Разработка и внедрение комплексных мер по адаптации водного сектора к изменениям климата, включая снижение рисков водных и экологических катастроф, повышение устойчивости сельского хозяйства и городских систем водоснабжения, обеспечит долгосрочную безопасность и устойчивое развитие страны.

Реализация предложенных стратегических направлений позволит укрепить роль Кыргызстана как водного центра Центральной Азии, повысить устойчивость национальной системы управления водными ресурсами и создать условия для гармоничного взаимодействия человека и природы в условиях глобальных климатических и гидрологических изменений.

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Рецензент: доктор экономических наук Дженалиева М.А.

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Хо Цянь Цянь, Джаманкулов Б.С., Ван Вэньцзе, Ян Сунбай
Жусуп Баласагын атындагы КУУ,
Кыргыз Республикасынын Улуттук илимдер академиясы
Хо Цянь Цянь[1], Джаманкулов Б.С.[2], Ван Вэньцзе[3], Ян Сунбай[4]
КНУ имени Жусупа Баласагына,
Национальная академия наук Кыргызской Республики
Qianqian Huo, Bolot S. Dzhamankulov, Wenjie Wang, Songbai Yang
KNU Jusup Balasagyn,
National Academy of Sciences of the Kyrgyz Republic

ORCID 0009-0006-0648-8117[1]
ORCID 0000-0003-2379-4264[2]
ORCID 0009-0000-2535-2473[3]
ORCID 0009-0002-6470-0279[4]

КЫРГЫЗ РЕСПУБЛИКАСЫНЫН КЫТАЙ ЭЛ РЕСПУБЛИКАСЫ МЕНЕН HS 01–24 АГРАРДЫК ТОВАРЛАР БОЮНЧА ТЫШКЫ СООДАСЫ: 2020–2025-ЖЫЛДАРДАГЫ ДИНАМИКА

ВНЕШНЯЯ ТОРГОВЛЯ АГРАРНЫМИ ТОВАРАМИ HS 01–24 МЕЖДУ КЫРГЫЗСКОЙ РЕСПУБЛИКОЙ И КНР: ДИНАМИКА 2020–2025 ГГ.

AGRICULTURAL HS 01–24 TRADE BETWEEN THE KYRGYZ REPUBLIC AND CHINA: 2020–2025 DYNAMIC

Кыскача мүнөздөмө: Макалада Кыргыз Республикасынын Кытай Эл Республикасы менен HS 01–24 товардык топтору боюнча 2020–2025-жылдардагы агрардык тышкы соодасынын абалы жана өнүгүү перспективалары талданат. Изилдөөнүн объектиси катары Кыргыз Республикасы менен Кытай Эл Республикасынын ортосундагы агрардык товардык агымдар, ал эми предмети катары импорт-экспорттун динамикасы, товардык түзүмү, рынокко кирүү шарттарын аныктаган санитардык-фитосанитардык талаптар жана логистикалык факторлор каралат. Изилдөөнүн максаты - Кыргыз Республикасы менен Кытай Эл Республикасынын агрардык соодасындагы дисбаланстарды жана өсүү шарттарын структуралык-динамикалык ыкма аркылуу баалоо, экспорттук нишаларды кеңейтүүгө жана соода туруктуулугун күчөтүүгө багытталган сунуштарды негиздөө. Изилдөөдө убакыт катарларын талдоо, соода балансы жана импортту экспорт менен жабуу көрсөткүчтөрү, HS классификациясы боюнча структуралык талдоо, ошондой эле регулятордук-институционалдык талдоо ыкмалары колдонулат. Натыйжалар импорттун тез өсүшүн жана экспорттун туруксуздугун көрсөтүп, бул жагдай терс соода сальдосунун тереңдешине алып келерин айгинелейт. Изилдөөнүн илимий жаңылыгы агрардык сооданын динамикасын Кытай Эл Республикасынын рынокко кирүү талаптары жана соодага көмөктөшүү механизмдери менен бирдиктүү аналитикалык алкакта байланыштыргандыгында турат.

Аннотация: Статья посвящена анализу состояния и перспектив внешней торговли аграрными товарами HS 01–24 между Кыргызской Республикой и Китайской Народной Республикой в 2020–2025 гг. Объектом исследования выступают двусторонние аграрные товарные потоки, предметом - их динамика, структурные параметры и институционально-логистические детерминанты, включая санитарно-фитосанитарные требования. Цель работы состоит в комплексной оценке дисбалансов аграрной торговли между Кыргызской Республикой и Китайской Народной Республикой, выявлении факторов роста и определении направлений устойчивой трансформации экспорта. Методологически исследование опирается на структурно-динамический анализ, структурный анализ по HS-группам и регуляторно-институциональную интерпретацию барьеров доступа на рынок Китайской Народной Республики, в том числе требований к регистрации зарубежных производителей пищевой продукции. Результаты показывают ускоренный рост аграрного импорта из Китайской Народной Республики при нестабильном и низком экспорте Кыргызской Республики в Китай, что закрепляет отрицательное сальдо и усиливает зависимость продовольственного сегмента от внешних условий. Научная новизна заключается в интеграции количественной диагностики динамики HS 01–24 с анализом SPS-контекста и инструментов торгового содействия, направленных на расширение экспортных ниш и повышение конкурентоспособности.

