



Food and Agriculture Organization of the United Nations

Hand-in-Hand Initiative

Tajikistan

Opportunities to Investment for High Value Agrifood Commodities

2026

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Overview

Overview Tajikistan economy and agrifood systems

Enabling sustainable investments

Investment opportunities

Tajikistan's strategic location in the heart of Central Asia provides it with proximity to major food consumer markets.

Tajikistan Overview (2025)

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8.4%
Economic Growth

10,72 M
Population

173 billion
TJS (16.4 bln. USA)

Agriculture 22%
to GDP

1,644 USD
GDP per capital

19% of exports - Agri products

74% of population live in rural areas

Over 60% population works in agriculture

Over 50% of agricultural workers women

2.0% population growth (annual)

19% National Poverty rate

2.0%
Unemployment rate

Ag. land: 34% of total land (4.6 M ha); Arable land 0.85 M ha

69% of arable land irrigable

4063 ha
Land Reclamation*

60% of Central Asia water resources

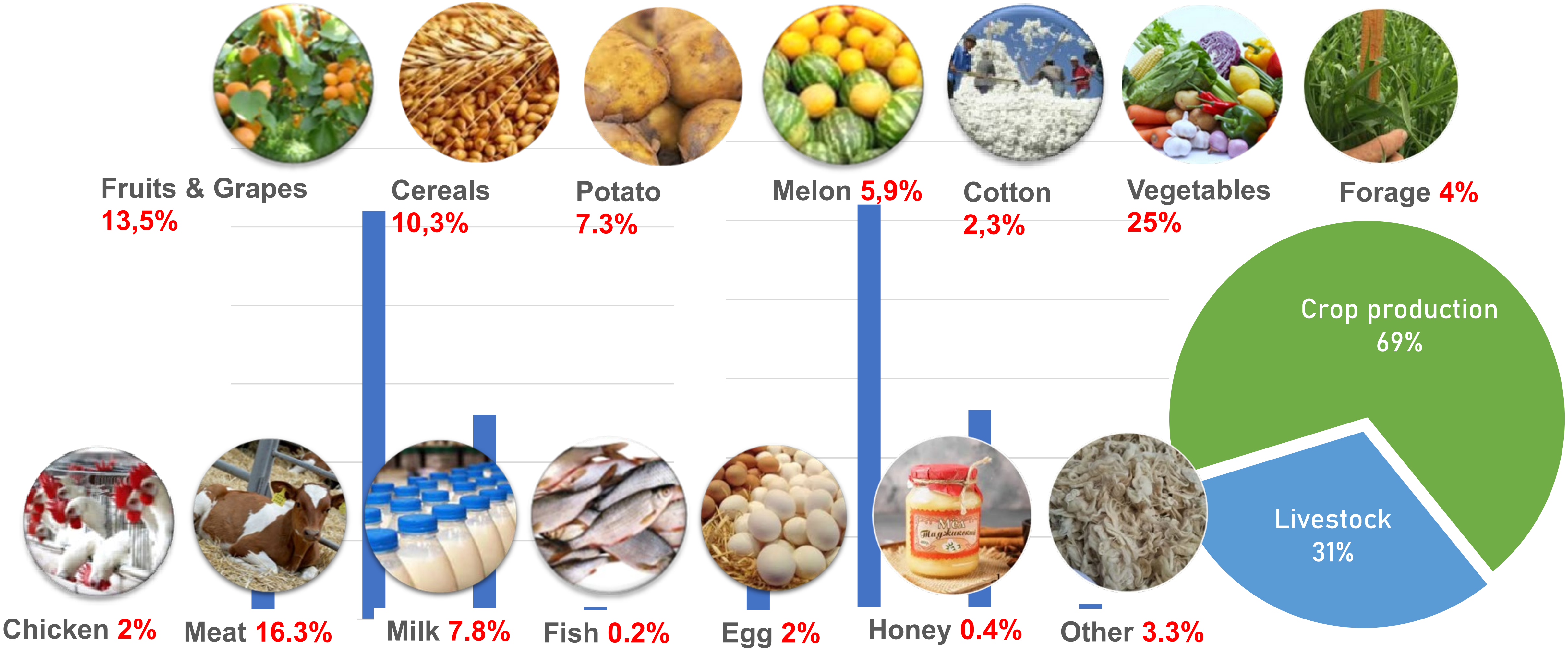
98% green energy

CO_2

9.05 t mln.
Gas emissions**

Source: Agency on Statistics

Agrifood system of Tajikistan (2024 TBC)



Source: Agency on Statistics

Agriculture export (2025)

