ITC by Country Report

Tajikistan 05/12/2014







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1. Country / Territory Brief



Tajikistan is a landlocked, Central Asian country that shares borders with Afghanistan, China, Kyrgyzstan, and Uzbekistan. Tajik exports are comprised mainly of aluminum, agricultural goods, and light industry. The most important market for Tajik products is Turkey, but exports are also destined for a variety of Asian, European, and CIS markets. The low level of product diversification and reliance upon natural resources makes the Tajik economy especially susceptible to volatile commodity prices. The imports of energy resources and advanced manufacturing products, which arrive largely from China, Russia, and Kazakhstan, have resulted in a significant trade deficit. Nevertheless, Tajikistan has taken steps to increase its global and regional integration through WTO accession in 2013 and by participating in the CIS free trade agreement. In order to enhance trade competitiveness, Tajikistan must address its low productivity, limited financial access, cumbersome regulatory and business environment, weak physical infrastructure, and underdeveloped quality management infrastructure.





2. People and Economy

2.1 People

Total population (growth rates per annum)	7,275,252 in 2012 with growth rates of 2.4% p.a during 2008-2012								
Population density (people per sq. km of land area)	52 in 2012								
Female population	9.7% in 2012								
Population below 15 years of age	8% in 2008 ; 36.5% in 2012								
Urban population	26.5% in 2012								
Population living below \$1.25 a day at purchasing power parity (PPP)	N.A								
Ranking in the Human Development Index (HDI)	125 out of 186 in 2012								
Evolution of the Human Development Index (HDI)	0.79 0.79 0.69 0.64 0.64 China China China Old China Old China Old China Old China Old Coin<								
Health	Life expectancy at birth (years) (67); Mortality rate, under-5 (per thousand live births) (58.3) in 2012								
Education	Education index - expected and mean years of schooling (rank) (56 out of 191) in 2012								
Income level	N.A								
Inequality	Inequality-adjusted HDI (rank) (81 out of 191)in 2012								
Poverty	Multidimensional Poverty Index (rank)(52 out of 191) in 2012								
Gender	Gender inequality index (rank) (91 out of 191) in 2012								
Sustainability	N.A								





2.2 Economy

Added value per sector

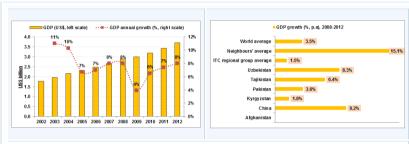
Evolution of GDP

(constant 2005 US\$)

Evolution of GDP per capita (constant 2005 US\$)

(current US\$ and % of GDP)

Sector added value	2004		2008	2012	
	US \$	%GDP	US \$	%GDP	US \$
Agriculture	399	21.6	1,025	22.7	0
Industry	654	35.4	1,278	28.3	0
Manufacturing	449	24.3	650	14.4	0
Services	794	43	2,207	48.9	0
Source: World Bank World Development Indicators (WDI)					
Note: Added value is US "6,976 to be read 6'976'		s are expr	essed in	i million, (SDP U



%GDP

0 0

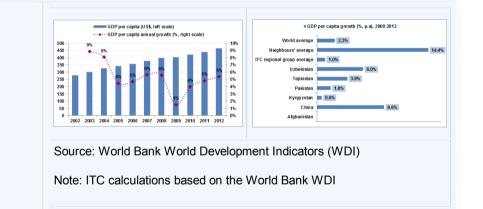
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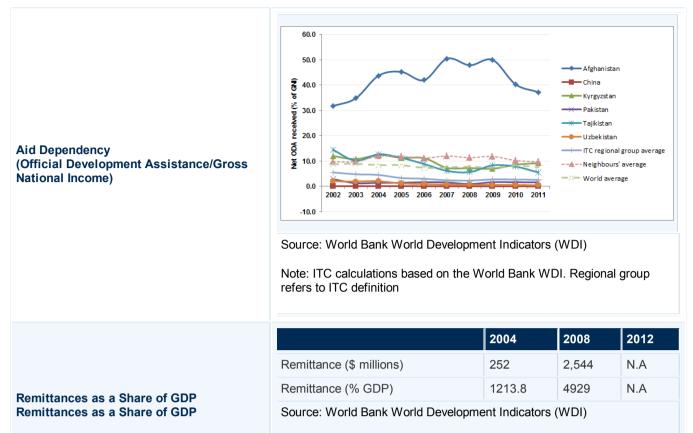
US\$, and

Source: World Bank World Development Indicators (WDI)

Note: ITC calculations based on the World Bank WDI







Note: ITC calculations based on World Bank WDI, IMF BOP statistics, and "6,976 to be read 6'976"