Abstract: This article examines the current state and prospects of the agricultural HS 01–24 foreign trade between the Kyrgyz Republic and the People’s Republic of China over 2020–2025. The research object is bilateral agricultural merchandise flows, while the subject focuses on their dynamics, structural composition, and institutional-logistical determinants, including sanitary and phytosanitary requirements. The study aims to provide a comprehensive assessment of trade imbalances, identify growth drivers, and outline directions for a more resilient and higher-quality export transformation. Methodologically, the paper applies a structural-dynamic approach, HS-based structure analysis, and regulatory-institutional assessment of market-access costs for exports to China, including overseas food establishment registration requirements. The findings indicate a rapid expansion of agricultural imports from China alongside low and volatile Kyrgyz agricultural exports to China, resulting in a persistent negative balance and increased exposure of the food segment to external shocks.

The paper's novelty lies in linking HS 01–24 quantitative diagnostics with SPS and trade-facilitation as practical conditions for scaling export niches and improving competitiveness.

Негизги сөздөр: Кыргыз Республикасы; Кытай Эл Республикасы; агрардык соода; HS 01–24; импорт; экспорт; соода сальдосу; SPS-чаралары; азык-түлүк коопсуздугу; соодага көмөктөшүү; логистика.
Ключевые слова: Кыргызская Республика; Китайская Народная Республика; аграрная торговля; HS 01–24; импорт; экспорт; торговое сальдо; меры SPS; продовольственная безопасность; содействие торговле; логистика.
Keywords: Kyrgyz Republic; People's Republic of China; agricultural trade; HS 01–24; imports; exports; trade balance; SPS measures; food security; trade facilitation; logistics.

Introduction. Relevance of the study. Foreign trade in agricultural commodities between the Kyrgyz Republic and the People's Republic of China under HS 01–24 constitutes a critically important interface that simultaneously affects food resilience, domestic price dynamics, and the feasibility of commercializing national agricultural potential through exports. The relevance of the topic is reinforced by the Kyrgyz Republic's high dependence on the Chinese direction in overall imports: according to the WTO profile based on UN Comtrade, Kyrgyz imports from China amounted to USD 5.45 billion in 2024, reflecting China's dominant role in the country's import flows [21; 26]. In the agricultural segment, this dependence is associated not only with the import–export balance, but also with market access barriers in China, above all sanitary and phytosanitary requirements and regulatory admission procedures, as well as logistics costs and border infrastructure constraints [13; 26]. Taken together, these factors determine the sustainability of bilateral supplies, the competitiveness of Kyrgyz products, and the realism of scaling export niches. Research objective. To assess the dynamics, structure, and key constraints of foreign trade in HS 01–24 agricultural commodities between the Kyrgyz Republic and the People's Republic of China in 2020–2025, and to identify directions for improving resilience and export potential.
Research objective. To assess the dynamics, structure, and key constraints of foreign trade in HS 01–24 agricultural commodities between the Kyrgyz Republic and the People's Republic of China in 2020–2025, and to identify directions for improving resilience and export potential.
Research tasks:
1. To characterize the role of China in the Kyrgyz Republic's agricultural foreign trade and the degree of flow concentration.
2. To analyze the dynamics of exports, imports, and the trade balance for HS 01–24 between the Kyrgyz Republic and China in 2020–2025.
3. To identify the commodity structure of trade and the level of diversification across HS groups.
4. To assess the impact of SPS requirements and market admission procedures on export opportunities to China, including the registration of overseas food producers.
5. To determine the logistical and institutional factors affecting export expansion and imbalance reduction, and to formulate applied recommendations.
Literature review. In HS-based studies, agricultural trade under HS 01–24 is typically operationalized as merchandise flows classified by the Harmonized System, where HS functions as a globally standardized nomenclature for customs tariffs and international trade statistics, built on common interpretation rules and a six-digit coding logic maintained by the World Customs Organization [19]. In this frame, HS 01–24 covers the core agri-food domain from live animals and animal products through vegetables, fats and oils, prepared foods, beverages and tobacco, which makes it a workable "statistical perimeter" for diagnosing agri-food trade structure with sufficient commodity detail and cross-country comparability [19]. The measurement basis is international merchandise trade statistics, where exports and imports are recorded according to UN methodological recommendations, and HS is explicitly recommended as the principal product classification for compilation and dissemination of trade data [23].

