



Asia-Pacific Trade Briefs

Tajikistan

Merchandise trade: Merchandise exports in 2014 fell by -7.2%, compared with the 5-year annual average of -5.2%. With a low level of product diversification and heavy reliance upon natural resources, the Tajik economy is especially susceptible to volatile commodity prices. Exports are diversified across only 57 products and 21 markets – compared to the Asia-Pacific average of 2,107 products and 95 trading partners. Aluminium, gold and cotton are the main export products. The leading export partners are China, the Russian Federation and Kazakhstan, which together account for more than three-quarters of Tajikistan’s exports (80%). Merchandise imports grew by 8.4% in 2014, compared with a 5-year annual average of 14.1%. Major imported products are petroleum oils and wheat, and its major import partners are Kazakhstan, Turkey, and Switzerland.

Services trade: The main components of services exports are transportation, telecommunications, and business services. Both services exports and imports fell substantially by -32.7% and -25.8% respectively in 2014. This is in contrast with 5-year average annual growth rates of 5.6% and 10.8%.

Global value chains (GVCs): The share of intermediate goods in trade – a proxy for participation in GVCs – in Tajikistan (21%) is about the same as the Asia-Pacific overall (22%) for imports, and much higher in Tajikistan (48%) than the Asia-Pacific (18%) for exports. Tajikistan has a relatively low level of participation in GVCs as it primarily imports final goods such as petroleum oils and wheats. However, as an exporter, it has a moderate level of participation in GVCs as it mainly exports intermediate goods such as metals and ores such as aluminium, gold, zinc, and lead as well as agriculture products like cotton.

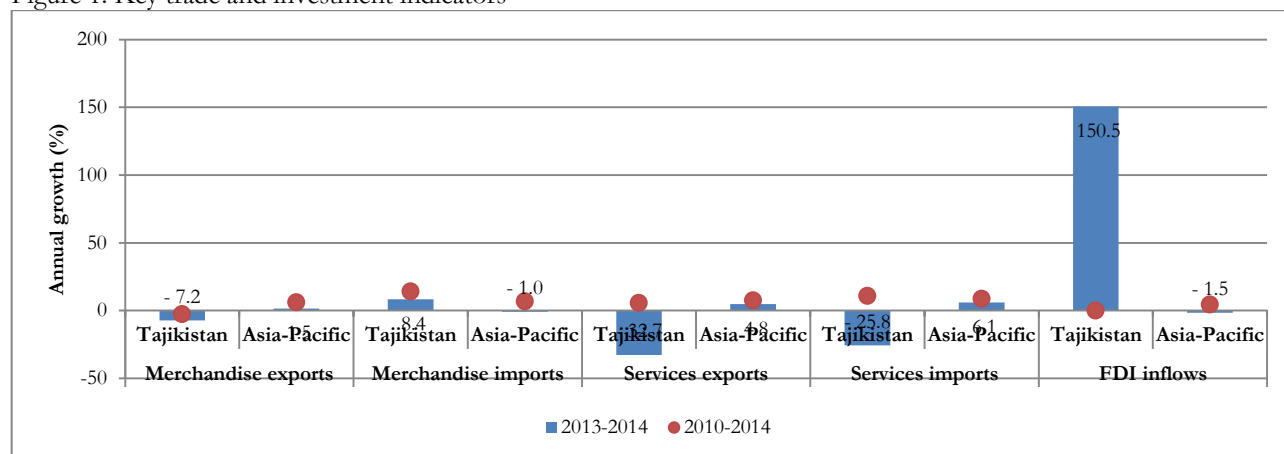
Foreign direct investment (FDI): In 2014, Tajikistan’s FDI inflows were double the 2013 level, at around \$263 million. Tajikistan offers a favourable climate to regional and cross-border investment, and the government has emphasised FDI for the development of new industrial activities, as well as for modernising existing ones. Aluminium, cotton and energy are the sectors that currently attract most foreign investment. Tourism is also emerging as a potential growth sector. China, Russia, Qatar, Great Britain, Turkey and Iran were the leading sources of FDI. Russia has notably invested in the construction of medium capacity hydroelectric central power plants and in the banking sector.

Tariffs: Average MFN applied and effective tariffs at 7.6% and 5.4% are similar to the Asia-Pacific averages of 7.4% and 7.4% respectively.

Trade costs: Intraregional trade costs in Tajikistan slightly fell from 2013 levels. However, it is still costlier for Asia-Pacific economies to trade with the Tajikistan than with the East Asia-3 (China, Japan and Republic of Korea) – the intraregional benchmark – and with the EU-3 (France, Germany and United Kingdom) – the extraregional benchmark. Based on the UNRC Survey 2015*, Tajikistan’s trade facilitation and paperless trade implementation score is at 49%, compared to 46.5% for the Asia-Pacific.