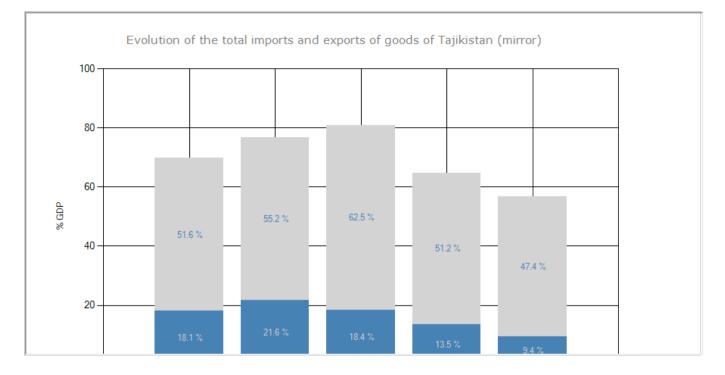




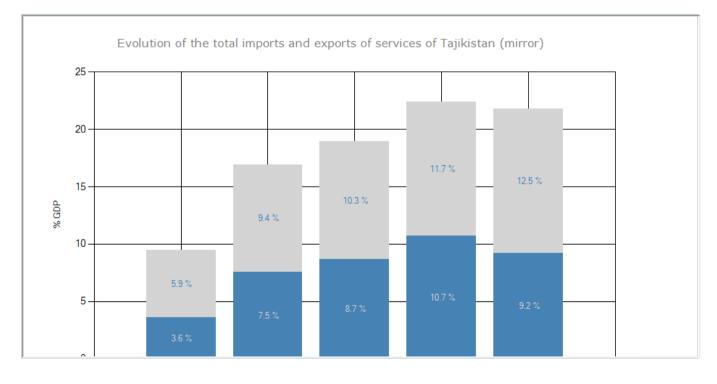
3. Trade Performance

3.1 General Trade Performance

3.1.1 Evolution of Trade Ratio to GDP - Goods

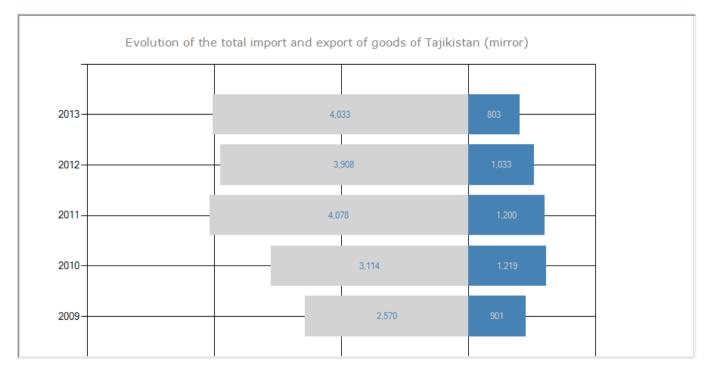


3.1.2 Evolution of Trade Ratio to GDP - Services

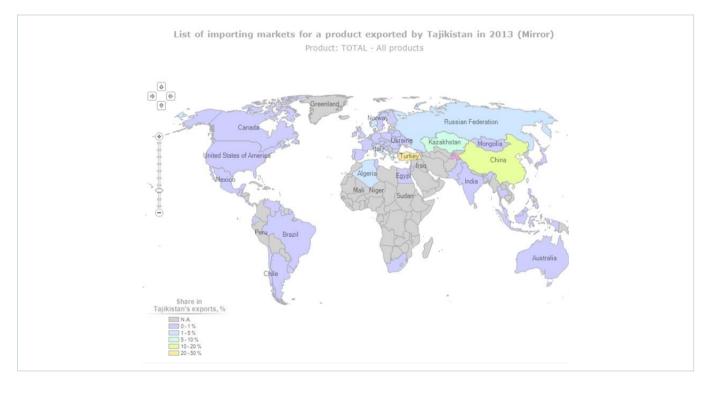




3.1.3 Evolution of Total Trade

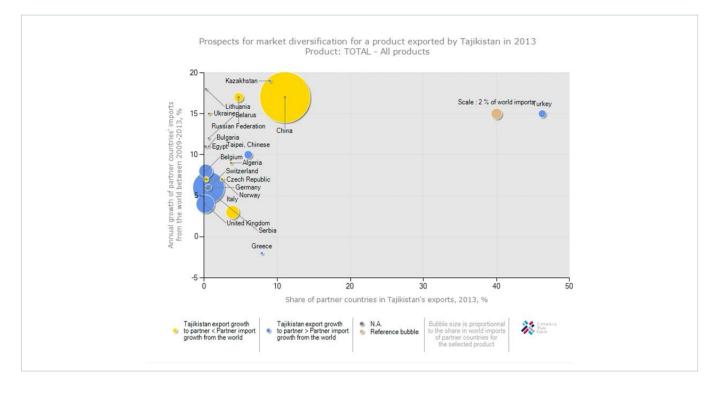


3.1.4 Trade Map

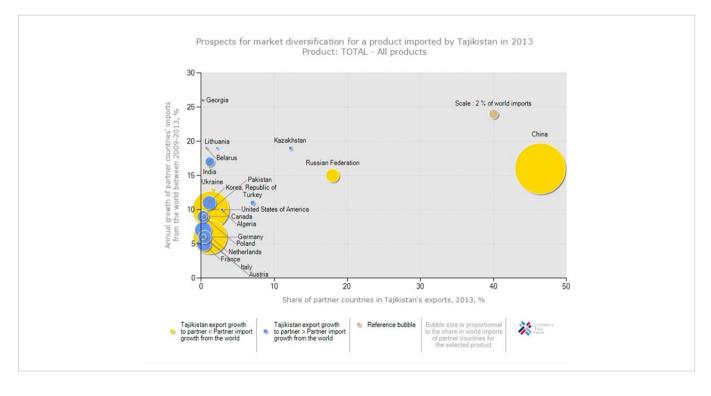




3.1.5 Export and Import by Leading Destination - Export

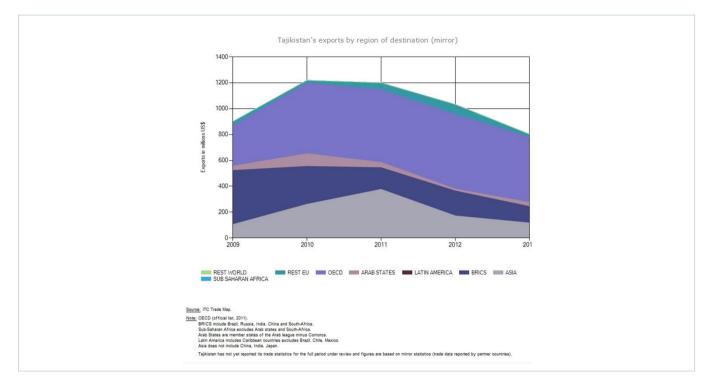


3.1.6 Export and Import by Leading Destination - Import

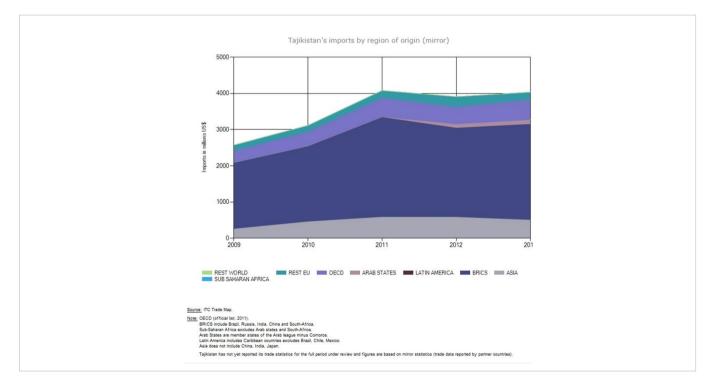




3.1.7 Evolution of Exports and Imports by Destination - Export

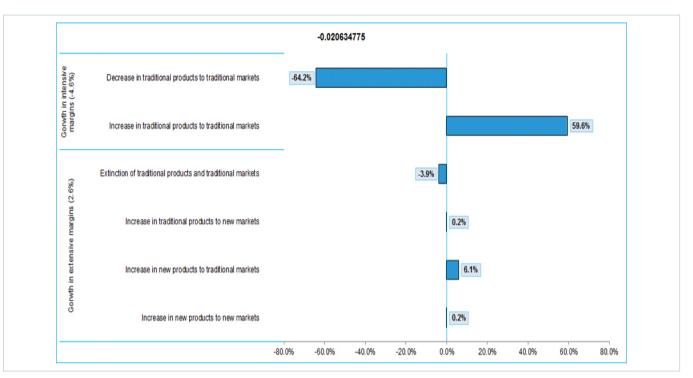


