



GEOPOLITICS IN THE REGION: RISKS AND PROSPECTS FOR ENSURING FOOD SECURITY IN THE KYRGYZ REPUBLIC

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ABSTRACT

This research explores the determinants influencing the economic progress of the Kyrgyz Republic within the context of interregional disputes. Situated in Central Asia, the Kyrgyz Republic is a landlocked nation sharing borders with Kazakhstan, Uzbekistan, Tajikistan, and China. Due to its strategic location and proximity to major powers, this region has a history marked by diverse geopolitical influence. Recent local changes stemming from sanctions imposed on the Russian Federation necessitate an examination of strategic concerns in the politico-economic dynamics of the region, specifically in the realm of food security. It is noteworthy that food security represents a multifaceted issue encompassing not only agriculture but also the economic, social, and political dimensions. A country's ability to ensure food security can be influenced by its geopolitical circumstances. To provide the most current and reliable insights on this subject, this research references the latest reports and open data from international organizations, government bodies, and research institutions specializing in agriculture and food security matters within the Kyrgyz Republic and the broader Central Asian region. Geopolitical instability, in the event of an escalating Russia-Ukraine conflict, may give rise to heightened tensions in the broader region, potentially impacting neighboring nations, such as Kyrgyzstan, which could experience increased uncertainty, diplomatic strains, and regional conflicts that may disrupt the economic well-being of its population. This research scrutinizes the risks and potential opportunities regarding the economic development and food security of the Kyrgyz Republic.



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1. INTRODUCTION

Globalization, rapid political transformations, continuous labor and capital migration, and contemporary international economic cooperation make it impossible for any country to remain unaffected to

some extent when regional conflicts arise. Countries that depend on the import of agricultural products and food are particularly at risk. The Kyrgyz Republic faces vulnerabilities due to its reliance on other nations.

This research examines the factors driving Kyrgyzstan's dependence on food imports, analyses the risks associated with regional conflicts and international sanctions, and considers potential economic prospects that can help the country choose a safer and more prosperous path that can help the country embark on a path of security and prosperity. Understanding the challenges and opportunities ahead, Kyrgyzstan endeavors to develop a strategy to strengthen its food security, economic resilience, and overall well-being in a complex global landscape.

2. METHODOLOGY OVERVIEW

The methodology's core objective is to evaluate economic risks and potential opportunities within the Kyrgyzstan context, especially considering regional conflicts and concerns related to food security. This research will primarily concentrate on four key areas: (1) factors of dependence, (2) disruptions in trade and pharmaceuticals, (3) the repercussions of Russia's economic crisis and labor migration, and (4) the exploration of possibilities for growth in foreign investments, trade advancements, and the thriving tourism sector. The methodology delineates a systemic approach for collecting, analyzing, and interpreting data to conduct a comprehensive assessment.

3. APPROACH TO RESEARCH

The research will employ a mixed-methods approach, encompassing quantitative and qualitative data collection techniques to ensure a comprehensive examination.

Primary data sources will encompass official statistics obtained from institutions such as the National Statistical Committee of the Kyrgyz Republic, the Ministry of Labor, Social Welfare, and Migration, the National Bank of the Kyrgyz Republic, and the Department of Tourism of the Kyrgyz Republic.

The research will encompass data spanning the past five years, allowing for an in-depth analysis of trends and shifts within Kyrgyzstan's economic landscape.

3.1. Risk Assessment

1. Evaluating the impact of regional conflicts, sanctions, and geopolitical tensions on Kyrgyzstan's economy, specifically focusing on trade disruptions, the banking sector, and labor migration;
2. Analyzing the potential risks associated with reliance on imports for essential food products and exploring the consequences of regional conflicts on food security.

3.2. Potential Prospect Assessment

1. Assessing the recent growth in foreign investments and portfolio inflows, identifying key sectors and industries attracting investments, and determining their potential impact on the Kyrgyz economy.
2. Examining the role of Kyrgyzstan as a re-export hub and analyzing trade dynamics with neighboring countries, especially in light of the regional conflicts;
3. Analyzing the growth in tourism, particularly from Russian tourists, and understanding its contribution to economic development.