A structural-dynamic approach in trade analytics treats bilateral flows not as a single aggregate, but as a time series of commodity-disaggregated transactions whose evolution is interpreted through composition, concentration, and the reallocation of value across HS chapters. Within this logic, trade balance, coverage ratios, and "mirror" consistency issues are not merely descriptive, because they influence how volatility and asymmetry are interpreted when a small economy trades with a much larger partner [23]. UN guidance on trade statistics stresses that conceptual choices and compilation practices shape what is counted as exports and imports and how data are disseminated, while UN Comtrade methodological notes underline that comparability depends on harmonized classifications, reporting practices, and the treatment of customs procedures [21].

The earliest theoretical anchor for bilateral agricultural trade remains classical comparative advantage, where D. Ricardo explains specialization as a consequence of relative productivity differences even when one country is absolutely more productive in all goods [16]. In the Heckscher–Ohlin tradition, E. Heckscher and B. Ohlin shift the explanatory weight to endowments and factor intensities, a move that is especially relevant for agri-food because land, water, labor quality, and climate become implicit determinants of what a country can export competitively [8; 15]. In contemporary interpretations, these classical foundations justify treating HS 01–24 not as an arbitrary list, but as a sector whose trade patterns are expected to be sensitive to endowment constraints and to the relative costs of compliance and logistics that effectively "tax" landlocked or remote producers [13].

Because comparative advantage is not directly observable, empirical trade work often relies on revealed comparative advantage indicators, where B. Balassa's RCA formalizes specialization using observed export shares [3]. Later methodological discussions note that RCA is useful for mapping specialization patterns but can blend multiple forces that are not "pure" comparative advantage, including policy distortions, non-tariff measures, and firm-level selection into exporting, which is why many authors treat RCA as a diagnostic rather than a structural causal measure [7]. S. French's reassessment clarifies when RCA aligns with theory-consistent objects and when it may mislead policy inference, while the Balassa tradition continues to underpin HS-level competitiveness screening in practice [3; 7].

New trade theory adds mechanisms that matter for modern agri-food trade with China, where product differentiation, branding, and scale in processing and distribution often shape competitiveness as much as primary production. P. Krugman's monopolistic-competition models show how increasing returns and differentiated products can generate trade even between similar economies, which is conceptually important when HS 01–24 includes processed foods and beverages where scale economies and variety are central [12, p. 57]. In heterogeneous-firm theory, M. J. Melitz explains why trade exposure reallocates market shares toward more productive firms and why exporting is selective due to fixed and sunk costs, an insight that maps naturally onto market-access compliance costs and certification regimes typical for agri-food exports [14]. Bilateral trade between the Kyrgyz Republic and China is also routinely interpreted through the gravity paradigm, which models trade as rising with economic mass and falling with trade costs. J. Tinbergen's early gravity intuition becomes theoretically grounded in J. E. Anderson's microfoundations and in the "multilateral resistance" formulation of J. E. Anderson and E. van Wincoop, which shows that bilateral frictions must be understood relative to the whole system of partners [17, p. 29]. In applied trade, these results justify treating distance, border procedures, and institutional frictions as structurally meaningful determinants rather than background "controls," and they explain why a landlocked exporter can face systematically higher effective trade costs even when tariffs are low [2, p. 70].

A related strand links gravity to margins of trade and diversification, which matters for HS 01–24 because export upgrading often appears as entry into new products and destinations rather than only larger volumes of the same goods. D. Hummels and P. Klenow formalize extensive versus intensive margins and show how variety and quality shifts can account for large shares of export expansion, while T. Chaney provides a framework connecting trade costs to both margins under firm heterogeneity [4; 10, p. 13]. For a small economy, these theories motivate looking beyond aggregate export totals toward whether the HS 01–24 basket is broadening, whether product lines persist, and whether compliance and logistics costs are preventing entry into higher-value processed segments [10].

Logistics and geography become particularly binding in landlocked contexts, where infrastructure and transit shape the ad-valorem equivalents of distance and border frictions. N. Limão and A. Venables show how poor infrastructure and geographic disadvantages translate into higher transport costs and lower trade, which provides a direct conceptual bridge to institutional-logistical determinants in Kyrgyz–China agri-food flows [13, p. 43]. In policy terms, trade facilitation is treated as a cost-reduction technology for commerce, and the WTO Trade Facilitation Agreement sets a multilateral benchmark for simplifying and accelerating border procedures and information transparency, which gravity-based empirical work often links to trade growth via reduced administrative frictions [2].