Trade agreements: Tajikistan has 9 trade agreements in force, slightly higher than the Asia-Pacific average of 7 agreements. Fifty-four per cent of exports are to PTA partners, compared to 35% for the Asia-Pacific. Forty-one per cent of imports are from PTA partners, compared to 45% for the Asia-Pacific region.

Figure 1. Key trade and investment indicators



*Country notes summarising results of the UNRC Survey 2015 are available at: <http://unnex.unescap.org/UNTFSurvey2015.asp>

Figure 2. Top merchandise markets

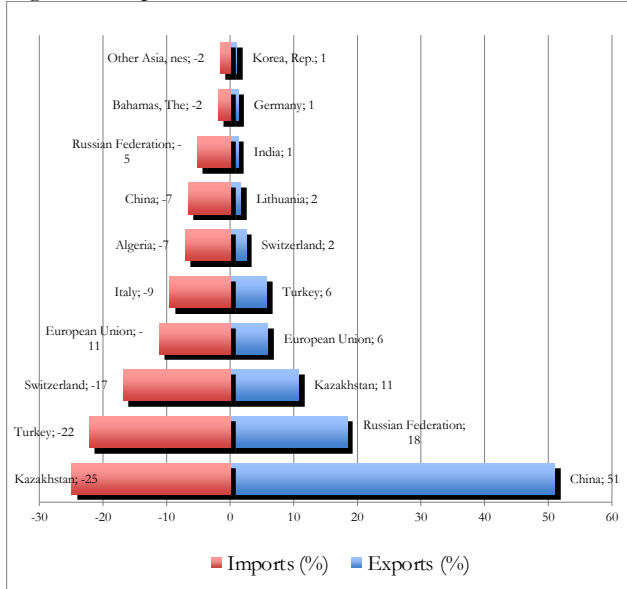


Figure 3. Top merchandise products

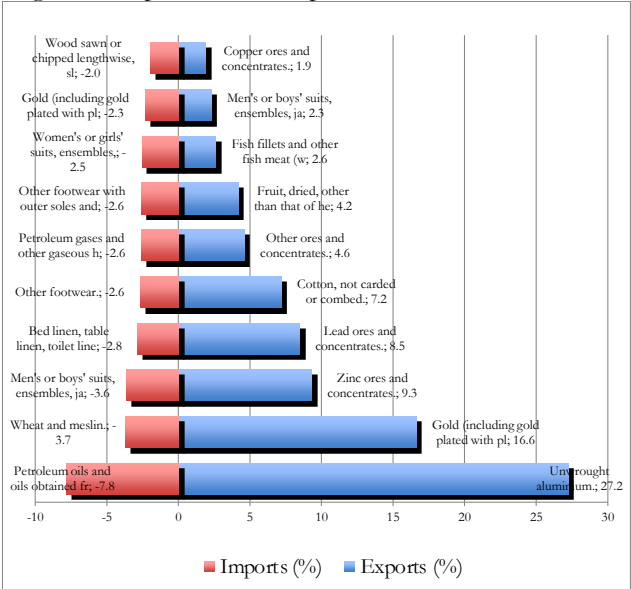


Figure 4. Trade in goods by their use

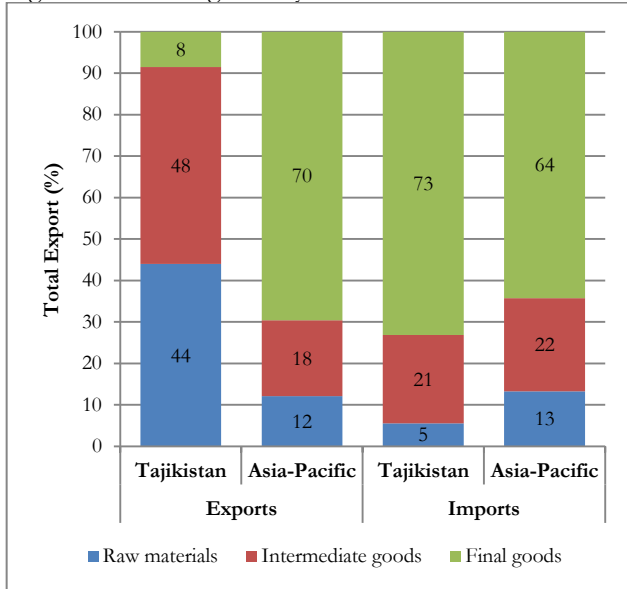


Figure 5. Foreign direct investment

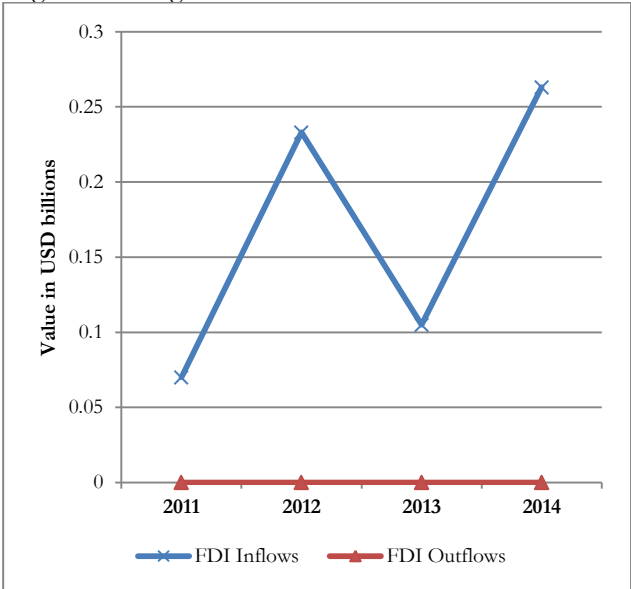


Figure 6. Tariffs