3.3. Interpretation and Recommendations:

1. Integrating the results from the risk assessment and prospects analysis to provide a comprehensive understanding of the economic situation in Kyrgyzstan;
2. Based on the study's findings, proposing evidence-based recommendations and policy suggestions to mitigate economic risks, enhance food security, and capitalize on potential growth opportunities.

3.4. Limitations:

1. Potential limitations arising from the availability and reliability of data from official sources;
2. Findings may not be fully applicable to other contexts beyond Kyrgyzstan;
3. The period selected might affect the depth of the analysis, restraining the years that could be within the sample size affects the accuracy in predicting potential economic outcomes.

3.5. Reporting and Dissemination:

1. Preparing a research report that includes all relevant findings, analysis, and recommendations;
2. Disseminating the research findings through academic journals, policy briefs, and presentations to relevant stakeholders and the wider public.

4. DEPENDENCY FACTORS

Russia exports such vital foodstuffs as vegetable oil, flour, and various cereals to Kyrgyzstan. Russia is the main supplier of these products. Thus, Kyrgyzstan is directly dependent on supplies from the Russian Federation.

According to a report by the United Nations World Food Programme, as of November 2022, the imports for essential food items (95% of wheat, 81% of vegetable

oil, and 99% of sugar) were supplied by the Russian Federation (World Food Programme, 2022, November 4). This trend has continued well into 2023, where Russia supplied 97% of imported wheat, 80% of imported vegetable oil, and 49% of imported sugar, as per data from January to March in 2023 (World Food Program, 2023). This dependency puts Kyrgyzstan at significant risk, particularly when Russia is embroiled in a conflict that can disrupt these essential supplies. Furthermore, between January and August 2022, the Kyrgyz Republic experienced a 15.6% rise in the Consumer Price Index (CPI) for all goods and services. During the same period, the index for essential foods specifically increased by 20.3% compared to August 2021 (US Embassy in The Kyrgyz Republic, 2022). Unfortunately, the trend seems to indicate that prices of all food products essential to the population's health are steadily increasing, which is related to three important factors called "dependency factors."

4.1. Insufficient Development of Agricultural Clusters and Reliance on Food Imports

Despite its unique climatic conditions and geographical location, the Kyrgyz Republic has struggled to adequately develop its agriculture and food industry over the past three decades of independence. Insufficient attention, resources, and investment have been dedicated to the field of agricultural sciences.

The agricultural sector lacks advanced machinery and often uses obsolete Soviet-era machines; the share of manual labor in agriculture is still high.

Consequently, Kyrgyzstan experiences lower yields compared to its potential in agricultural production. The production of key crops like apples, apricots, cherries, sugar beets, beans, cotton, tobacco, and walnuts remains predominantly regional and small-scale when contrasted with Western standards (International Trade Administration, 2022). Furthermore, the Kyrgyz Republic's limited access to high-quality seeds, fertilizers, and inefficient irrigation systems underscores the sector's heavy reliance on weather conditions, rendering it vulnerable to the impacts of climate change.

In contrast, several neighboring countries of Kyrgyzstan, including Kazakhstan and Uzbekistan, have long implemented successful agricultural clusters. Notable achievements include meat and rapeseed clusters in Kazakhstan and the establishment of clusters for vegetable oil production and fruit crop cultivation in Uzbekistan. Notably, Uzbekistan ranked among the top ten countries in the past year for exporting fruits and berries to Persian Gulf states.

The progress and prosperity achieved in agriculture enable Kazakhstan and Uzbekistan to provide their populations with domestically produced and locally sourced food products while actively engaging in food

exports. Kyrgyzstan currently lacks any fully established agricultural clusters, leading to a heavy dependence on food imports from other nations.

4.2. Impact of the Growing Population

The expanding population in the Kyrgyz Republic further complicates the task of ensuring food security. As of 2022, the country's population stands at approximately 6.8 million, with a growth rate of 1.7%. This growth rate has experienced fluctuations due to various factors, including internal upheavals, financial instability, and the impact of the COVID-19 pandemic (Knoema, 2022). The increasing population inherently leads to heightened demand for sustenance, exacerbating existing vulnerabilities in food security by placing additional pressure on local agricultural production and food imports.