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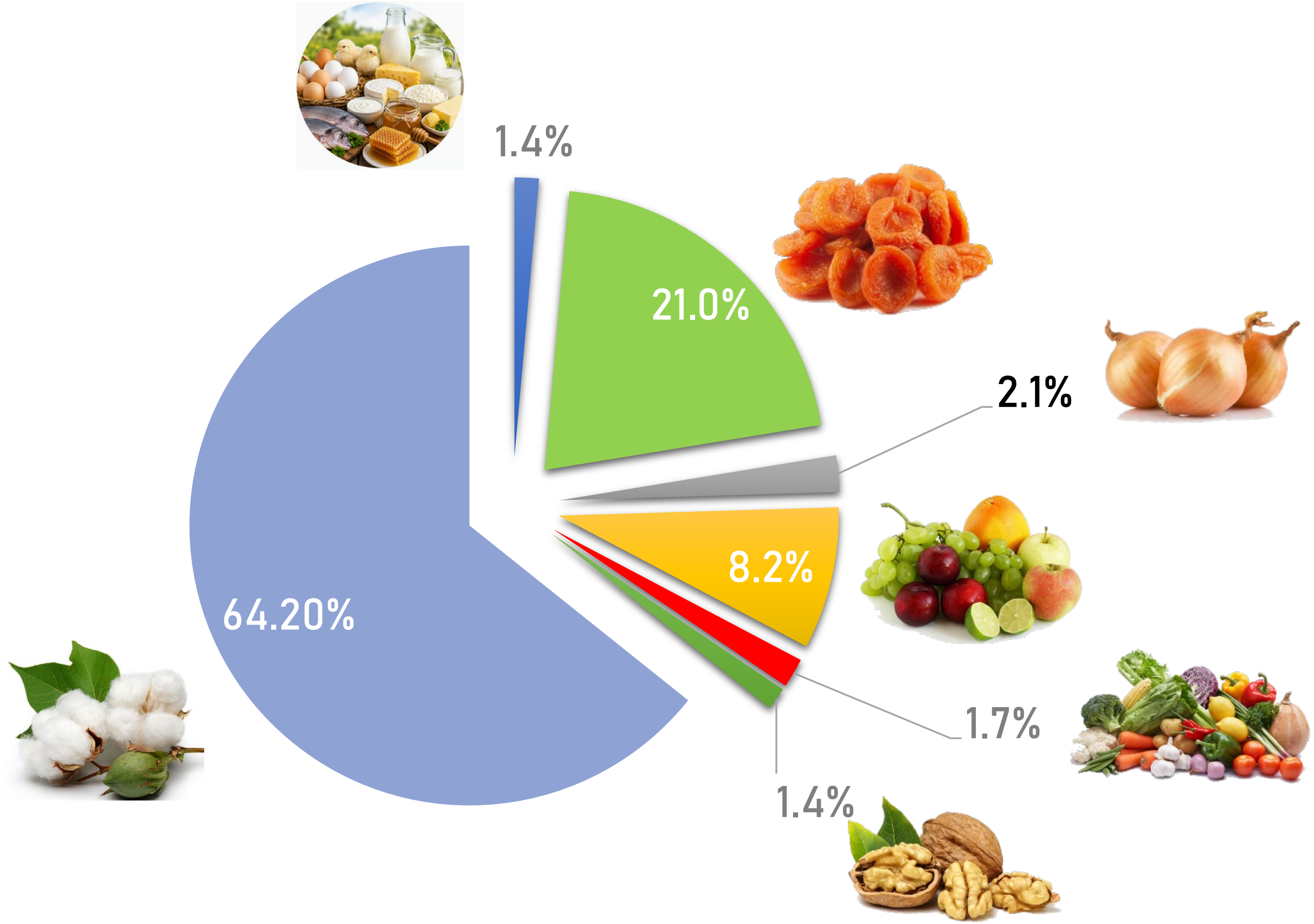


Opportunity

Opportunity to supply earlier fresh products

2 weeks

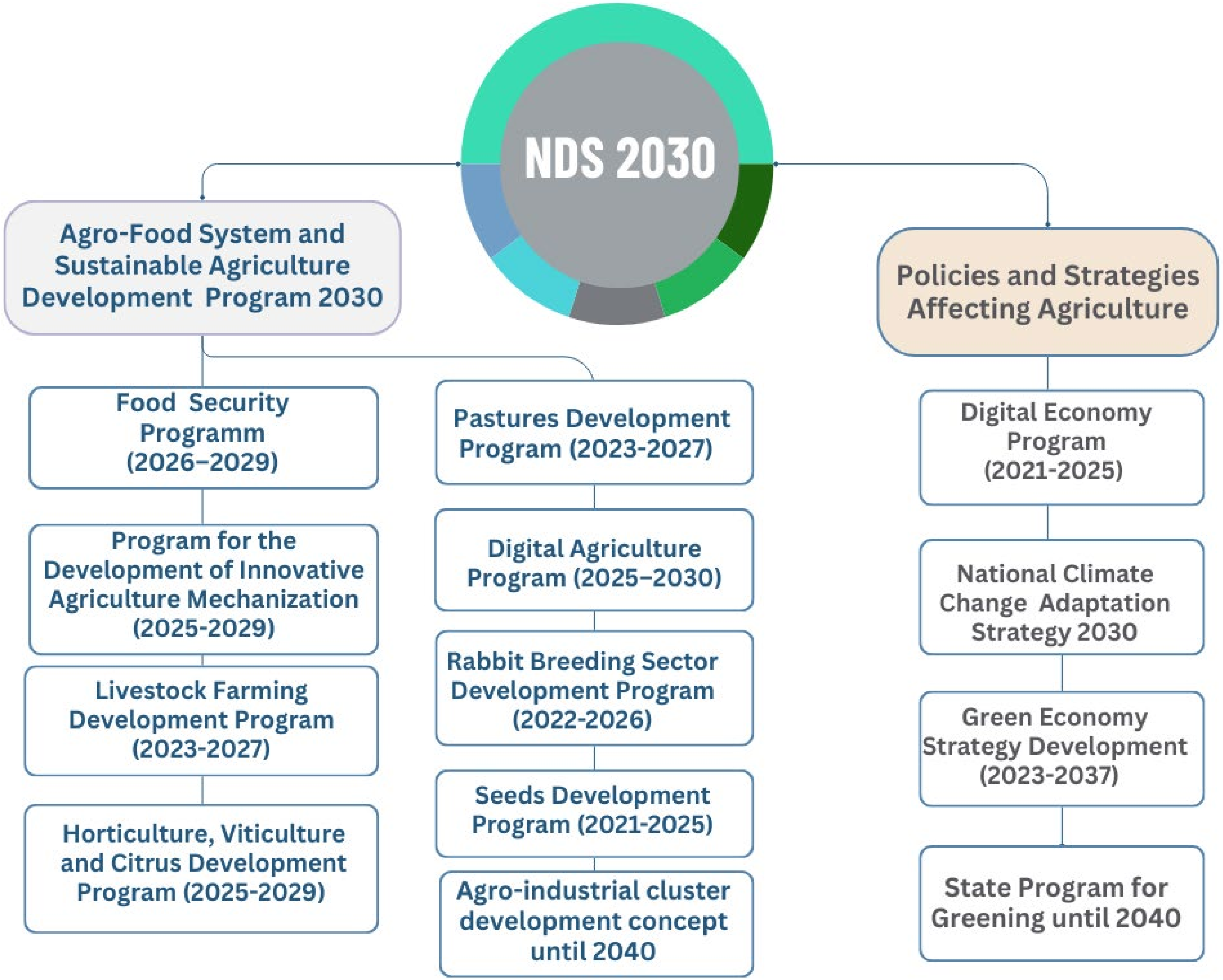
before neighboring countries

Source: Agency on Statistics

Agriculture Government Focus

National Development Strategy 2030:

Agriculture is vital for food security and sustainable development through diversification, innovation, and stronger value chains.



Tajikistan economy

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Creating a Favorable Investment Climate: Progress on Reforms

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A set of action plans has been formulated to boost the investment climate across the economy, with a specific focus on bringing AI to the production sector.

Public–Private Dialogue (PPD) platforms are being established at multiple levels to foster government & businesses collaboration

Ongoing regulatory reforms aim to reduce the number of permits and licenses required, streamlining administrative procedures.

Public service delivery has been significantly simplified to improve accessibility for citizens & investors. This includes streamlined visa services for over 150 countries.

Water management is being modernized through institutional and basin-level reforms to ensure sustainable use with resource-saving technologies

Public–Private Partnership (PPP) is being increasingly utilized to mobilize investment for strategic infrastructure and development projects.

The implementation of tax reforms has established a transparent and equitable fiscal burden.

Customs Electronic System is being upgraded to streamline trade, boost transparency, and align with international standards

Favorable conditions for Sustainable Agriculture Investments

Strong economic performance, with growth rate averaging above **7.4%** in the last decade

The government set a target to **double or triple** domestic income by 2030

Enormous **growing potential** due to young and growing population

Stable inflation rates over the last five years **(24%)**

Investors are legally guaranteed the **right to transfer their income**, earned from investment & production, out of the country in foreign currency.

S&P Global Ratings has upgraded the Tajikistan's long-term sovereign **credit rating from "B-" to "B"** and affirmed its "stable" outlook

Tajikistan offers a uniquely favourable environment for sustainable agri-investment

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Agricultural Advantages

Natural, high-quality soil supports diverse crop production

Optimal conditions for year-round farming activities

Favorable climate allows up to three harvests per year

Abundant natural irrigation sources — 6th globally in freshwater reserves

Deep-rooted traditional farming knowledge and expertise

Trade & Economic Incentives

Zero export duties & Moderate Import Tariffs: Imported goods are subject to tariffs ranging from 5% to 23%

Vast and cost-effective rural labor force (74% of the population)

Access to Guaranteed Markets: (Tajikistan – 10 mln., CIS countries – 290 mln., Central Asia countries– 60 mln. Afghanistan more than 40 mln. consumers)

Business-Friendly Tax System

Tax Incentives for Sustainable Agriculture (Reforms 2022)

Tax Code Simplified: number of tax types was reduced from **10 to 7.**

VAT and Non-Resident Taxes Lowered: VAT was decreased from **18% to 14%**, and the tax on non-residents was cut from **25% to 20%.**

Unified Agricultural Tax (UAT) paid by all agricultural producers

Reduced Sales Tax: **5%** tax on sale and processing of agricultural products.

VAT Exemption: Import and supply of goods & services exempt from VAT

Tax Breaks for New Businesses: New businesses producing goods are exempt from corporate income tax for a period **2-5 years**

Increased Deductions for Capital Investments: **10%** for new technological equipment, modernization, retrofitting (modernization), technical or technological re-equipment and **5%** for production expansion through new construction or reconstruction.

Tajikistan Investments

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HIH Framework for Investments In Sustainable Agriculture