Agriculture differs from many manufactured sectors because market access is frequently mediated by safety, animal and plant health, and conformity systems that operate as non-tariff measures with both welfare and protectionist implications. The WTO SPS Agreement defines the scope and logic of sanitary and phytosanitary measures, while UNCTAD's classification system places SPS measures within a broader taxonomy of non-tariff interventions, enabling empirical work to separate technical regulations, conformity assessment, and other behind-the-border restrictions [24]. In the applied literature, S. Henson and R. Loader frame SPS as a central barrier for developing-country agri-food exports, while A.-C. Disdier, L. Fontagné, and M. Mimouni quantify how SPS and TBT notifications correlate with trade outcomes in agricultural products, highlighting that standards can reduce exports through compliance costs even when they aim to protect consumers [6, p. 62; 9].

Because SPS and related technical rules often function like trade costs, quantitative work increasingly converts them into ad-valorem equivalents and integrates them into gravity models. H.-L. Kee, A. Nicita, and M. Olarreaga propose trade restrictiveness frameworks that combine tariffs and non-tariff measures into synthetic restrictiveness indicators, while P. Crivelli and J. Gröschl emphasize the measurable negative trade effects associated with SPS measures in many settings, reinforcing the logic of treating compliance as a cost structure that shapes which products can profitably enter strict markets [5; 11]. These approaches support the conceptual claim that HS 01–24 export scaling is not only a production issue, but also a compliance-and-verification issue where the fixed costs of meeting standards can determine the set of feasible export niches [9].

For exports to China specifically, institutional market-access costs are increasingly discussed through the lens of registration, traceability, and safety governance. China's General Administration of Customs has implemented a registration regime for overseas manufacturers of imported food under Decree 248, complemented by broader import and export food safety administration measures under Decree 249, which together institutionalize compliance obligations that can operate as fixed entry costs for foreign suppliers [27]. Guidance materials from competent authorities and publicly available decree texts emphasize that overseas establishments exporting food to China must obtain registration and satisfy specified administrative and labeling requirements, which makes "SPS plus registration governance" a practical component of the theoretical trade-cost concept in the Kyrgyz–China agri-food interface.

Materials and methods. The methodological framework of the study is designed as a mixed-methods approach combining statistical diagnostics of trade flows with an institutional interpretation of market access conditions. The quantitative component relies on comparable aggregated series of foreign trade based on the Harmonized System commodity nomenclature, which is developed and maintained by the World Customs Organization and serves as the basic international standard for classifying goods in customs and trade statistics [20].The substantive boundaries of the analysis are defined by HS 01–24, which corresponds to the commonly accepted trade-policy analytical frame for agricultural and food commodities and is consistent with the product scope of the WTO Agreement on Agriculture, where agricultural products are described through HS Chapters 1–24 with a reservation that fish and fish products may be treated separately [26]. The empirical base is formed from consolidated customs and statistical data on bilateral flows in value terms, ensuring a unified measurement scale, intertemporal comparability, and the possibility of structural decomposition to the levels of HS chapters and HS4 product lines [32].

The quantitative analytical toolkit includes time-series analysis of imports, exports, turnover, and the balance, with calculations of absolute changes, growth rates, and average annual rates of change, as well as indicators

of trade asymmetry, above all the export-to-import coverage ratio, which formalizes the resilience or deterioration of the bilateral balance. The structural technique is implemented by constructing the commodity structure across HS chapters and HS4 positions, ranking by value share and assessing the concentration of export and import baskets, which makes it possible to identify imbalance-forming niches and measure dependence on a limited set of commodity groups. The qualitative block is represented by regulatory and institutional analysis of sanitary and phytosanitary measures as a legal and procedural framework directly shaping the feasibility of trade in food and agricultural products, given that the WTO Agreement on the Application of Sanitary and Phytosanitary Measures sets the baseline rules for food safety and the protection of animal and plant health in international trade [18].

With regard to the China direction, the analysis additionally addresses market admission and compliance requirements, including the registration regime for overseas manufacturers of imported food products, introduced from 1 January 2022 by China's customs regulator, which increases fixed transaction costs and amplifies scale effects for small export consignments. The integration of quantitative results and qualitative interpretation is achieved through triangulation, whereby statistically identified structural breaks and turning points are tested for consistency with changes in the regulatory environment and logistical and infrastructural constraints, providing a causally oriented explanation of dynamics and strengthening the validity of the conclusions.

Results and discussion. Foreign trade in agricultural and food commodities between the Kyrgyz Republic and the People's Republic of China is analytically operationalized here through HS Chapters 01–24, and the corresponding value flows for 2020–2025 are examined in million US dollars. This delineation is methodologically justified because it captures the core "food-and-agro" perimeter in a way that is both sufficiently broad to register macro-dynamics of turnover and sufficiently structured to diagnose persistent, reproducible asymmetries by commodity chapter and product line [26]. It also allows the analysis to remain consistent with widely used customs-statistical practice, where agri-food is interpreted as a combined space of primary and processed goods rather than as a narrow farming segment. In practical terms, HS 01–24 provides the level of granularity needed to connect observed trade outcomes with admission procedures, compliance capacity, and logistics constraints, which are typically commodity-specific rather than purely macroeconomic.