Food pricing is primarily influenced by producers and is also subject to the market forces of supply and demand. With the ongoing population growth, the demand for essential food items such as vegetable oil, grains, and wheat remains consistently high. Consequently, Kyrgyzstan finds itself in a situation where it has limited alternatives but to procure these vital commodities at prices determined by suppliers.

4.3. Impact of Regional Conflicts

Regional conflicts have political and economic consequences, which are felt by countries directly involved in the conflict itself and the countries that maintain neutrality. The prices for essential food items at the beginning of 2022 are significantly higher than the prices reported in 2021, which is attributed to the conflict's escalation. As of March 2022, the price of wheat was 31 KGS, which was 27% higher compared to March 2021 (World Food Programme, 2022, March 11). This is also observed in the prices of cooking oil, sugar, and potatoes between March 2022 and March 2021, with price increases of 8%, 12%, and 20%, respectively (World Food Programme, 2022, March 11). Furthermore, since the Russian Federation and Ukraine "account for 29% of global wheat exports" and "80% of sunflower oil exports," the conflict and related supply chain disruptions have "pushed up global food prices," also contributing to the increased prices found in the Kyrgyz Republic (World Food Programme, 2022, March 11). The combination of increased food prices, decreased supply, and devaluations in the domestic currency illustrates the effects of the Russia-Ukraine conflict on issues with food security in Kyrgyzstan quite clearly, affecting the quantity of the import received and the price at which it is distributed in Kyrgyzstan. Furthermore, Russia limited its export of essential food products due to the need to ensure its local population would have access to wheat and vegetable oil. Consequently, the prices of these two products in

Kyrgyzstan increased by 70%–80% almost instantly (Asian Development Bank, 2023).

To mitigate the three dependency factors, it is necessary to make strides toward agricultural development, specifically by implementing agro-clusters, which will ultimately ensure food security for the Kyrgyz Republic.

There are more than one million Kyrgyz citizens in the Russian Federation who moved to Russia in search of employment and are labor migrants, as evidenced by the official data of the Ministry of Labor, Social Protection, and Migration of the Kyrgyz Republic.

Within the last five years, Kyrgyz migrants have sent average remittances of approximately \$2.5 billion, of which 98% are sent from Russia (Ruslanova, 2022). This means that any temporary restrictions or financial sanctions imposed against the Russian Federation will ultimately affect Kyrgyzstan. Additionally, due to the natural-climatic characteristics of the country, its geographical location, and the current unstable political situation in the region, some factors directly influence the development of various sectors of the country's economy and the overall living standards of the population.

5. ECONOMIC RISKS

The following factors may negatively influence the current economic development of Kyrgyzstan:

5.1. Trade Disruptions and Pharmaceutical Challenges

In terms of geographical proximity, Kyrgyzstan is situated far from Ukraine and its conflict zone, resulting in minimal Ukrainian refugee influx. Trade relations with Ukraine have been relatively unaffected, albeit the trade volume has never been substantial. For instance, in 2020, as reported by the National Statistical Committee of the Kyrgyz Republic (NSC), Kyrgyzstan exported goods to Ukraine valued at a mere \$8.6 million while importing goods amounting to \$51.7 million from Ukraine (National Statistical Committee of the Kyrgyz Republic, 2021).

Nonetheless, it is crucial to acknowledge Ukraine's significant role in the pharmaceutical sector, particularly in producing medical equipment and medications. Local representatives of the pharmaceutical industry have expressed concerns that the ongoing regional situation may lead to interruptions in the supply of specific medicines and medical equipment.

5.2. Banking Sector and Migrant Remittances

A crucial and impactful factor to consider is the economic sanctions imposed by the EU and the USA on Russia. These sanctions represent the most extensive

and far-reaching economic sanctions in contemporary international relations. There are approximately 5000 sanctions placed on Russia, covering various areas such as banking, migration, customs, visas, and more. This has earned Russia the unenviable distinction of being the most sanctioned country globally.

