of foreign experience, it is proposed to create an innovative cluster of food industry enterprises in the Tashkent province. When forming a cluster, on the one hand, an active role of the province itself and provincial companies in the formation of a cluster is assumed, on the other hand, support for cluster initiatives from the state.

References