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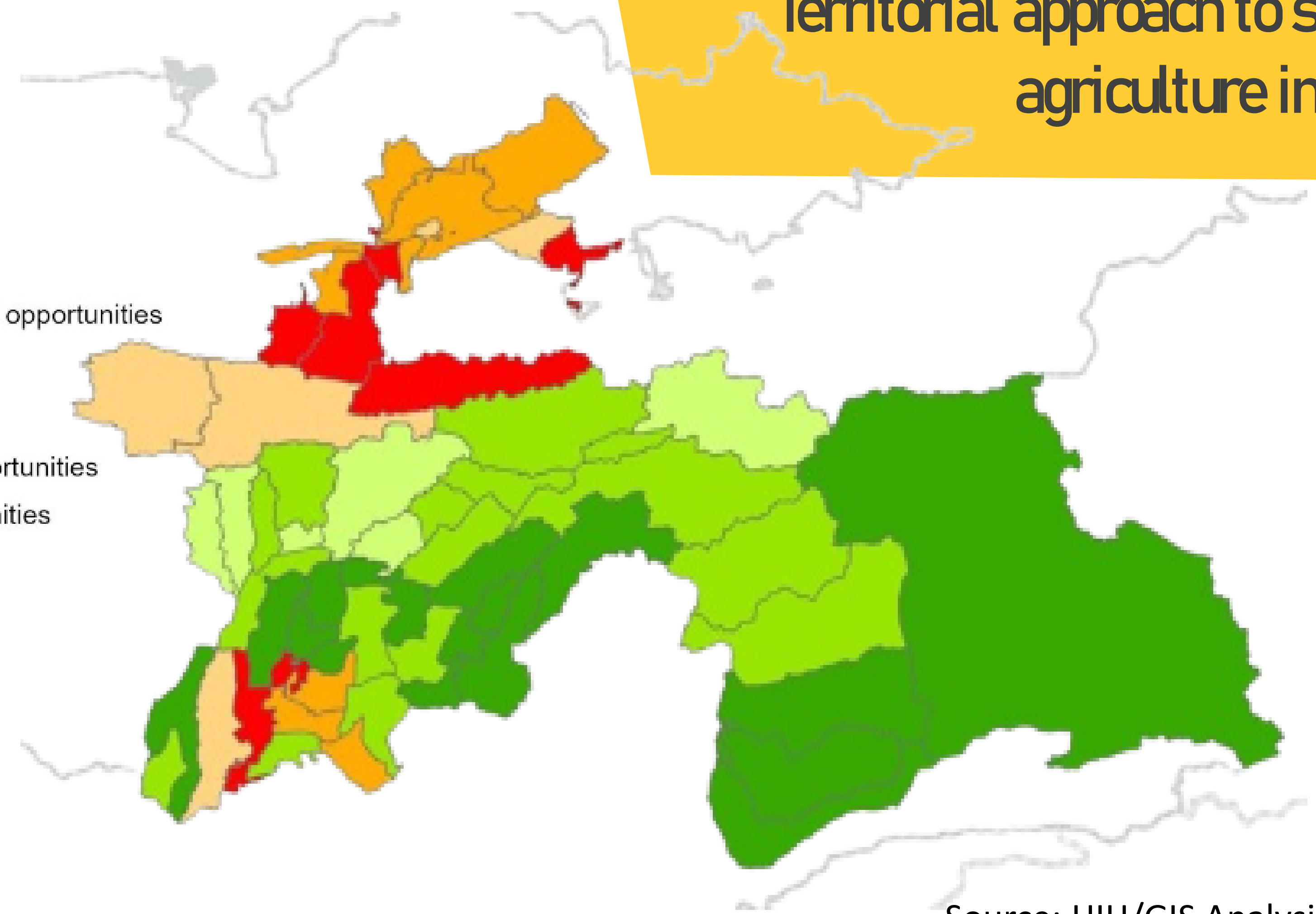
Territorial approach to sustainable agriculture investments

Legend

Classes(kmeans)

- Critical with moderate opportunities
- Medium priority with moderate agricultural opportunities
- Low priority
- High priority
- Medium priority with high agricultural opportunities
- Low priority with high agricultural opportunities
- High performance



Source: HIH/GIS Analysis team, 2023

Tajikistan: Apricot

70,000 hectares of orchards nationwide

366,000 tons produced in the 2025 season (tripled over past 5 years)

120 + apricot varieties, 90 of which in Sughd

Fresh apricot exports of around 7,000 tons in 2025 (2.5 times increase over 5 years)

High market demand: Dried apricot exports rose by 50%, totaling 31,000 tons (2025)

Strong demand, well established regional markets, e.g. Russia

Sectoral Program Synergy

Increased Farmer Incomes & Empowerment of Smallholders

Boosted Quality Standards

Adoption of Sustainable Practices & Biodiversity Preservation

Consolidation and Expansion of Apricot Production

Source: Agency on Statistics

Tajikistan: Apricot

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Technical and Capacity Constraints
Low productivity and product quality for dried apricots due to outdated technologies and poor agricultural training of farmers. Home-based drying dominate. Labor shortages
Infrastructure and Market Access Gaps
Limited storage, sorting and processing capacity, leading to crop losses. Dried apricots lower margin. Informal exports distort data. Global market decline. Market dependence on Russia. Logistics complexity
Environmental and Institutional Challenges
Weak integration into global supply chains and limited access to markets. Lack of systemic support for manufacturers

Establishment of in-vitro laboratory for apricot seedling production, related equipment and seedlings acclimatization area, cold storage, water well and reservoir and other infrastructure facilities, seedling nursery and innovative plot for variety hybridization (240K seedlings annual capacity) – USD 1.259 million

Establishment of innovative plant for apricot processing and related equipment (drying, canning, blast freezing etc.) (30Mt annual production capacity) – USD 0.315 million

Other costs (permits, office equipment and furniture, training facilities etc.) – USD 0.082 million

Operation, marketing, training for farmers, engagement with local institutions, experts – USD 0.344

R: Setup risks, technical failures and operational inefficiencies
M: Establish and enforce strict quality control, technician training, regular maintenance audits
R: Environmental/market volatility – weather, disease, and price.
M: establish and enforce strict biosecurity measures, diversify varieties, services
R: Slow rate of adoption of new invitro seedlings by farmers / Seedling production surplus
M: Establish tailored marketing and farmer training on advantages of new seedlings, demonstrate increased yield and product quality / Development of regional markets as a backup for production surplus
R: Low ability of smallholder farmers to pay for training and services
M: Differentiated pricing. Partnering with local government, international development agencies, wholesalers, processors and exporters for cost sharing.