The initial and most impactful sanctions targeted Russia's financial and banking systems, followed by restrictions on importing advanced technology, military equipment, and the energy sector. Notably, some of Russia's largest banks were disconnected from the SWIFT international banking system. Kyrgyzstan was among the first nations to feel the repercussions of these sanctions, particularly within its banking sector. Consequently, Kyrgyz labor migrants encountered significant challenges in transferring funds back to their home country. It is estimated that up to 25% of Kyrgyzstan's working-age population, aged 25 to 40, work and reside in major Russian cities. Data from the Ministry of Labour, Social Welfare and Migration of the Kyrgyz Republic reveals that labor migrants have been sending approximately \$2.5 billion annually to Kyrgyzstan over the past three to four years, with nearly 95% of these remittances originating from Russia (Ministry of Labour, Social Welfare and Migration of the Kyrgyz Republic, 2022).

Remittances constitute a particularly vital component of the Kyrgyz economy. The immediate impact of sanctions against Russia led to a halt in economic growth within the country. In turn, this resulted in reduced employment opportunities for Kyrgyz migrants, leading to fluctuating remittances for their families back home. The direct consequence of this conflict has created pressing issues in Kyrgyzstan, with the population facing declining household income at a time when essential food prices are steadily increasing. The downturn in remittances affects the nation's foreign currency reserves and directly hinders the average family's ability to afford even basic food items, thereby exacerbating existing food security challenges.

5.3. Russia's Economic Crisis and Labour Migration

The third group of factors poses the greatest threat to Kyrgyzstan, which is the economic crisis in Russia as a result of various sanctions and political-economic isolation. The Russian Federation has always been and remains the largest trade and economic partner of Kyrgyzstan and the main recipient of labor migrants. A huge number of enterprises have oriented their production towards the Russian market and Russian consumers, including the textile sector, fish farms, and agricultural enterprises. Open data from the National Statistical Committee of the Kyrgyz Republic state that the Russian Federation is among the top five countries in terms of trade volume, along with China, Turkey, and Kazakhstan. The volume of foreign trade (imports and

exports of various products) has been increasing annually.

The economic crisis is a complex set of problems. It will affect the purchasing power of Russian citizens, decrease the demand for goods and products manufactured in Kyrgyzstan, and lead to job cuts in major cities of Russia, which, in turn, will result in the return of Kyrgyz labor migrants. Kyrgyzstan cannot provide jobs for the returning citizens. Consequently,

the number of unemployed individuals will increase. Subsequently, the level of living standards will decrease due to unemployment.

Unfortunately, in addition to the rise in food prices, the poverty level in Kyrgyzstan has also increased over the past five years, as shown in Figure 1. There is a noticeable upward trend in poverty levels in almost all regions of the country.

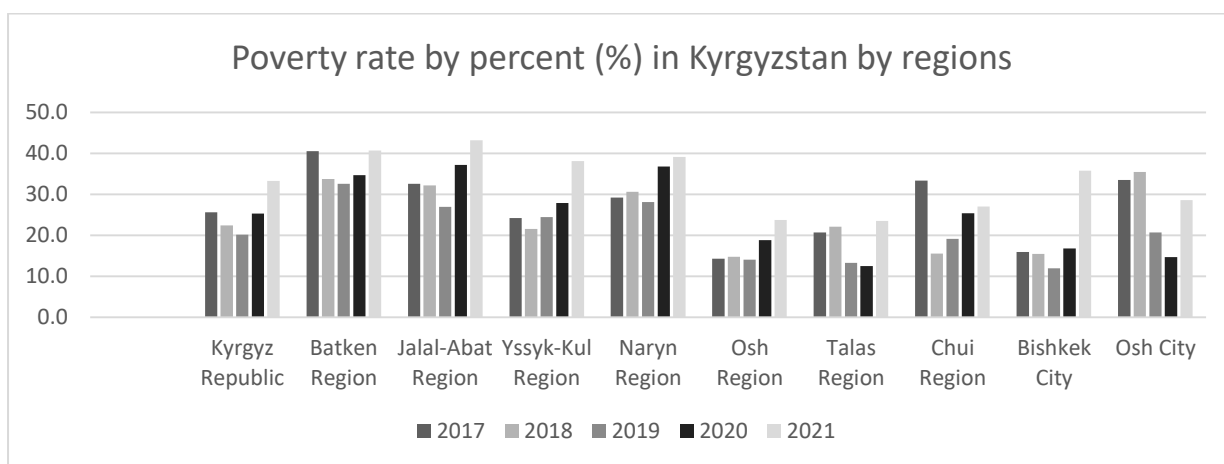


Figure 1. Poverty rate by percent (%) in Kyrgyzstan by regions. (Compiled by the authors based on National Statistical Committee of the Kyrgyz Republic, 2021)

