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FOREIGN TRADE RELATIONS OF CENTRAL ASIAN COUNTRIES AND THE USA: DYNAMICS, BARRIERS, PROSPECTS

The article provides a comprehensive analysis of trade and economic interaction between the United States of America and the countries of Central Asia in the context of growing protectionism and changes in US tariff policy. The purpose of the study is to determine the current state, key barriers and prospects for the development of bilateral trade in the "5 + 1" cooperation format. The study examines the dynamics of export-import flows between the United States and each of the countries in the region (Kazakhstan, Kyrgyzstan, Uzbekistan, Tajikistan, Turkmenistan) for the period 2003-2023, analyzes the trade structure and identifies the most sensitive industries to foreign trade restrictions.

The article uses descriptive, comparative and correlation analysis methods, a retrospective approach, as well as data visualization based on international and national statistical sources. Particular attention is paid to the impact of new tariff barriers introduced by the United States in 2025 on the export capabilities of the countries in the region. The study identified vulnerable sectors of the economy, in particular metallurgy, agriculture, textiles, oil and gas. In addition, three scenarios (optimistic, realistic and pessimistic) for the development of cooperation were considered. They take into account how much different countries are institutionally prepared for external economic shocks.

The conclusions of the study can be used to develop more sustainable foreign economic policies in the context of instability in global trade.

Key words: economic integration, «5+1» cooperation format, Central Asia, Central Asian region, USA, partnership areas, trade wars.

Кілт сөздер: экономикалық интеграция, 5+1 ынтымақтастық форматы, Орталық Азия, Орталық Азия аймағы, АҚШ, серіктестік аймақтары, сауда соғыстары.

Ключевые слова: экономическая интеграция, формат сотрудничества «5+1», Центральная Азия, Центрально-азиатский регион, США, направления партнёрства, торговые войны.

JEL: F02, F15

Introduction. In the context of increasing global competition and transformation of foreign economic priorities, Central Asia retains the status of a strategically important region for the United States. Despite the intensification of political dialogue within the "5+1" format (or in some sources "C5+1"), trade and economic cooperation between the United States and Central Asian countries remains limited in volume and unbalanced in structure. This is due to a number of factors, including low export diversification, logistical isolation, weak development of the manufacturing sector, and institutional barriers.

The escalation of trade tensions initiated by the United States through the introduction of new tariff barriers is having an increasingly noticeable impact on the dynamics of world trade. These changes are particularly sensitive for developing economies, including the countries of Central Asia, which interact with the United States within the framework of the "5+1" format. Initially, this format was aimed at developing political dialogue, economic partnership and strengthening regional resilience, but recent protectionist policies of the United States – in particular, increasing tariffs and tightening market access conditions – raise concerns about their impact on national economies in the region.

The economies of Central Asian countries are to varying degrees oriented toward the export of raw materials, heavy industry products, and agriculture, while for a number of countries the American market remains one of the key foreign trade directions. Increasing trade barriers could lead to increased costs, limited competitiveness, and a redistribution of export flows. Given the differences in the structure of economies and the level of dependence on the United States, it is important to assess not only the direct

economic consequences, but also the potential risks to sustainable development and the foreign economic strategy of the countries in the region.

The aim of the study is to analyze the trade interaction between the United States and the Central Asian countries, with a focus on identifying its current state, dynamics, key barriers, and development prospects.

To achieve the stated aim, the study pursues the following objectives:

- to examine the dynamics of export and import flows between the United States and the Central Asian countries over the period 2003–2023;
- to analyze the structure of trade by country and by product categories;
- to identify key barriers hindering the development of bilateral trade;
- to determine which sectors of the Central Asian economies are most dependent on trade with the United States and therefore most exposed to potential tariff-related disruptions;
- to explore potential scenarios for the evolution of trade cooperation between the United States and Central Asian countries in the aftermath of the 2025 tariff policy changes.

The study is based on the analysis of data from international and national statistical databases, including World Bank Open Data, World Data Atlas, The Observatory of Economic Complexity, as well as official data from statistical committees of the Central Asian countries. The analysis covers the period from 2003 to 2023, which enabled the identification of long-term trends in trade and economic interaction between the United States and the countries of the region.

The objects of the study include five Central Asian countries—Kazakhstan, Kyrgyzstan, Uzbekistan, Tajikistan, and Turkmenistan—as well as the United States of America.