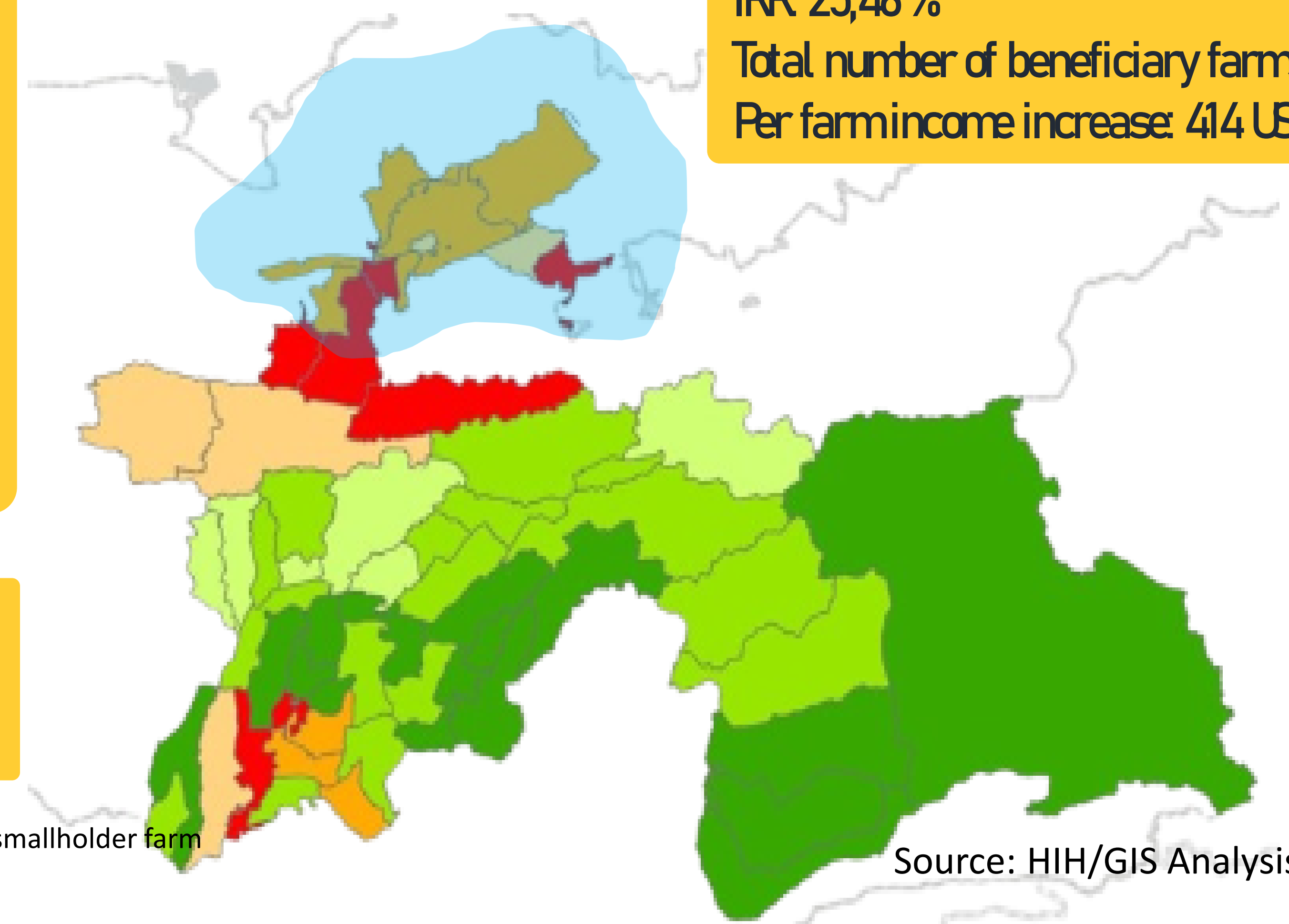
Tajikistan: Apricot

Allocation of investment:
To establish a center introducing modern agricultural technologies and varieties, and to develop facilities for Apricot cluster growth.

Expected Results:
Modernization of the apricot sector through improved farming practices, infrastructure, and market access

- >1000 direct farms benefited
- >3500 indirect farms benefited
- >31000 total number of people benefited

Total Investment: 2.0 Million USD
NPV: 1.864 M USD
IRR: 25,46 %
Total number of beneficiary farms: 4,500
Per farm income increase: 414 USD



*Assuming 6.8 people per household / smallholder farm

Source: HIH/GIS Analysis team, 2023

Establish a Seed Potato Production & Multiplication Center

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1,333 thousand tons produced 2025 (+5.5 % vs 2024)

37 042 tons of seed potatoes (category 1 and 2) produced by farms in 2025

The annual demand for certified potato seeds is 162,000 tons, with more than 8,000 Elite category seeds.
550 tons of Elite seed imported in 2025

120 kg cap consumption – highest in Central Asia

HH target: 100% import substitution by 2031 (national KPI)

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Establish a sustainable Seed Potato Production & Multiplication Center for the national market

Produce nucleus & pre-basic seed (Tier A)

Multiply & certify quality seed (Tier B)

Provide market linkage, training & reduce imports long term substitution

Tajikistan: Seed Potato

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Low availability of elite (certified, disease free) potato seed varieties

Lack of cold storage of improved varieties for multiannual use

High level of loss of genetic potential drop 20 to 40%

Currently high level of imports of table potatoes

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Establish an invitro potato laboratory (400 m2), green houses (3000 m2), packing, Hybrid solar powered unit for tissue culture, Land (515 ha) provided by gov't, annual production of Elite category seeds 7000 Mt - USD 6.96 Million (co-financing USD 0.5 Million)

Seed production and mechanization (fertilizer, equipment, bio security fencing) - USD 2.68 Million

Operational budget (5 years), Including capacity development for specialized expertise, with engagement of local universities, link with international institutions and companies, experts - USD 4.80 Million

Marketing, promotion, and campaigns - USD 0.25 Million

Farmer training on use and cultivation of elite potato seeds - USD 0.75 Million

Monitoring, Audit and Contingency / Reserve - USD 0.62 Million

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R: Setup risks, technical failures and operational inefficiencies, lack of stable energy supplies
M: Establish and enforce strict quality control, technician training, regular maintenance audits, solar energy

R: Environmental/market volatility – weather, disease, and price.

M: Establish and enforce strict biosecurity measures

R: Slow rate of adoption of elite potato seed use by farmers

M: Establish tailored marketing and farmer training on use of elite potato seeds e.g., work with elite farmers to setup pilots, aggregators linkages, demonstrate improved returns.