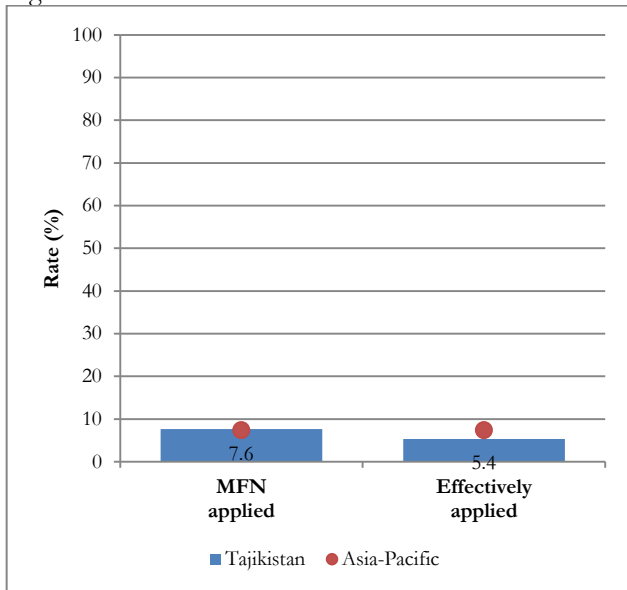
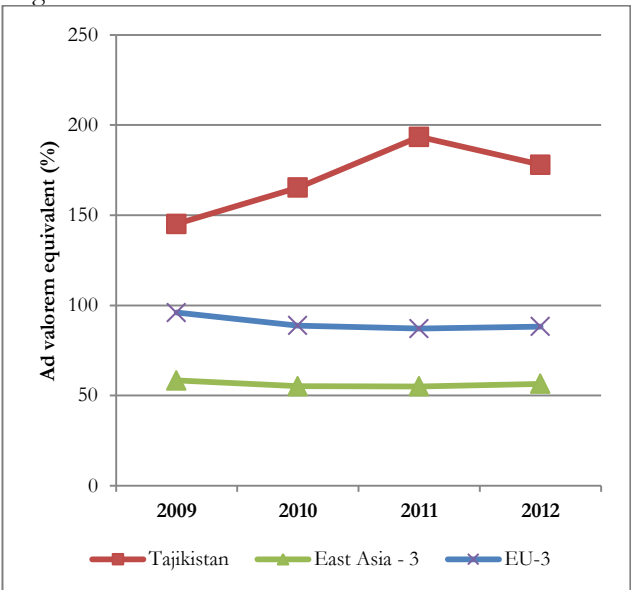


Figure 7. Trade costs



Sources: Trade and tariff data were accessed through WITS. FDI data was accessed through UNCTADstat.

Notes: Trade data follows the HS2007 classification. Mirror data is used. Products are defined at the 6-digit level.

Definitions: Primary, intermediate, consumer, and capital goods are defined using UNCTAD System of Accounts. Final goods are defined as the sum of consumer and capital goods. Bound tariff is the maximum most favoured nation (MFN) tariff permitted under WTO obligations. MFN applied tariff is the tariff applied on imports among WTO members. Effectively applied rate is the lowest tariff available, i.e. preferential rates where available.

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