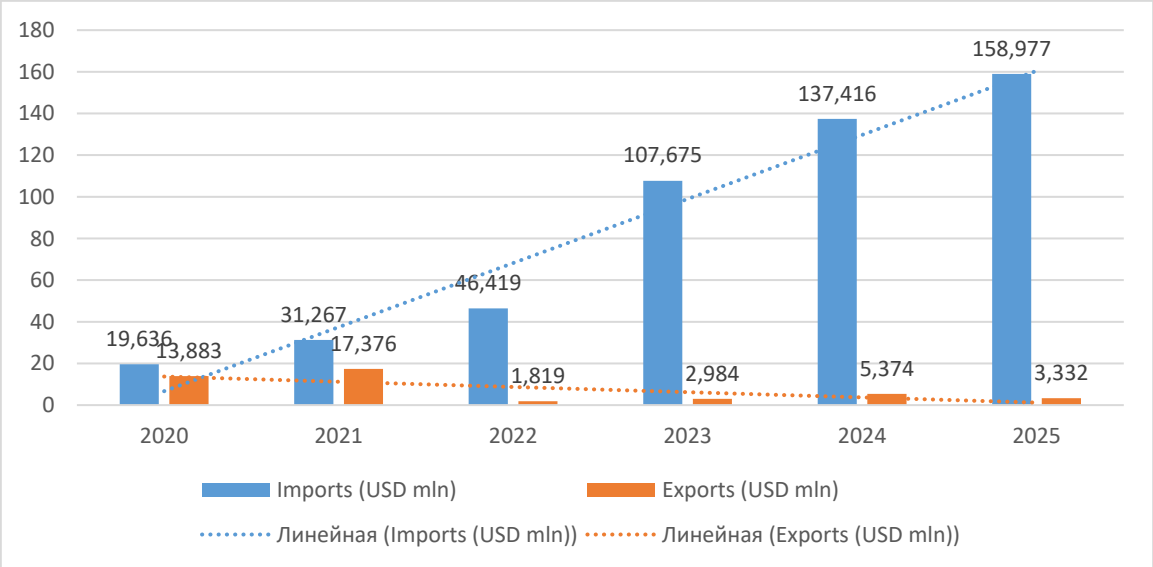


Figure 1. Dynamics of agricultural trade between the Kyrgyz Republic and China (HS 01–24), 2020–2025 [29]

Over 2020–2025, bilateral turnover expanded sharply under an asymmetric distribution of gains, and the asymmetry is both numerically explicit and economically consequential. Turnover increased from USD 33.5 million to USD 162.3 million (almost 4.8 times), yet the principal driver was imports, which rose from USD 19.6 million to USD 159.0 million (about 8.1 times), while exports declined from USD 13.9 million to

USD 3.3 million. The implication is not simply that imports grew faster than exports; rather, the entire growth trajectory of bilateral trade became increasingly detached from the export channel as a stable, scalable mechanism of market access [14].This is reflected in the deterioration of the export coverage ratio from 0.707 to 0.021, i.e., a shift from a situation where exports covered a substantial portion of import outlays to one where they became economically negligible relative to import payments. Predictably, the negative balance deepened from USD −5.8 million to USD −155.6 million, which, given the monotonic nature of the deficit's expansion after 2021, should be interpreted not as a short-lived deviation but as the consolidation of a structural imbalance embedded in product structure, compliance regimes, and the relative scale advantages of Chinese supply [13].

Table 1. Key indicators of agricultural trade between the Kyrgyz Republic and China (HS 01–24), 2020–2025, USD million [6]

Year	Imports	Exports	Turnover	Balance	Coverage ratio (exports/imports)
2020	19.636	13.883	33.519	-5.753	0.707
2021	31.267	17.376	48.642	-13.891	0.556
2022	46.419	1.819	48.238	-44.600	0.039
2023	107.675	2.984	110.660	-104.691	0.028
2024	137.416	5.374	142.789	-132.042	0.039
2025	158.977	3.332	162.309	-155.645	0.021

While imports continued to rise, exports collapsed by almost an order of magnitude, which statistically resembles a regime shift in the functioning of the export channel. In applied interpretation, such a break is commonly explained by a combination of factors: a narrow export product base, heightened sensitivity of shipments to sanitary, phytosanitary, and technical admission procedures, and rising fixed transaction costs for small consignments and small producers. The dynamics are consistent with a situation where a few exportable lines exist, but their repetition and scaling are constrained by documentation, traceability, and stable supply requirements that are difficult to meet when production is fragmented. In this context, it is essential to consider that since 2022, compliance requirements for access to China's food market have become more consequential, including mandatory registration procedures for overseas production facilities with the Chinese regulator, for resource-constrained exporters, this may imply a transition from episodic exports to a forced pause until production and documentation systems are adapted [27]. From a risk perspective, the observed volatility also means that export performance is likely to react strongly to single-point disruptions, such as delays in certification, laboratory capacity bottlenecks, or border clearance uncertainty, even if nominal price competitiveness remains adequate.