The methodological framework included descriptive and comparative analysis of export and import flows, the structure of trade by country and product groups, as well as a retrospective approach to assess changes in external economic relations. The use of data visualization tools (charts and graphs) made it possible to clearly illustrate the evolution of foreign trade.

To explore the relationship between the economies of the Central Asian countries and the United States, a correlation analysis was conducted using GDP as the key variable, given its status as one of the most fundamental indicators of economic development. Relevant data for the period 1990–2023 for each country were obtained from open-access sources, including the World Bank and World Data Atlas. In the data collection process, the following principles were adhered to: openness, accessibility, and transparency of statistical materials, as well as the comparability of data and results over time, which ensures the validity and consistency of cross-country comparisons.

Statistical data were processed using the Microsoft Excel Data Analysis Package, which enabled the systematization of foreign trade indicators, the construction of time series, the execution of basic calculations, and the performance of correlation analysis.

This comprehensive approach enabled an in-depth assessment of the current state of trade relations and helped identify potential directions for regional adaptation to the emerging challenges of the global economy.

One of the limitations of this study is the absence of complete statistical data for the year 2024, which is due to the timing of official data releases. Another methodological constraint lies in the limited availability of detailed information on U.S. tariff measures specifically applicable to goods originating from Central Asian countries. As there are few unified and publicly accessible sources providing comprehensive breakdowns of tariff rates for the region, the analysis relied on generalized data and scenario-based assumptions derived from the study of U.S. global trade policy and typical measures applied to developing economies.

Literature review. Contemporary studies on the economic interaction between the United States and the Central Asian countries highlight the significant influence of geopolitical factors on the region's trade dynamics.

In particular, Arbashiyeveva A.D. [1] emphasizes the need for regional integration among the Central Asian states, underscoring the importance of jointly addressing global challenges and strengthening economic self-sufficiency through cooperation. While her work identifies key region-specific barriers, it pays little attention to the dimension of interaction with external powers, including the United States—leaving this vector insufficiently explored.

The study by Ospanova A.N., Nursultanova L.N., Abdullin R.B., Shenin A.S., Akhmet A.S. [2] contrasts two megaprojects: China's OBOR (One Belt One Road) and the U.S.-backed "New Silk Road." The authors conclude that U.S. influence in the region has declined, noting that American initiatives have

failed to compete with OBOR. While the research covers broader geoeconomic strategies, it offers only limited focus on trade interaction and barriers, and lacks concrete statistical data on trade flows. The article by Dzhorobekova A.E., Troitskiy E.F. and Yun S.M. [4] focuses on the strategic interests of external actors in the region, viewing the United States as a player primarily seeking to contain Russian and Chinese influence, but failing to offer a substantive integrative alternative.

Davydov A. [3], in turn, points to the growing strategic interest of the United States in the region after 2015, which is reflected in the strengthening of the C5+1 platform. However, he acknowledges the limited scope of concrete economic—particularly trade-related—initiatives. A perspective on the foreign policy orientation of the Central Asian countries is further developed by Pritchins S.A. [5, 6], who demonstrates that multi-vector diplomacy has become the dominant model, within which the United States competes with China, Russia, and the European Union but does not occupy a priority position.

The study by Onyusheva I.V., Htay S.N., T.T. Sin. [7] offers a macroeconomic assessment of the U.S.–China trade conflict and its impact on global markets, including Central Asia. It highlights the influence of U.S. protectionist policy—particularly tariffs—on the global trade system, but addresses the effects on Central Asia only in general terms.

Another stream of research focuses on assessing the investment attractiveness of the region. The works of Azretbergenova G.Zh., Syzdykova A.O., Kenzhegalieva A., Esenalı A. [8], as well as Adambekova A.A., Appazov A., Adambekov N.T. and Amankeldi N.A. [9], examine macroeconomic, legal, and infrastructural factors shaping FDI inflows to Central Asia, including the role of donor countries. Although the United States is mentioned, it is not considered a key trade and investment partner—unlike China, the EU, and Russia.

Ashurov S., Abdullah Othman A.H., Rosman R. Bin, Haron R. Bin [10], in their quantitative analysis, also conclude that the United States is primarily perceived as a political and strategic actor rather than a stable source of economic cooperation.

