

## Agrifood trade in Tajikistan

Parviz Khakimov, Timur Ashurov, Jovidon Aliev, and Manuchehr Goibov

Despite being an agrarian economy, Tajikistan heavily relies on agrifood imports. Agrifood imports have increased sharply in recent years, while export growth has been modest. This brief outlines the key trends in Tajikistan's agrifood trade and provides policy recommendations to reduce import dependence and boost domestic agricultural production.

### Key trends in agrifood trade

- Between 2000 and 2023, Tajikistan's agrifood imports grew 16 times, with vegetable products (primarily cereals) and prepared foodstuffs (sugar, animal fodder, flour, oil) accounting for 83 percent of total imports.
- While imports have surged, agrifood exports have grown by only 2.2 times during the same period. Exports remain concentrated in a few products, with dry fruits and nuts making up 75 percent of total agrifood exports in 2023.
- Processed food imports have significantly increased, reflecting both changing consumer preferences and domestic production gaps. This shift, particularly in urban areas, underscores the growing role of imports in meeting demand for food products beyond basic staples.
- Tajikistan's agrifood imports and exports are dominated by trade with Commonwealth of Independent States (CIS) countries. These long-standing trade ties reflect logistical advantages and shared histories. However, this reliance on a narrow set of trading partners limits the potential to access new, more lucrative markets.

### Recommended actions

- Tajikistan needs to focus on modernizing its agricultural sector to raise productivity and lessening the country's reliance on imports.
- Strengthening Tajikistan's agrifood processing sector will help reduce the growing dependency on processed food imports. Investments in food processing infrastructure and the promotion of local agribusinesses could meet the rising demand for processed products.
- Diversifying the range of exported agrifood products is crucial. Developing processing industries and value-added products can help reduce dependency on a few commodities and open doors to new export markets.
- While CIS countries are important trading partners, Tajikistan should explore opportunities to expand market access outside the region. Improving the quality of agrifood exports and meeting international standards will enable the country to participate in more global value chains and trade agreements.

### Introduction

Tajikistan became a full-fledged member of the WTO in March 2013, and is part of several other multilateral free trade agreements, including the CIS, the Economic Cooperation Organization (ECO), and the Central Asia Regional Economic Cooperation (CAREC). The country also has bilateral trade agreements with most CIS countries as well as with Afghanistan, China, Iran, Pakistan, and Turkey (Khakimov et al. 2014a).

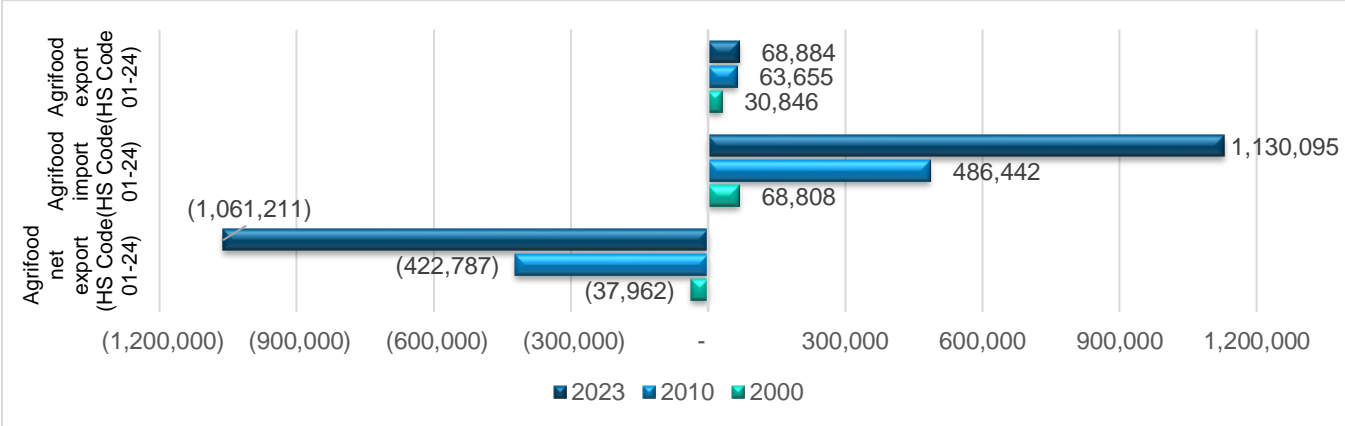
Regardless of the significant increase in crop and livestock production, Tajikistan remains a net importer of agrifood products, and the gap between agrifood exports and imports has increased significantly due to growing domestic demand accelerated by population and income growth.