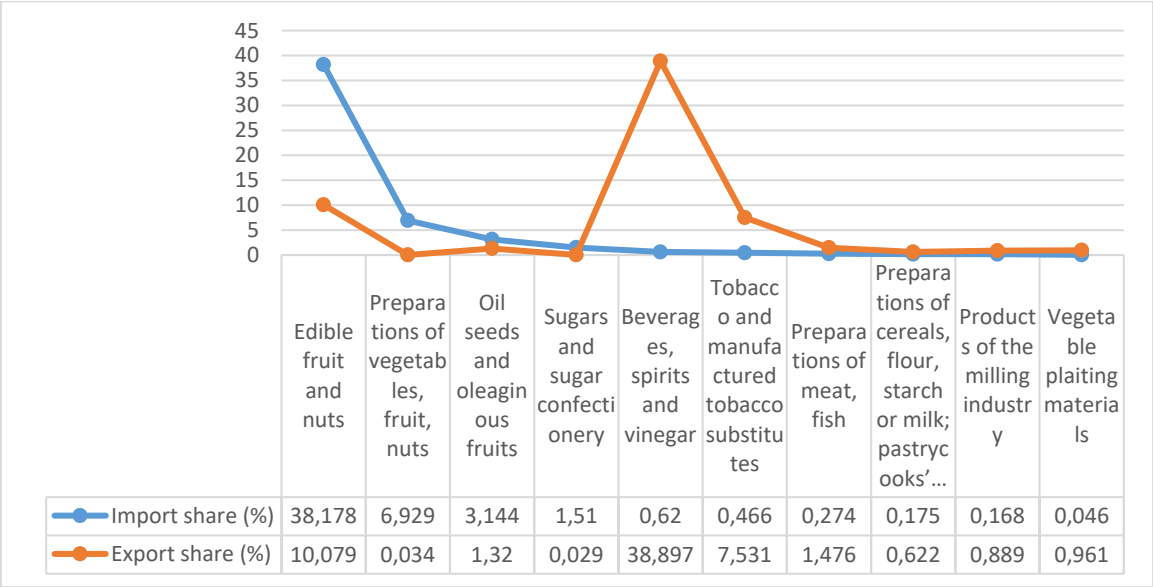


Figure 2. Concentration of the 2025 commodity structure by HS chapters [28]

The 2025 import structure demonstrates high concentration and a consumer-and-raw-material orientation of demand for Chinese supply, which has direct implications for resilience, price transmission, and border-risk exposure. The largest component is HS 08 (edible fruits and nuts) at USD 60.7 million (38.2% of imports), followed by HS 02 (meat and edible meat offal) at USD 38.6 million (24.3%), and HS 07 (vegetables) at USD 19.7 million (12.4%) [29]. Together, these three chapters account for roughly three quarters of total imports, meaning that import dependence is reproduced through a limited set of mass-market commodity niches with high turnover and strong seasonal/price sensitivity. Such a configuration can indeed smooth seasonal deficits and stabilize consumption availability in the short run; however, it simultaneously amplifies systemic vulnerability because concentrated import baskets exhibit non-linear exposure to disruptions.

Under high concentration, even localized frictions–temporary tightening of phytosanitary control, transport tariff increases, congestion at border checkpoints, or short-lived logistics interruptions–may have a disproportionate effect on domestic market conditions, since substitution across chapters is limited and the affected items belong to essential food categories. Even a coarse concentration assessment illustrates this point: if one aggregates the import structure into the three dominant chapters plus "all other chapters," the implied concentration index is already high, signalling that diversification is insufficient to neutralize commodity-specific shocks [24].

Table 2. Commodity structure of trade between the Kyrgyz Republic and China 2025 [31]

HS	HS chapter name	Imports, USD mln	Import share, %	Exports, USD mln	Export share, %
8	Edible fruit and nuts, peel of citrus fruit or melons	60.695	38.178	0.336	10.079
20	Preparations of vegetables, fruit, nuts, or other parts of plants	11.015	6.929	0.001	0.034
12	Oil seeds and oleaginous fruits, other seeds and grain	4.999	3.144	0.044	1.320
17	Sugars and sugar confectionery	2.401	1.510	0.001	0.029
22	Beverages, spirits and vinegar	0.986	0.620	1.296	38.897
24	Tobacco and manufactured tobacco substitutes	0.741	0.466	0.251	7.531
16	Preparations of meat, fish, or crustaceans	0.435	0.274	0.049	1.476