A common feature of the reviewed studies is the recognition of Central Asia's growing importance in international economic and political relations, particularly in the context of competition among external powers. However, the specifics of trade barriers, the dynamics of export and import flows between the United States and the countries of the region, as well as scenario-based assessments of future cooperation, remain only partially addressed. The present study aims to fill these gaps by focusing on a quantitative and critical assessment of the implications of new U.S. trade barriers for Central Asian exports. It incorporates scenario analysis and identifies the most vulnerable sectors of the regional economies.

Main part. Mutual trade between the United States and Central Asian countries is an important aspect of economic interaction with potential for further development. The quantitative and qualitative analysis of trade flows covers the period from 2003 to 2023 and includes.

Figures 1–5 present the dynamics of changes in exports, imports, and total trade turnover between Kazakhstan, Kyrgyzstan, Turkmenistan, Tajikistan, Uzbekistan, and the United States.

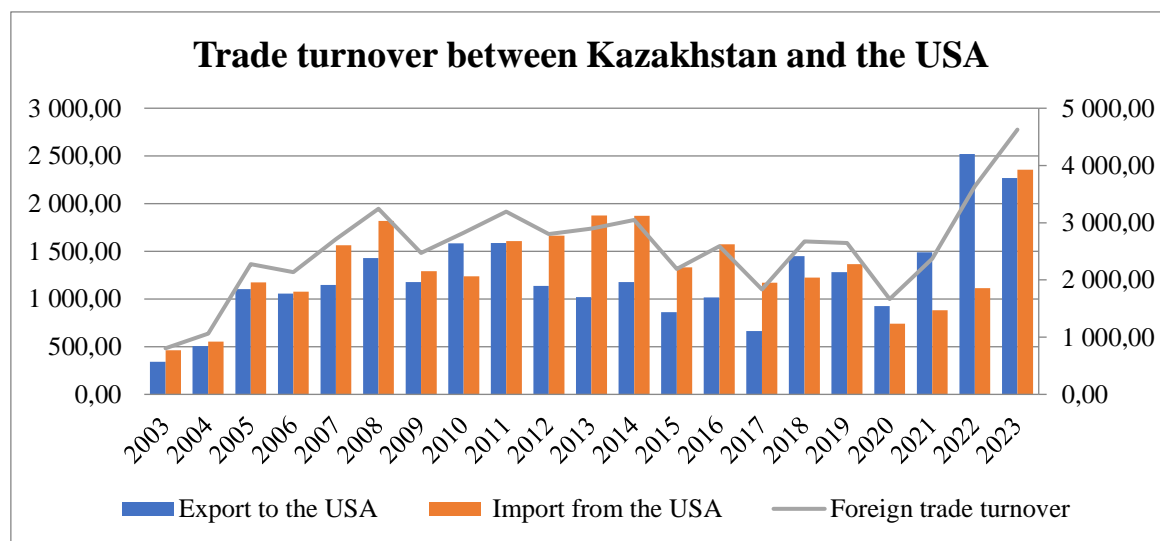


Figure – 1. Dynamics of changes in export, import and foreign trade turnover between Kazakhstan and the USA, 2003–2023, million US dollars*

*compiled by the authors based on sources [11–13]

Over the past two decades, the foreign trade turnover between Kazakhstan and the United States has increased significantly—from USD 805 million in 2003 to USD 4.6 billion in 2023. Kazakhstan's exports have grown nearly sevenfold, reaching a peak of USD 2.5 billion in 2022, largely due to the supply of raw materials. Imports from the United States have also shown steady growth, reflecting Kazakhstan's demand for American equipment, technologies, and pharmaceuticals.

After a decline in 2015–2017, trade volumes began to recover, especially noticeably since 2020. The peak of trade activity occurred in 2023, when trade turnover reached its maximum in two decades. In general, cooperation is characterized by positive dynamics with prospects for further growth.

The structure of trade between Kazakhstan and the United States is highly asymmetrical. Kazakhstan mainly exports raw materials to the United States: uranium, metals (including rare earth metals), oil, and chemical products. At the same time, it imports mainly technologically complex products: industrial equipment, vehicles, electronics, as well as pharmaceuticals and agricultural machinery. This structure indicates Kazakhstan's dependence on raw materials exports and the need for high-tech imports.