R: Low availability of qualified labor such as lab experts, biotechnologists.
M: engage with local universities, link with international institutions and companies, experts

Tajikistan: Seed Potato

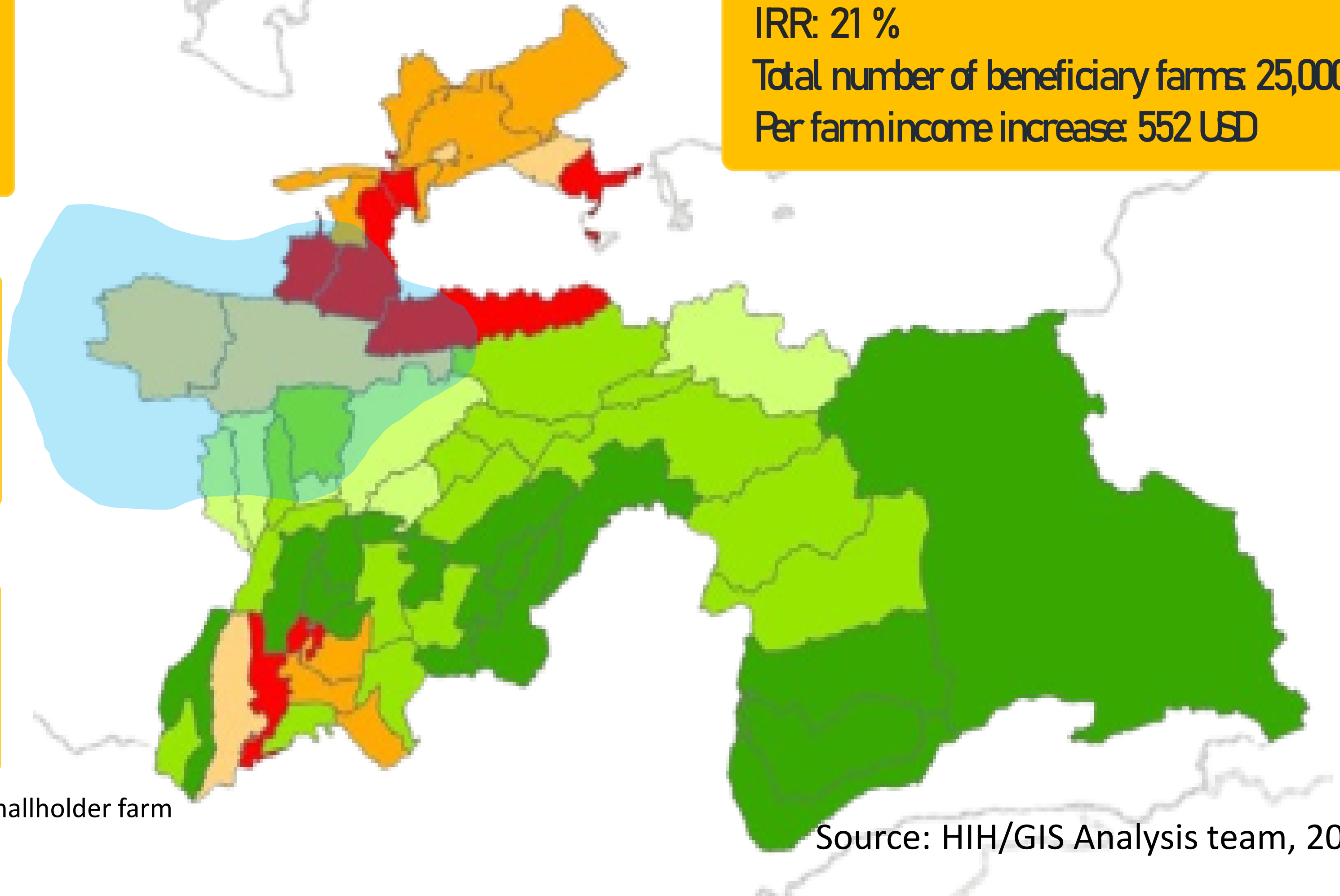
Government:
Creates enabling environment (policy, land, certification, procurement).

Bring capital and risk sharing, commercial discipline, and market linkages
De-risk investment, fund CAPEX, provide technical guidance, monitor impact

>10,000 direct farms benefited
>15,000 indirect farms benefited
>170,000* total number of people benefited

*Assuming 6.8 people per household / smallholder farm

Total Investment: 16.06 Million USD
NPV: 13.8M USD
IRR: 21 %
Total number of beneficiary farms: 25,000
Per farm income increase: 552 USD



Source: HIH/GIS Analysis team, 2023

Pasture Development

Vast Area: Pastures cover 3.8 million hectares, making up 83% of the country's agricultural land.

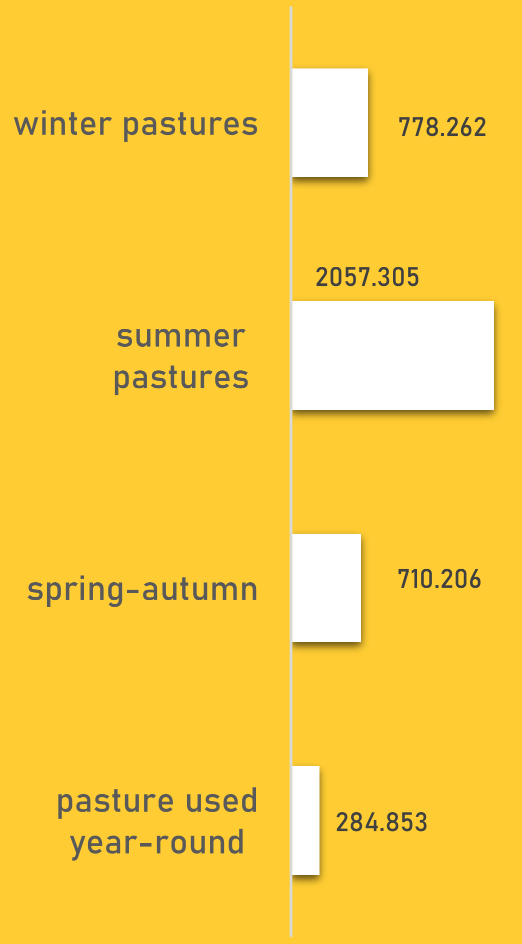
Pastures provide 60-70% of the annual feed for cattle, yaks, sheep, goats, and horses.