19	Preparations of cereals, flour, starch or milk, pastrycooks' products	0.278	0.175	0.021	0.622
11	Products of the milling industry, starches, wheat gluten	0.267	0.168	0.030	0.889
14	Vegetable plaiting materials, other vegetable products	0.074	0.046	0.032	0.961

The export basket is markedly narrower and more volatile than the import basket and, in 2025, effectively rests on several anchor items. At the HS chapter level, HS 22 (beverages) dominates with 38.9 percent of exports and HS 05 (products of animal origin not elsewhere specified) with 30.0 percent, together, they account for about 69 percent of export value, while adding honey (HS 04), nuts and fruits (HS 08), and tobacco (HS 24) raises concentration to a level at which any localized disruption in certification, admission procedures, logistics, or demand immediately affects aggregate performance. This profile also suggests that export capability is currently tied to a small number of established commercial pathways, rather than to a broad-based set of producers and product lines. At the HS4 level, this is confirmed by the fact that exports are led by malt beer (HS 2203) and animal-origin products not elsewhere specified (HS 0511), whereas niches with potentially higher value added are represented by small volumes and require a more demanding quality infrastructure, including traceability, laboratory-based safety assurance, and supply stability [21]. The observed structure is consistent with a stage of export development where market entry has occurred for selected items, but the institutional conditions for replication and scaling across adjacent product groups remain incomplete.

Table 3. Largest product lines in 2025 (HS4): imports and exports between the Kyrgyz Republic and China [21]

Flow	HS4	Product name	Value, USD mln	Share, %
Imports	0207	Meat and edible offal of poultry	38.639	24.305
Imports	0802	Other nuts, fresh or dried	27.112	17.054
Imports	0805	Citrus fruit, fresh or dried	13.635	8.577
Imports	2008	Fruit, nuts and other edible parts of plants, otherwise prepared	8.789	5.528
Imports	0701	Potatoes, fresh or chilled	7.852	4.939
Imports	0804	Dates, figs, pineapples, avocados, mangoes and similar	7.442	4.681
Imports	0709	Other vegetables, fresh or chilled	5.920	3.724
Imports	0806	Grapes, fresh or dried	3.566	2.243
Imports	0603	Cut flowers and flower buds	3.559	2.239
Imports	0602	Other live plants, cuttings and slips	3.231	2.032
Exports	2203	Malt beer	1.222	36.679
Exports	0511	Products of animal origin, not elsewhere specified	0.999	29.985
Exports	0802	Other nuts, fresh or dried	0.283	8.487
Exports	0409	Natural honey	0.270	8.105
Exports	2402	Cigars, cigarillos and similar	0.251	7.531
Exports	2202	Waters and non-alcoholic beverages, including mineral/aerated	0.074	2.212
Exports	0813	Dried fruits	0.053	1.592

Exports	1602	Prepared or preserved meat or meat offal	0.049	1.476
Exports	1211	Plants and parts of plants used in perfumery, pharmacy or similar	0.044	1.320
Exports	1404	Vegetable products not elsewhere specified	0.032	0.961

In the short term, imports are likely to remain dominant due to the scale and diversity of Chinese supply, whereas export growth is feasible primarily if three conditions are addressed simultaneously. First, expanding and formally securing product-specific market admission across the relevant commodity range. Second, establishing export compliance as a production norm through registration procedures, HACCP-based systems, traceability, laboratory-backed safety assurance, and standardized packaging and labeling, thereby reducing uncertainty for both the Chinese regulator and the importer. Third, lowering the logistics premium for perishable goods through cold-chain infrastructure, consolidation capacity, predictability of border clearance, and transport corridors, without these, even a high-quality and competitive product loses on time costs and spoilage losses [13].

The findings make it possible to interpret Kyrgyzstan–China bilateral agri-food trade as a system in which expanding turnover is accompanied by deepening asymmetry and the entrenchment of an import-oriented pattern. The observed dynamics point not to short-term volatility but to the structural nature of the imbalance: import supplies act as the principal driver, whereas the export channel exhibits instability and high sensitivity to external constraints. Particularly indicative is the disruption in export functioning following changes in the regulatory environment and the tightening of market-admission procedures. Under conditions of a narrow product base, limited scalability of consignments, and a high share of fixed transaction costs, exports shift from an episodic instrument for commercializing agricultural potential to a vulnerable link that depends on meeting safety requirements, traceability standards, and documentary compliance.