What follows is a summary of the findings from a forthcoming discussion paper<sup>1</sup>.

### Agrifood trade

Though Tajikistan is an agrarian economy, the share of its food imports on average, between 2016 and 2022 was 22.4 percent of goods imports. For the same period, food exports as a percentage of total goods exports was 3 percent (WB, WDI, June 2024). Agrifood imports and exports increased by 16 and 2 times, respectively, in 2023 compared with 2000 (Figure 1).

**Figure 1. Agrifood net exports, US\$1,000**

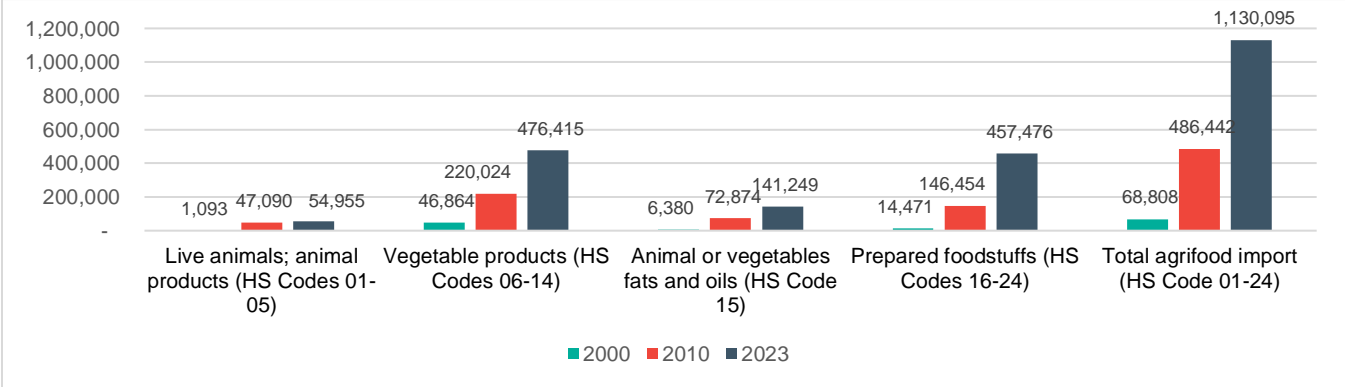


Source: Authors' compilation based on Customs Service under the Government of the Republic of Tajikistan Statistics

### Agrifood Imports

A deep dive into agrifood imports by types reveals that the most significant agrifood import increases were due to growth in vegetable product imports (HS Codes 06-14, mainly cereals) and prepared foodstuffs (HS Codes 16-24). Vegetable products (mainly cereals) and prepared foodstuffs (mainly sugar, prepared animal fodder, and flour) constituted 75 percent and 83 percent of total imports in 2000 and 2023, respectively (Figure 2).

**Figure 2. Agrifood imports, US\$1,000**



Source: Authors' compilation based on Customs Service under the Government of the Republic of Tajikistan Statistics

<sup>1</sup> Khakimov P., Ashurov T., Goibov M., and Aliev J. Tajikistan's Agrifood Sector Review, IFPRI Discussion Paper (forthcoming, January 2025).

The share of agrifood imports in total imports between 2000 and 2023, on average, was 18 percent and increased significantly in the last 8 years.