3.1.8 Evolution of Exports and Imports by Destination - Import





3.1.9 Total Export Growth



Source: ITC, calculations based on ITC's Trade Competitiveness Map data. Note:Graph shows decomposition of the country's export growth in value terms by diversification pattern over the indicated period.

3.1.10 Marginal Export Growth

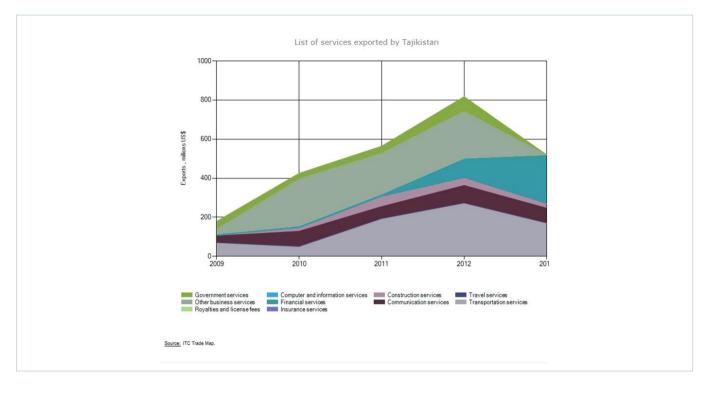
From 2009 to 2013, the country's total export in v	alue decreased	by -2.1%
Marginal Growth Due to	US\$ change	% change
Growth due to world trade's growth	400,046.0	48.8
Growth due to product specialisation	-1,566.6	-0.2
Growth due to geographic specialisation	-57,458.5	-7.0
Growth due to competitiveness	-357,940.9	-43.7
Sum of the marginal growths	-16,920.0	-2.1

Source: ITC, calculations based on ITC's Trade Competitiveness Map data.