Low Productivity: Grass yields are critically low, especially in the spring, autumn, and winter, producing only 150 - 200 kg per hectare.

Feed Shortage: The lack of adequate winter feed results in a 10-25% loss in the live weight of small livestock, which has a significant economic impact.

Degraded Ecosystems: An estimated 80% of all pastures are in an advanced state of degradation.

Systemic Issues: The sector is hampered by poor infrastructure, low technology adoption, and limited irrigation.



Area under Pasture Annually (ha)

Tajikistan: Pasture

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Excessive pressure on pasture resource base, leading to degradation. Few alternative feed resources	Support maintenance of pasture access roads, on-pasture infrastructures (water access, shelters, fences) (22,176 ha) - USD 5.68 million	R: Lack of regular maintenance of pasture access roads, infrastructures. M: Provide support for maintenance in collaboration with local PUUs
Lack of mechanisation and service support	Provide mechanization equipment for Pasture User Unions (PUUs), building on the Livestock and Pasture Development Project (LPDP) model, training for mechanization users including maintenance and repair – 2.81 USD million	R: Lack of knowledge in use and application of new equipment and machinery M: Provide training on proper equipment use and maintenance
Low availability of high yield fodder crops	Provision of improved fodder crops (Seeds e.g.: Alfalfa, Annual grasses) (7744 ha) – USD 1.21 million	R: Lack of access to new varieties M: Dissemination of climate-resilient fodder varieties, support for fodder conservation
	Introduction of pasture Improvement technologies (Superficial improvement, radical improvement, controlled grazing) (7,322 ha) – USD 0.3 million	R: Lack of knowledge in pasture management M: Pasture Management Plans,

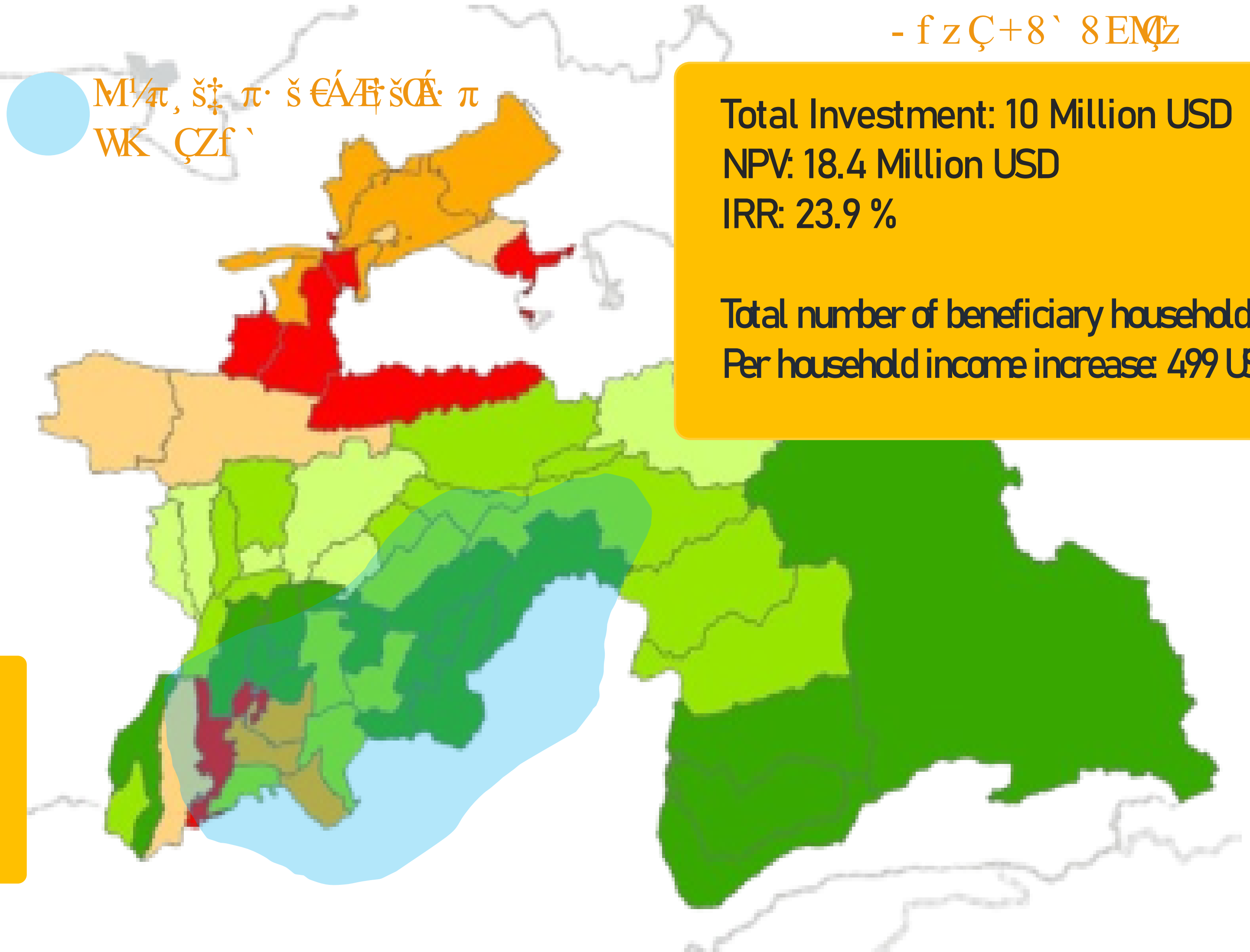
Tajikistan: Pasture

Allocation of investment:
Improve pasture quality and access, infrastructure, and mechanization