The consequences of the economic crisis in Russia caused by sanctions may lead to a wave of job cuts due to the closure of enterprises. It can be expected that migrants will be among the first to be made redundant, which may provoke the return of Kyrgyz citizens to their home country. This, in turn, may lead to an increase in unemployment. Thus, it can be concluded that the sanctions imposed against Russia will eventually affect the economy of Kyrgyzstan as a whole and will have a negative impact on it.

6. POTENTIAL ECONOMIC PROSPECTS

6.1. Growth in Foreign Investments and Trade Evolution

Since the onset of 2023, there has been a notable upward trend in the volume of direct Russian investments, nearly doubling in size. This unexpected development can be attributed to the regional conflict and the subsequent migration of Russian citizens to Central Asian nations, particularly the Kyrgyz Republic. This migration has brought about an unanticipated benefit in the form of substantial financial investments and the relocation of highly skilled professionals from diverse fields to the Kyrgyz Republic.

Notably, following the outbreak of the conflict, a considerable number of Russian companies have chosen to relocate their offices and employees to Kyrgyzstan. According to official data from the High Technology

Park of the Kyrgyz Republic, approximately 60 companies and individual entrepreneurs from Belarus, Russia, and Ukraine were registered within the first six months of 2022. What is particularly heartening is that Kyrgyzstan has gained a reputation for being a tolerant and hospitable country, attracting a significant influx of skilled professionals from these mentioned countries. This influx of skilled professionals and increased investment represents a positive turn of events for Kyrgyzstan, bolstering its economic prospects and fostering international cooperation in various sectors. Representatives of companies, such as “Chuprin and Partners,” “SmartLab,” and the Russian branch of “Apple,” have reported the relocation of their offices and employees to Kyrgyzstan. Furthermore, “Wildberries” has significantly expanded its workforce. Key factors influencing foreign investments in Kyrgyzstan include the country’s potential in mining (especially gold), efforts to improve the business climate, and participation in regional economic initiatives. The government has been working to streamline regulations, enhance investor protection, and create more favorable conditions for foreign investors. Bilateral and multilateral agreements have also played a role in facilitating investments.

In 2022, there was a noticeable increase in labor migration, capital flow, and intellectual property transfer from Russia, Ukraine, and Belarus to Kyrgyzstan, with similar significant trends observed in Kazakhstan. Statistics from the NSC suggest that the

volume of investment in the form of financial contributions exceeded \$130 million in 2022, which is ten times higher than in 2020 (National Statistical Committee of the Kyrgyz Republic, 2022).

According to data provided by the National Statistical Committee (NSC), Kyrgyzstan has witnessed not only an increase in foreign direct investments but also

substantial growth in portfolio investments (Figure 2). Notably, portfolio investments have had a significant impact on the country’s banking sector, with foreign companies acquiring shares in several Kyrgyz banks. Additionally, there has been a rise in the share of foreign investments in the construction sector.