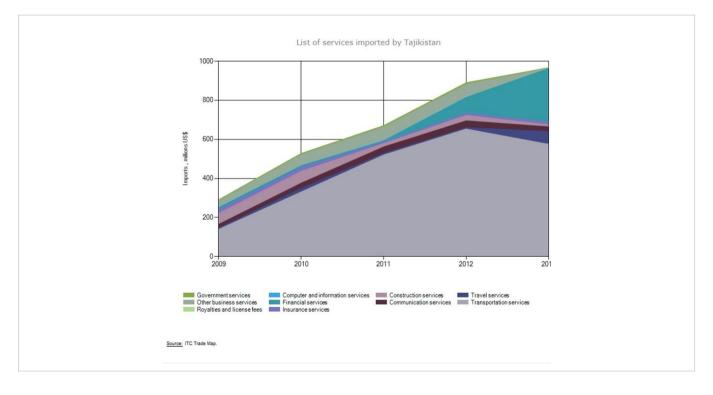
Note:Graph shows decomposition of the country's export growth in value by structural driving effects over the indicated period. Values are in US\$ thousands.



3.1.11 Composition of Trade in Services - Export

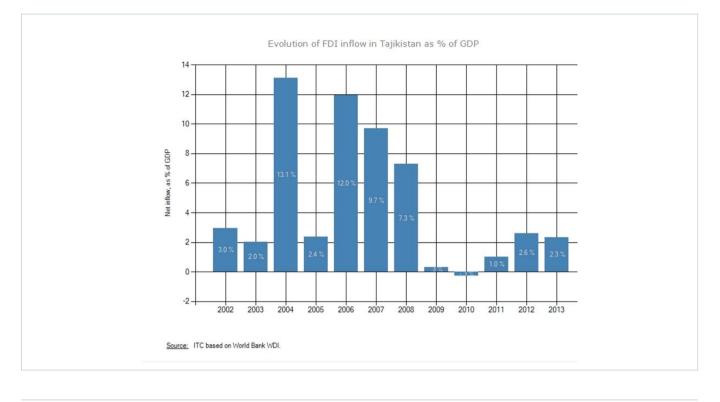


3.1.12 Composition of Trade in Services - Import





3.1.13 Evolution of FDI







3.2 Sector Trade Performance

3.2.1 Sectoral Diversification in Products - Export

Sector	Average Share of top 3 sector in detailed products country's (HS6) in sector's Sector's leading exported product HS6 exports exports 2009.			
	2009-	2009	2013	
Basic manufactures	55.9 %	99.0 %	99.4 %	760110 Aluminium unwrought, not alloyed
Fresh food	22.6 %	61.7 %	73.4 %	520100 Cotton, not carded or combed
Minerals	8.9 %	97.8 %	87.9 %	260700 Lead ores and concentrates
Unclassified products	4.7 %	100.0 %	99.7 %	9999999 Commodities not elsewhere specified
Clothing	1.9 %	92.1 %	90.8 %	620342 Mens/boys trousers and shorts, of cotton, not knitted
Textiles	1.4 %	79.2 %	66.3 %	520512 Cotton yarn,>/=85%,single,uncombed,714.29 >dtex>/=232.56, not put up
Processed food	1.2 %	65.1 %	67.8 %	200820 Pineapples nes.o/w prep or presvd,sugared,sweetened,spirited or not
Chemicals	0.9 %	62.3 %	51.7 %	390120 Polyethylene having a specific gravity of 0.94 or more
Leather products	0.6 %	92.8 %	92.6 %	$\underline{410411}$ Full grains, unsplit and grain splits, in the wet state "incl blu
Non-electronic machinery	0.4 %	34.2 %	64.9 %	843143 Parts of boring or sinking machinery, whether or not self- propelled
Miscellaneous manufacturing	0.3 %	71.2 %	48.5 %	490700 Unusd postage,revenue stamps;cheque forms,banknotes,bond certific,etc
Transport equipment	0.2 %	77.5 %	48.8 %	<u>870322</u> Automobiles w reciprocatg piston engine displacg > 100 to 1500 cc
IT & consumable electronics	0.2 %	59.5 %	69.3 %	847170 Computer data storage units
Electronic components	0.1 %	68.0 %	44.9 %	854231 Electronic integrated circuits as processors and controlli whether
Wood products	0.0 %	92.5 %	100.0 %	480256 Uncoated paper and paperboard, of a kind used for writin printing or

3.2.2 Sectoral Diversification in Products - Import

Sector	Average share of sector in country's imports 2009-	detailed (HS6) in	of top 3 products sector's orts	Sector's leading imported product HS6
	2003-	2009	2013	
Clothing	13.1 %	33.8 %	29.9 %	610423 Womens/girls ensembles, of synthetic fibres, knitted
Minerals	12.2 %	87.5 %	82.6 %	271019 Other petroleum oils and preparations
Basic manufactures	11.9 %	22.1 %	25.4 %	701349 Glassware for table or kitchen purposes (excl. glass hav linear c
Processed food	9.2 %	62.3 %	41.1 %	110100 Wheat or meslin flour
Textiles	9.1 %	36.2 %	34.6 %	630260 Toilet&kitchen linen, of terry towellg or similar terry fab, of cotton
Chemicals	6.5 %	32.5 %	25.4 %	300490 Medicaments nes, in dosage
Leather products	5.9 %	94.8 %	71.2 %	640510 Footwear with uppers of leather or composition leather,
Transport equipment	5.5 %	59.7 %	49.5 %	870323 Automobiles w reciprocatg piston engine displacg > 150 to 3000 cc
Miscellaneous manufacturing	5.2 %	26.0 %	24.0 %	711319 Articles of jewellry&pt therof of/o prec met w/n platd/clar prec met
Non-electronic machinery	5.1 %	12.6 %	14.9 %	842952 Shovels and excavators with a 360 revolving superstruct
Fresh food	5.0 %	76.7 %	80.5 %	100190 Wheat nes and meslin
Wood products	4.4 %	72.6 %	65.5 %	440710 Lumber, coniferous (softwood) 6 mm and thicker
Electronic components	2.8 %	24.2 %	23.8 %	853720 Boards,panels,includg numerical control panels,for a vol 1,000 V
Unclassified products	2.0 %	99.8 %	100.0 %	999999 Commodities not elsewhere specified
IT & consumable electronics	1.4 %	57.8 %	37.7 %	851762 Machines for the reception, conversion and transmission regeneratio
Source: ITC Trade Competitiveness Map. Note: HS codes refer to the revision 2007. Nes in product labels means not elsew Tailbictan has not var recorded its trad-		e full naried un	dar raviau and	Enurae are hazad an mirror etatizione /trada data reanned hu namer anuntrias)