Expected Results:
Improved pasture management and decreased land degradation

36,860 households benefited

35,200 ha pastureland improved



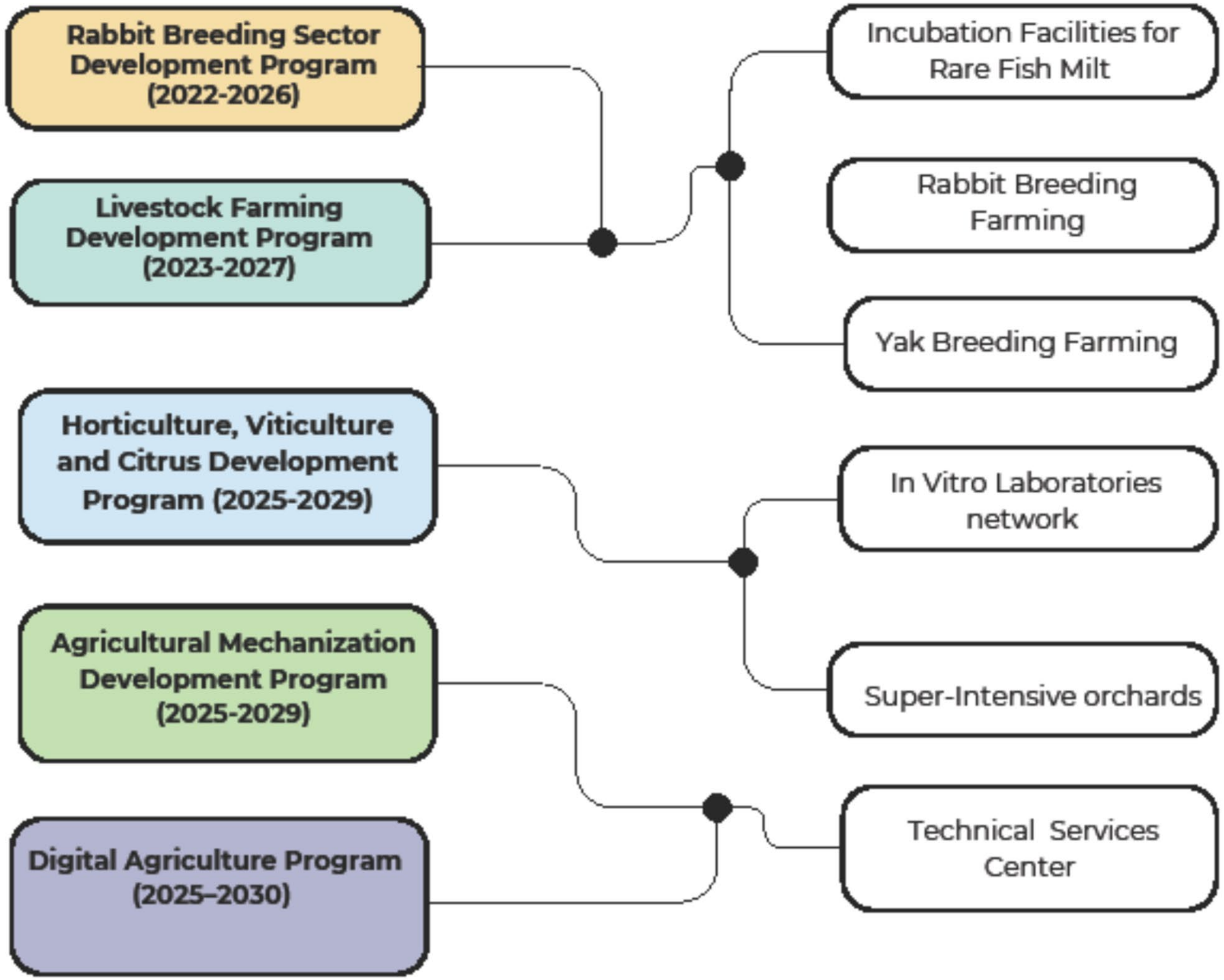
Total Investment: 10 Million USD
NPV: 18.4 Million USD
IRR: 23.9 %

Total number of beneficiary households: 36,860
Per household income increase: 499 USD

Source: HIH/GIS Analysis team, 2023

Additional Projects under design

Total Investment Cost – 98 MUSD



Tajikistan: Summary of Investment plan

28.06 M US$	23.45%	42.26 M USD	452,000 People	488 US$	In progress
Investment cost	AVG IRR	Total NPV	Total Beneficiaries	Av. per household income increase	tCO2-e sequestrated

Apricot Center

Investment:
USD 2.0 Million

NPV:
USD 1.864 Million

IRR:
25.46%

Direct beneficiaries
1,000 farms

Indirect beneficiaries:
3,500 farms

Total beneficiaries:
4,500 farm / 31,000 People*

Per Household income increase
US$ 414 per farm

Total Carbon Emissions
0 ktCO_2-e (in progress)

1

Potato Seed

Investment:
USD 16.06 Million

NPV:
USD 13.8 Million

IRR:
21%

Direct beneficiaries
10,000 farms

Indirect beneficiaries:
15,000 farms

Total beneficiaries:
25,000 farm / 170,000 People*

Per Household income increase
US$ 552 per farm

Total Carbon Emissions
0 ktCO_2-e (in progress)

2

Pasture

Investment:
USD 10.0 Million

NPV:
USD 18.4 Million

IRR:
23.9 %

Direct beneficiaries
36,860 households

Total beneficiaries:
251,000 people*

Per Household income increase
US$ 499 per household

Total Carbon Emissions
ktCO_2-e (in progress)

3

Summary