The structural analysis further confirms that the import basket is concentrated in mass-market consumer and raw-material niches, which can bridge seasonal gaps in domestic supply and stabilize consumption, while simultaneously creating dependence on a limited set of commodity groups. Such concentration increases the domestic market's exposure to logistics failures, border delays, tariff changes, and intensified phytosanitary controls, which may translate into price fluctuations and risks to the availability of specific food categories. By contrast, the export basket demonstrates pronounced narrowness and an "anchor" profile: the dominance of a few items implies that any localized disruptions in certification, admission, transportation, or demand rapidly affect aggregate performance. From an applied perspective, this points to the need to address three interrelated tasks simultaneously: institutionally securing market access for specific product lines, turning compliance into a production norm (registration, HACCP-based safety systems, traceability, laboratory-backed quality assurance, and standardized packaging and labeling), and reducing the "logistics premium" for perishable goods through cold-chain infrastructure, shipment consolidation, and predictable border-clearing procedures. Only through the synchronized implementation of these conditions can export potential move from a theoretical opportunity to a stable practice.

Conclusion. Overall, the study shows that the resilience of Kyrgyzstan's agri-food trade with China in its current configuration is determined less by the scale of turnover than by the quality of the institutional and infrastructural environment: with highly concentrated imports and a narrow, regulation-sensitive export channel, the structural imbalance is reproduced and vulnerability to external shocks increases. This means that even strong growth in total turnover can coexist with weaker systemic stability if the import basket remains concentrated in essential chapters and if exports remain confined to a few volatile lines that are easily disrupted by changes in admission procedures, certification capacity, or border logistics. In such a setting, shocks are transmitted quickly into domestic availability and prices because substitution options are limited, while the export side cannot counterbalance risks through diversified revenue streams and persistent market presence.

Therefore, strengthening resilience and achieving realistic export expansion require a shift from fragmented shipments to a systemic model in which market admission, safety standards, traceability, and logistics are not one-off "contract-specific" requirements but permanent elements of the sector's organization

of production and trade. Practically, this implies building repeatable compliance routines, stabilizing supply chains through aggregation and quality management, and aligning production practices with predictable documentation, laboratory control, and labeling norms that reduce uncertainty for Chinese regulators and importers. At the same time, lowering the logistics premium through cold-chain capacity, consolidation infrastructure, and more predictable border clearance is necessary to convert compliance readiness into actual competitive delivery performance, especially for perishable and high-value items. In combination, these steps redefine export capability as an institutional asset of the sector rather than as an episodic outcome, making it possible to broaden the HS 01–24 export basket, reduce concentration risk, and gradually moderate the persistent negative balance without undermining consumer access to food imports.

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Хуанг Мэйсю, Джаманкулов Б.С., Сюй Гуаньин, Алыбаев Дж.Б., Чжуо И.
Жусуп Баласагын атындагы КУУ,
Кыргыз Республикасынын Улуттук илимдер академиясы
Хуанг Мэйсю[1] Джаманкулов Б.С.,[2] Сюй Гуаньин[3] Алыбаев Дж.Б.,[4] Чжуо И.[5]
КНУ имени Жусупа Баласагына,
Национальная академия наук Кыргызской Республики[2]
Meixiu Huang, B.S. Dzhamankulov, Guanying Xu, Dz.B. Alybaev, Yi Zhuo
KNU Jusup Balasagyn,
National Academy of Sciences of the Kyrgyz Republic

ORCID: 0009-0008-3311-1440[1]
ORCID: 0000-0003-2379-4264[2]
ORCID: 0009-0008-6627-1782[3]
ORCID: 0000-0003-0931-9846[4]
ORCID: 0009-0000-1482-9854[5]

КЫТАЙДАГЫ ТУРАК ЖАЙ ТОПТОО ФОНДУНДАГЫ БӨЛҮШТҮРҮҮ ТЕҢСИЗДИГИ ЖАНА АНЫ РЕФОРМАЛОО ЖОЛДОРУ
ПРОБЛЕМА ДИСБАЛАНСА РАСПРЕДЕЛЕНИЯ В ЖИЛИЩНОМ НАКОПИТЕЛЬНОМ ФОНДЕ КИТАЯ И ПУТИ ЕГО РЕФОРМИРОВАНИЯ
THE "REVERSE DISTRIBUTION" PROBLEM OF CHINA'S HOUSING PROVIDENT FUND AND ITS REFORM PATHS

Кыскача мүнөздөмө: Турак жай топтоо фонду (ТЖТФ) Кытайдагы турак жай менен камсыздоонун негизги механизмдеринин бири болуп саналат. Бирок коомдук-экономикалык өнүгүү шартында аталган системада бөлүштүрүүдөгү дисбаланс күчөгөнү байкалат: орто жана жогорку кирешелүү топтор фондго каражат чегерүү, мамлекеттик колдоо чараларынан пайдалануу жана фонддун мүмкүнчүлүктөрүн колдонуу жагынан туруктуу артыкчылыктарга ээ болсо, төмөн кирешелүү