3.2.3 Sectoral Diversification in Destinations - Export

Sector	Sector's export growth in value (% p.a)	Share of top 3 importing countries in sector's exports		List of the top 3 importing countries			
	2009- 2013	2009	2013	2009	2013		
Leather products	130.7 %	92.8 %	98.0 %	China ; India ; Turkey	China ; Turkey ; Alger		
Minerals	64.6 %	98.9 %	92.4 %	Kazakhstan ; China ; India	China ; Kazakhstan ; Ru Federation		
T & consumable electronics	62.6 %	78.6 %	98.7 %	Algeria ; Russian Federation ; Latvia	Algeria ; China ; United Ki		
Non-electronic machinery	40.8 %	73.9 %	93.7 %	Algeria ; Russian Federation ; Kazakhstan	Algeria ; Russian Federa Kazakhstan		
Inclassified products	21.9 %	77.4 %	91.1 %	Serbia ; Hungary ; Pakistan	Turkey ; United Kingdo United States of Ameri		
Textiles	17.4 %	94.0 %	72.2 %	Poland ; Russian Federation ; Algeria	Turkey ; Russian Federa China		
Wood products	8.9 %	99.3 %	97.3 %	Netherlands ; Russian Federation ; Algeria	Algeria ; Italy ; Turke		
Electronic components	8.4 %	78.3 %	81.0 %	Algeria ; China ; Germany	Algeria ; China ; Russi Federation		
Clothing	3.9 %	96.4 %	97.5 %	Italy ; Russian Federation ; Poland	Italy ; Russian Federati Algeria		
Basic manufactures	-2.2 %	66.3 %	90.1 %	China ; Turkey ; Norway	Turkey ; Greece ; Taiw Province of China		
Aiscellaneous manufacturing	-7.6 %	84.9 %	67.5 %	Russian Federation ; Poland ; Algeria	Russian Federation ; Alg Kazakhstan		
Fresh food	-8.9 %	88.9 %	77.5 %	Russian Federation ; Algeria ; Turkey	Turkey ; Kazakhstan ; Ru Federation		
Fransport equipment	-18.8 %	94.9 %	94.2 %	Algeria ; Russian Federation ; Kazakhstan	Algeria ; Russian Federa Germany		
Chemicals	-20.3 %	96.2 %	94.3 %	Algeria ; Australia ; Brazil	Algeria ; China ; Egy		
Processed food	-23.6 %	95.2 %	96.2 %	Kazakhstan ; Russian Federation ; Algeria	Algeria ; Kazakhstan ; Fr		

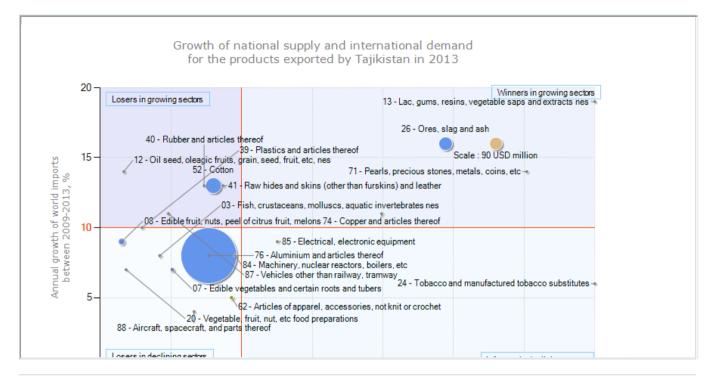
3.2.4 Sectoral Diversification in Destinations - Import

Sectoral diversification in				orts (mirror)	
Sector	Sector's import growth in value	supp count	of top 3 lying ries in imports	List of the top 3 supplying countries	
	(% p.a) 2009- 2013	2009	2013	2009	2013
Fresh food	22.1 %	75.6 %	80.6 %	Kazakhstan ; Brazil ; Russian Federation	Kazakhstan ; India ; Turkey
Electronic components	20.6 %	66.5 %	72.3 %	China ; Russian Federation ; Ukraine	China ; Russian Federation ; Turkey
Transport equipment	15.6 %	77.1 %	80.9 %	China ; Russian Federation ; Lithuania	China ; Lithuania ; Republic of Korea
Non-electronic machinery	15.3 %	65.4 %	80.6 %	China ; Russian Federation ; Germany	China ; Turkey ; Russian Federation
Wood products	14.9 %	90.3 %	89.6 %	Russian Federation ; China ; Turkey	Russian Federation ; China ; Turkey
Basic manufactures	14.2 %	93.3 %	93.0 %	China ; Russian Federation ; Kazakhstan	China ; Russian Federation ; Turkey
Chemicals	13.5 %	63.2 %	61.9 %	Russian Federation ; China ; Turkey	China ; Russian Federation ; Turkey
Minerals	13.3 %	99.2 %	98.1 %	Russian Federation ; Kazakhstan ; Ukraine	Russian Federation ; Kazakhstan ; Algeria