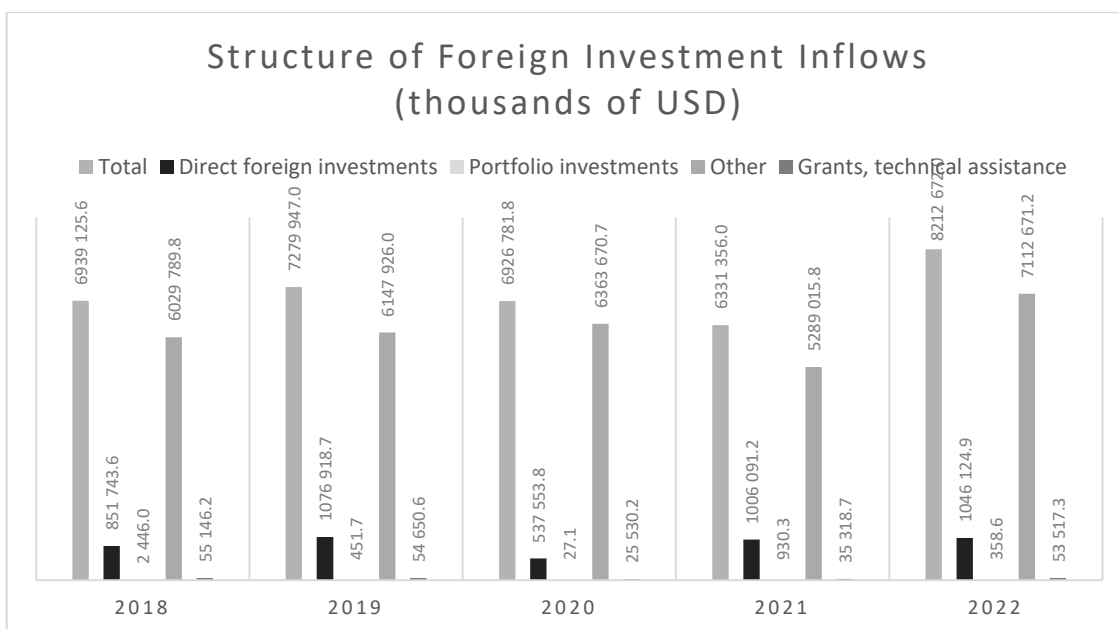


Figure 2. Structure of foreign investment inflows (thousands of USD).
(Compiled by the authors based on National Statistical Committee of the Kyrgyz Republic 2022)

The influx of specialists from Russia, Belarus, and Ukraine, along with the transfer of businesses to Kyrgyzstan, has spurred a notable surge in demand for both residential and commercial real estate, effectively bringing the real estate market back to pre-pandemic levels. This uptick in portfolio investments and the expansion of the real estate sector underscore the growing confidence in Kyrgyzstan’s economic potential and its appeal as a destination for foreign investments.

6.2. Leveraging Geographical Location as a Re-export Hub

The foreign economic activity and trade turnover of Kyrgyzstan are undergoing significant evolution. There are two important directions in foreign trade: export and re-export, which serve as a stimulus for the serious development of the transportation and logistics sectors of the country. Currently, the Kyrgyz Republic holds great prospects in the transportation of goods, as it serves as a link between the Russian Federation and China. Up to 80% of re-exported products pass through Kyrgyzstan. Data shows that exports to Russia doubled, and imports from China almost tripled; products never traded by Kyrgyzstan before were exported (Aibashov et al., 2023). In this specific case, Kyrgyzstan’s geographical location presents a unique opportunity to

become a logistical hub in the region. It is necessary to thoroughly and comprehensively explore all possibilities for creating a re-export corridor, taking Turkey as an example. Against the backdrop of the conflict in Ukraine, the volume of goods and products exported to Russia has halved, while imports from China have almost tripled. In 2022, when the Russian Federation faced harsh sanctions and various restrictions, the foreign economic activity and trade turnover of Kyrgyzstan, on the contrary, experienced a significant positive surge. This is primarily associated with the increase in the scale of re-export, a process where exported imported goods and products are promptly delivered to consumers.

Kyrgyzstan’s membership in regional organizations such as the Eurasian Economic Union (EAEU) has influenced its trade policy and relations. The EAEU promotes economic integration and cooperation between its member states, which also positively influences the dynamics of trade in Kyrgyzstan.

6.3. Booming Tourism Industry

Kyrgyzstan has experienced an unprecedented tourism boom, primarily driven by a substantial influx of Russian tourists. According to data from 2022, the

Kyrgyz Republic has emerged as the leading tourist destination for Russian tourists in Central Asia. Analysts project that in 2023, Kyrgyzstan will maintain its top position in the region, with an expected increase in the number of Russian tourists by as much as 40% or more.

In 2022, based on booking data from various online platforms, Russian tourists predominantly chose three main destinations. The first was Turkey, accounting for 18% of total bookings. The second was the Kyrgyz Republic, representing just over 12% of the total number of sold tour packages. The third was Armenia. Official data from the Department of Tourism of the Kyrgyz Republic estimated that in 2022, over six million foreign tourists visited the country, with five million of them coming from Russia, Kazakhstan, and Uzbekistan combined. During the first nine months of 2022, the tourism sector contributed 643 million 740 thousand soms to the state budget (Department of Tourism of the Kyrgyz Republic, 2022).