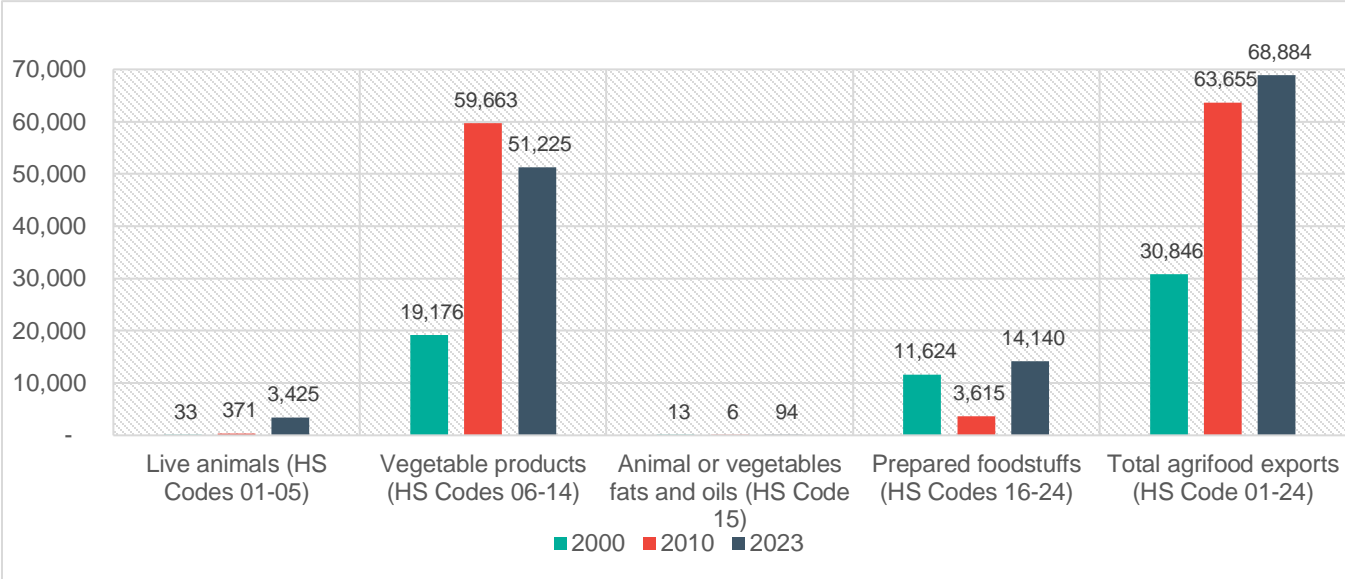
A review of agrifood imports reveals that CIS countries were Tajikistan’s main trading partners in 2000, 2010 and 2023, though there were some shifts in their share of product group types (Customs Service under the Government of the Republic of Tajikistan 2024).

**Agrifood Exports**

In contrast to agrifood imports, agrifood export increases were modest, increasing 2.2 times by 2023 compared with 2000 (Customs Service under the Government of the Republic of Tajikistan 2024).

The export of vegetable products (HS Codes 06-14) and prepared foodstuffs (HS Codes 16-24) together constitute 95 percent of total agrifood exports in 2023 (Figure 3). A deep dive at the commodity level shows that 75 percent of the total exports in 2023 was edible fruits and nuts and peel of citrus fruits or melons (HS Code 08, mainly dry fruits and nuts).

**Figure 3. Agrifood exports, US\$1,000**



**Source:** Authors’ compilation based on Customs Service under the Government of the Republic of Tajikistan Statistics.

The main destinations of Tajikistan’s agrifood exports in 2000, 2010 and 2023 were CIS countries, except for the export of animal or vegetable fats and oils (HS Code 15). Agrifood exports’ share of total exports was small: 3.9 percent, on average, between 2000 and 2023 (Customs Service under the Government of the Republic of Tajikistan statistics 2024).