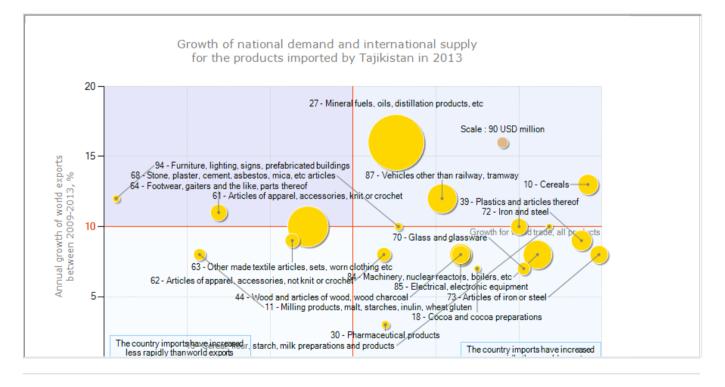




3.2.5 Sectors by World Demand - Export

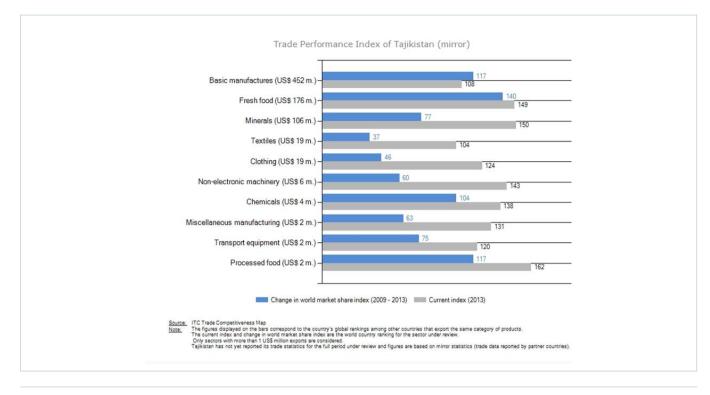


3.2.6 Sectors by World Demand - Import





3.2.7 Trade Performance Index







4. Trade Strategy and Policy

4.1 Trade and Development Strategies

Year	Strategy name	Sector
2010	Poverty Reduction Strategy Paper - 2010-2012 The document provides an overview of the results achieved through the 2007- 2009	
2009	UNDAF Tajikistan 2010-2015 The United Nations Development Assistance Framework (UNDAF) is aligned with the Millennium	
2007	National Development Strategy The National Development Strategy (NDS) is aligned with other national development policies,	
2006	National Sericulture Development Plan The plan has been developed by the Black, Caspian Seas and Central	Silk
2005	Trade Diagnostic Study - Tajikistan The Diagnostic Trade Integration Study (DTIS) provides an overview of the current	Electricity, Aluminium, Cotton, Textile Industry