This remarkable surge in demand from Russian tourists for Central Asian countries, especially Kyrgyzstan, can be attributed to the travel restrictions imposed by many countries on Russia. However, it is worth noting that previously popular destinations for Russian citizens, such as Egypt, the UAE, Thailand, and Turkey, have experienced reduced demand, even without imposing restrictions. This shift in preferences could be linked to a changing travel landscape, as “beach tourism” has become less appealing, while “eco-tourism” has gained prominence. The rise of eco-tourism, particularly after the COVID-19 pandemic, reflects a shift in people’s values and consciousness when it comes to travel choices.

We can also mention the following factors that can further increase the volume of tourists from Russia:

1. Geographical proximity: Kyrgyzstan’s proximity to Russia makes it an easily accessible and affordable destination for Russian tourists;
2. Natural beauty and outdoor activities: Kyrgyzstan is known for its stunning landscapes, including mountains, lakes, and vast wilderness areas. This appeals to nature enthusiasts, trekkers, and adventure seekers, which can attract a diverse range of tourists;
3. Cultural interest: Kyrgyzstan has a rich cultural heritage, including traditional nomadic customs, art, and crafts. This can be of interest to tourists looking to experience unique cultures and traditions;
4. Increasing awareness: effective marketing campaigns, social media, and travel platforms could have helped raise awareness about Kyrgyzstan as a tourist destination, particularly among Russian travelers;

5. Visa policy: favorable visa policy or simplified entry procedures for Russians can encourage more people;
6. Economic factors: economic factors, such as favorable exchange rates as the Russian ruble and Kyrgyz som have a near-perfect one-to-one (1:1) exchange rate and experience similar fluctuations or economic difficulties, might make traveling to Kyrgyzstan more attractive for Russian tourists;
7. Infrastructure improvements: investments in tourism-related infrastructure, accommodation, and services could enhance the overall tourist experience and contribute to increased visitor numbers;
8. Word of mouth: positive experiences of early visitors, shared through word of mouth or social media, could have acted as a catalyst for attracting more tourists.

It is important to highlight that tourism is a vital sector of Kyrgyzstan’s economy, encompassing various industries such as transportation companies, the hospitality business, the food and beverage industry, the production of local food and beverages, craftsmanship, and more. Tourism stimulates the development of rural areas and creates job opportunities in remote regions of the country.

7. RESULTS

Analyzing the consequences of the regional conflict between the Russian Federation and Ukraine, the following conclusions can be drawn:

1. The consequences of the conflict have highlighted how dependent Kyrgyzstan is on external food supplies. It is crucial for the country to urgently take measures to develop its food industry, which will ensure food security;
2. “Every cloud has a silver lining.” Due to the conflict in the region, many specialists and companies from Russia, Ukraine, and Belarus have chosen Kyrgyzstan as a location for further development and scaling. This means an influx of investments and highly skilled professionals in various fields of activity;
3. As a result of imposed sanctions, Russian tourists have been increasingly choosing Kyrgyzstan as a top travel destination. The development of tourism is one of the key sectors of the economy in the republic.

The quality and standard of living of the population are crucial indicators of economic development in the country. Therefore, to improve the population’s living standards, it is necessary to focus on the country’s existing geographical and natural-climatic potential and strengthen and implement new developments in these sectors with adequate financing.

8. CONCLUSION

Kyrgyzstan faces a challenging economic landscape influenced by globalization, regional conflicts, and food import dependency. To mitigate these challenges, the country must prioritize agricultural development through robust agro-clusters, enhancing food security and reducing import reliance.

Amidst the challenges, Kyrgyzstan also enjoys economic opportunities, such as growing foreign investments and a thriving tourism industry. Leveraging its strategic location, the country can emerge as a re-export hub, stimulating trade and transportation sectors. To secure a prosperous future, Kyrgyzstan needs sustainable policies that promote self-sufficiency, diversification, and inclusive growth. By taking proactive measures, the nation can navigate evolving global dynamics and build resilience for long-term stability and prosperity.

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