**Impact of sector public support on agrifood trade**

Incentives for the poultry and fisheries subsectors introduced by the Government of Tajikistan for the 2018–2022 period impacted net trade of these commodities in recent years. Policy impacts can be summarized as follows: Import of edible eggs stopped; import of hatching eggs dropped by 39 percent; import of day-old chicks climbed by 4.5 times; import volume and import value of poultry meat dropped by 12.5 and 19.4 times, respectively; and import volume and import value of fish dropped by 5.0 and 3.6 times, respectively (Ministry of Agriculture 2023).

**Agrifood Trade Statistics**

There is a concern regarding the accuracy of trade data. Availability and reliability of agrifood international trade data are crucial to understanding total domestic demand (production minus exports plus imports) and consumption of each agrifood product. For our analysis, we compared Tajik Customs Service data with FAOSTAT mirror statistics data (reported by Tajikistan’s trade partners) for agrifood products. A comparison of the two data sources for the same types of products reveals that Tajik’s agrifood export values, as reported by Tajikistan’s trade partners, are 1.8 times higher, on average, than the Customs Service data for the reported periods. The same is true for Tajikistan’s agrifood import values for 2000 and 2005. However, agrifood import values for 2010, 2015, and 2020, reported by Tajikistan’s trading partners, are 30 percent lower, on average, than the officially reported data from Tajikistan’s Customs Service.

Because the discrepancies in trade statistics are significant, further examination is needed at the commodity level and by trading partners. Data on food per capita consumption by types of products and food and commodity balance sheets

enable us to estimate agrifood exports and imports. In addition, re-exports and re-imports likely occur, which are reported as actual exports and imports. This topic requires further in-depth analysis.

## Looking ahead

Tajikistan's agrifood trade has undergone significant changes over the past two decades. Despite being an agrarian economy, the country remains heavily reliant on imports of key commodities such as cereals and prepared foodstuffs, and this reliance has grown over time. At the same time, agrifood exports, though increasing, remain modest and concentrated on a few key products like dry fruits and nuts. The country's agrifood trade is dominated by its relationships with CIS countries, although there are signs of diversification in both import sources and export destinations.

While recent policies aimed at reducing import dependence in sectors like poultry and fisheries have shown positive results, more needs to be done to address the structural issues that continue to hinder the development of a self-sufficient and competitive agricultural sector. A deeper analysis of trade data, improved reporting mechanisms, and targeted investments in the agricultural sector will be critical to ensuring the long-term sustainability and resilience of Tajikistan's agrifood trade.

---

## ACKNOWLEDGMENTS

Funding for this work was provided by the United States Agency for International Development (USAID) through the Tajikistan Evaluation and Analysis Activity. The support and contributions from USAID Mission to Tajikistan and various USAID-supported projects are gratefully acknowledged. The IFPRI team thanks the Tajik Academy of Agricultural Sciences (TAAS), specifically the Institute of Economic and System Analysis of Agriculture Development (IESAAD) for their support. Any opinions expressed here belong to the author(s) and are not necessarily representative of or endorsed by IFPRI, USAID, IESAAD or TAAS.

---

## ABOUT THE AUTHORS

Parviz Khakimov ([p.khakimov@cgjar.org](mailto:p.khakimov@cgjar.org)), Senior Research Fellow, Development Strategies and Governance Unit, International Food Policy Research Institute (IFPRI), based in Dushanbe, Tajikistan.

Timur Ashurov ([t.ashurov@cgjar.org](mailto:t.ashurov@cgjar.org)), Research Assistant, Development Strategies and Governance Unit, IFPRI Office in Dushanbe, Tajikistan

Jovidon Aliev ([j.aliev@cgjar.org](mailto:j.aliev@cgjar.org)), Senior Research Analyst, Development Strategies and Governance Unit, IFPRI Office in Dushanbe, Tajikistan

Manuchehr Goibov ([goibovm@yahoo.com](mailto:goibovm@yahoo.com)), Head of Innovation Department of Economic and System Analysis of Agriculture Development (IESAAD) of Tajik Academy of Agricultural Sciences (TAAS), based in Dushanbe, Tajikistan.