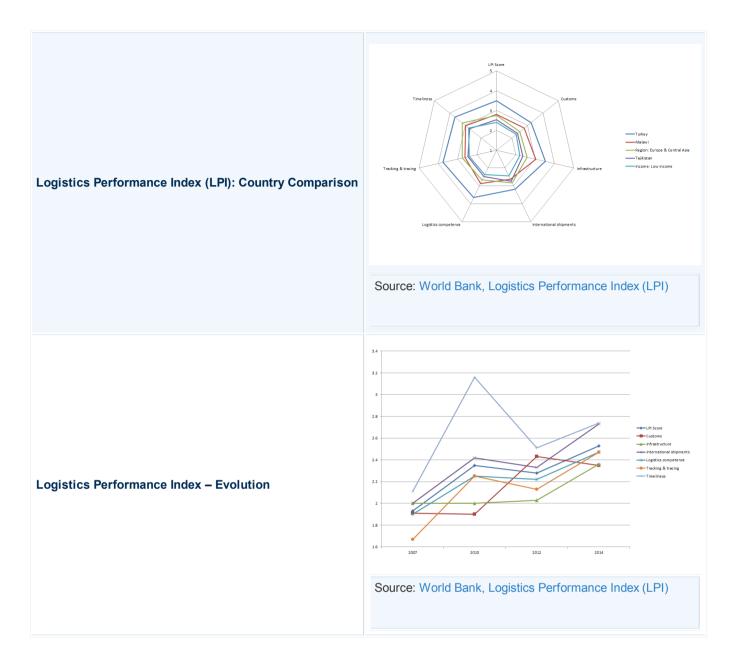
4.2 Domestic and Foreign Market Access

Overview: Trade Policy and Business Environment

INDICATOR, UNITS	RANK/132	SCORE
Domestic Market Access The pillar assesses the level and complexity of a country's tariff protection as a result of its trade policy. This component includes the effective trade-weighted average tariff applied by a country, the share of goods imported duty free and the complexity of the tariff regime, measured through tariff variance, the prevalence of tariff peaks and specific tariffs, and the number of distinct tariffs.	100	3.7214880755
Foreign Market Access The pillar assesses tariff barriers faced by a country's exporters in destination markets. It includes the average tariffs faced by the country as well as the margin of preference in destination markets negotiated through bilateral or regional trade agreements or granted in the form of trade preferences.	62	4.9752783356
Tariff rate (%) This indicator is calculated as a trade-weighted average of all the applied tariff rates, including preferential rates that a country applies to the rest of the world. The weights are the trade patterns of the importing country's reference group (2012 data). An applied tariff is a customs duty that is levied on imports of merchandise goods.	n/a	n/a
Complexity of tariffs , index 1-7 (best) <i>This indicator is calculated as the average of the following indicators: Tariff dispersion, Specific tariffs and Number of distinct tariffs. See description of each individual indicator for more details. Prior to averaging, values for each indicator were transformed to a 1–7 score, using the min-max method.</i>	59	6.1399304192
Tariffs dispersion (standard deviation) <i>This indicator reflects differences in tariffs across product categories in a country's tariff structure. The variance is calculated across all the tariffs on imported merchandise goods, at the 6-digit level of the Harmonized Schedule.</i>	39	7.2941055929
Tariffs peaks (%) This indicator is the ratio of the number of tariff lines exceeding three times the average domestic tariff (across all products) to the MFN (most-favoured nation) tariff schedule. The tariff schedule is equal to the total number of tariff lines for each country. These tariffs are revised on a yearly basis.	35	0.70782187976
Specific tariffs (%) This indicator is the ratio of the number of Harmonized System (HS) tariff lines, with at least one specific tariff, to the total number of HS tariff lines. A specific tariff is a tariff rate charged on fixed amount per quantity (as opposed to ad valorem)	80	1.8905116029
Number of distinct tariffs <i>This indicator reflects the number of distinct tariff rates applied by a country to its imports across all sectors.</i>	78	218
Share of duty-free imports (%) Share of trade, excluding petroleum, that is imported free of tariff duties, taking into account MFN tariffs and preferential agreements. Tariff data is from 2013 or most recent year available and imports data is from 2012	110	19.914788031
Tariffs faced (%) This indicator is calculated as the trade-weighted average of the applied tariff rates, including preferential rates that the rest of the world applies to each country. The weights are the trade patterns of the importing country's reference group (2012 data). A tariff is a customs duty that is levied by the destination country on imports of merchandise goods	110	5.838827532
Index of margin of preference in destination markets, 0-100 (best) <i>This indicator measures the percentage by which particular imports from one country are subject to lower tariffs than the MFN rate. It is calculated as the average of two components: 1) the trade-weighted average difference between the MFN tariff and the most advantageous preferential duty (advantage score), and 2) the ratio of the advantage score to the trade-weighted average MFN tariff level. This allows capturing both the absolute and the relative margin of preference.</i>	69	22.160219703
Source : World Economic Forum, Global Enabling Trade Report 2014		



4.3 Trade Facilitation







4.4 Business and Regulatory Environment

Multilateral Trade Instruments Instrument 77 / 266 instruments ratified : Ratification 29% rate : Weighted **37.4**/100 score : Abstract Weighted The Trade Treaties Map tool is a web-based system on multilateral Ratification Score trade treaties and instruments designed to assist trade support Rate Rank Rank institutions (TSIs) and policymakers in optimizing their country's legal framework on international trade In World : 147 / 143 / 193 193 In Region : Central **5**/ 6 **5**/ 6 Asia In Transition **27**/ 28 Development **27**/ 28 economy level : Tajikistan Patification rates (non weighted %) Country ratifications Average world ratifications WTO Contracts Customs Dispute resolution Graph Environment and products Human Rights and Labour Standards Presents a visual illustration breaking down a country's ratification level Intellectual property nsport and telecommunications according to various categories and compares it to the world average. Good Governance Products Institutional Participation Finance, payments and insolvency Investments Treaties law All categories 10 1 (C) Legacarta - ITC, 2014 Click here for a full list and more details about these Instruments ratified multi-lateral trade instruments





4.5 Infrastructure





5. ITC and the Country/Territory 5.1 ITC Projects

5.1.1 Current projects

Tajikistan: Strengthening export competitiveness of SMEs in the textile and clothing sector and enhancing trade support institutional capacities

Implementation of WTO provisions and business awareness of WTO Accession: Component Two

5.1.2 Recent projects

Trade Promotion in Tajikistan





5.2 Events

5.2.1 Upcoming events

No data

5.2.2 Recent events

Roundtable - Inclusive tourism and destination management in Tajikistan19/05/2014-Dushanbe





5.3 ITC Contacts

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6. Trade Information Sources and Contacts

6.1 Trade Information Sources

This section provides a list of country specific print and online publications on trade-related topics, including both ITC and external sources.

6.1.1 ITC publications

How to Approach Banks : A Guide for Tajikistan Entrepreneurs



Guide aimed at Tajik entrepreneurs explaining ways and means of obtaining trade credit from banks - addresses assessment of financial needs, payment methods and related credit facilities for trade transactions;...

Read more

Economic Cooperation Organization: Expanding Intra- Regional Trade - Contributing to Improve Healthcare Access in the ECO Region







Identifying Export Potential Among Selected Central Asian CIS Member Countries



Read more

Tajikistan: Supply and Demand Survey on Food and Beverages (Ref. BSM Food and Beverages, Kazakhstan 2003)



Read more

State of e-Business and Potential for Development in Tajikistan



Report assessing the e-preparedness of Tajikistan from the perspective of small and medium enterprises (SMEs) - reviews the e-business environment in the country and looks at the institutional and physical...





Buyers/Sellers Meeting on Food, Agricultural Products, Construction Materials and Equipment



Read more

Buyers/Sellers Meeting on Food and Beverages



Read more

Central Asia at the Crossroads of Foreign Trade: Opportunities and Challenges



Working document for the Technical Round Table Meeting, Almaty, Kazakhstan, 1-2 July 2003, addressing key issues in foreign trade development in Central Asia - reviews economic situation of Central Asian...





Export Quality Management : An Answer Book for Small and Medium-sized Exporters. - [Kazakhstan, Kyrgyzstan, Tajikistan, Uzbekistan]



Questions and answers on all aspects of quality control and management directed to exporters in Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan - covers technical regulations and standards, product certification, testing, metrology,...

Read more

Intra-Regional Trade Opportunities in Pharmaceutical Products



Read more

Tajikistan: Demand Survey on Pharmaceutical Products



Demand survey on pharmaceutical products in Tajikistan - examines the domestic pharmaceutical market, imports, legislative framework, regulations on medical products and goods registration; annexes include company profiles.





Identifying Intra-Regional Export Potential in Agro-Products and Processed Foods



Read more

Tajikistan: Supply Survey on Food, Agricultural Products, Construction Materials and Equipment



Survey on the supply of food, agricultural products, construction materials and equipment in Tajikistan - reviews the significance of these three product sectors to the economy of the country; examines...

Read more

Promotion and Development of Export-Oriented Joint Ventures Between Developing Countries and the Republics of the Commonwealth of Independent States



Compilation of papers presented at workshop organized by ITC in collaboration with Academy of Foreign Trade, in Moscow, 7-11 October 1991 - gives overview on joint ventures activities and their...





Digital Content : Trade in Sounds



Study focusing on the export potential of digital industries, including films, animations, pictures, photos, and particularly online music, in developing countries - addresses issues faced by the industry's stakeholders related...

Read more

Tajikistan : Trade-Related Technical Assistance : What Works and What Doesn't?



Paper presented at ITC Executive Forum : 'Business for Development : Implications for Export Strategy-Makers' , Cancún, Mexico, 6-9 September, 2003 - gives an overview of technical assistance programmes provided...

Read more

6.1.2 Selected printed information sources

- 2005 Europe and CIS's Telecommunication/ICT Markets and Trends
- 2007 Trade Facilitation in Selected Landlocked Countries in Asia
- 2000 Electronic Commerce for Transition Economies in the Digital Age: Forum Proceedings
- 2005 Central Asia Human Development Report : Bringing Down Barriers : Regional Cooperation for Human Development and Human Security
- 2010 Improving Border Management to Facilitate Trade in SPECA : Challenges and Prospects
- 2003 Trade Finance for Small and Medium-Sized Enterprises in CIS Countries
- 2011 Situation mondiale de l'alimentation et de l'agriculture
- 2012 Transition Report
- 2003 Tacis Regional Cooperation: Strategy Paper and Indicative Programme 2004-2006
- 2003 Towards a Knowledge-Based Economy: Tajikistan
- 2005 Cashmere Marketing : A New Income Source for Central Asian Livestock Farmers
- 2006 Welter F ... [et al.] Enterprising Women in Transition Economies
- 2006 Central Asian Republics: Gender Assessment Synthesis Report Mainstreaming Gender in Poverty Reduction Strategies in Four Central Asian Republics (Azerbaijan, Kazakhstan, The Kyrgyz Republic, Tajikistan)

- 2007 Sergi B S; , eds. Industries and Markets in Central and Eastern Europe
- 2000 Best Practice in Business Incubation
- 2010 Kaminski B, Mitra S Skeins of Silk : Borderless Bazaars and Border Trade in Central Asia
- 2007 Republic of Tajikistan Private Sector Development Strategy
- 1998 Trade and Investment Complementarities among the South-Western Member Countries of ESCAP



- 2011 Competitiveness and Private Sector Development : Central Asia 2011: Competitiveness Outlook
- 1994 Sources of European Economic and Business Information. 6th ed
- 2002 International Practice in Technology Foresight
- 2003 Women's Entrepreneurship in Eastern Europe and CIS Countries
- 2009 Investment Guide to the Silk Road
- 2004 Access to Financing and ICT for Women Entrepreneurs in the UNECE Region
- 2009 Trader's Manual for Landlocked Countries : Tajikistan
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- Russian Union of Exhibitions and Fairs (RUEF)
- Georgian National Investment Agency



- Times of Central Asia
- Shanghai Cooperation Organisation (SCO)





6.2 Trade Contacts

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