The main obstacles to the development of bilateral trade include: (1) limited direct trade routes and weak logistical connectivity between Kazakhstan and the United States, (2) the absence of a broad network of bilateral agreements that facilitate access to markets, (3) the dependence of Kazakhstan's exports on world prices for raw materials, which makes trade unstable, and (4) the low degree of diversification of Kazakhstan's export products. Additional barriers include bureaucratic procedures, insufficient transparency of the investment climate, and the weak representation of small and medium-sized businesses in international trade.

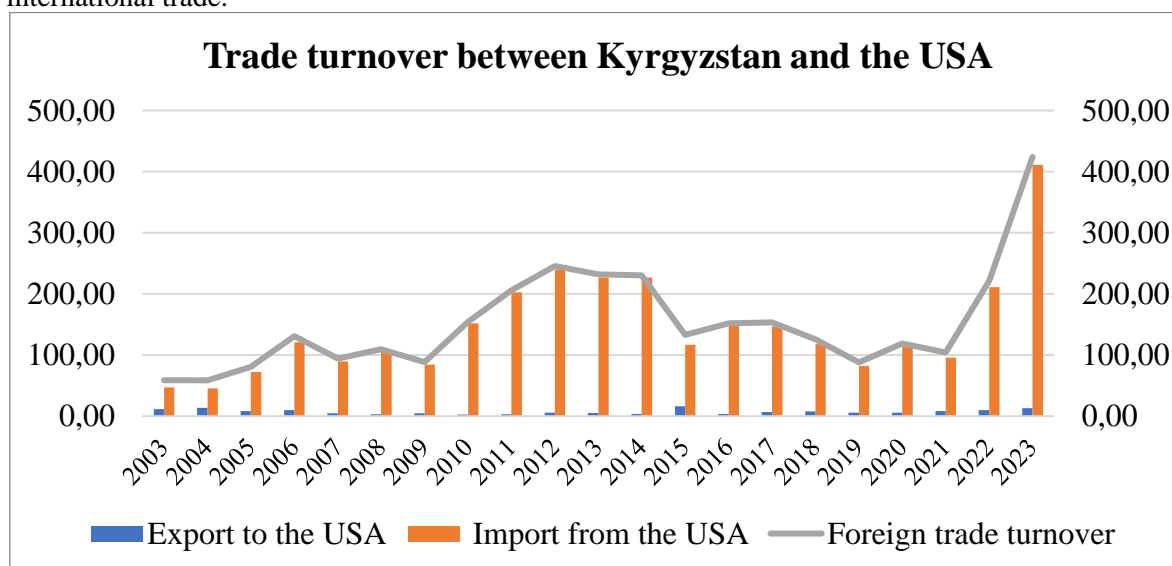


Figure – 2. Dynamics of changes in export, import and foreign trade turnover between Kyrgyzstan and the USA, 2003–2023, million US dollars*

**compiled by the authors based on sources [11–13]*

Between 2003 and 2023, the foreign trade turnover between Kyrgyzstan and the United States increased from USD 58.8 million to USD 424.1 million—more than a sevenfold growth. This increase was primarily driven by rising imports from the United States, which reached USD 410.97 million in 2023 (97% of the total turnover). Kyrgyzstan's exports to the U.S. have remained low and unstable, not exceeding USD 16 million throughout the entire period. This indicates a pronounced trade imbalance and limited export capacity. Overall, the trade dynamics reflect growing economic engagement; however, further development requires export diversification and strengthening of Kyrgyzstan's production potential.

The trade structure between Kyrgyzstan and the United States is marked by a pronounced imbalance, with imports from the U.S. significantly exceeding exports. Kyrgyzstan primarily exports to the U.S. textile products, light industry goods, agricultural raw materials, and consumer goods. In contrast, its imports consist mainly of high-tech products, including medical and industrial equipment, automobiles, and goods for digital and telecommunications infrastructure. This structure reflects a low level of production diversification and a limited export potential on the part of Kyrgyzstan.

Key obstacles to the development of bilateral trade include: (1) a narrow and underdeveloped export base in Kyrgyzstan, which limits the country's ability to access the U.S. market; (2) transportation and

logistical challenges due to the lack of direct supply routes; (3) a limited level of standardization and certification of products in accordance with international requirements, particularly for exports to the United States. Additional barriers include low awareness among small and medium-sized enterprises (SMEs) about foreign trade opportunities and the weak investment attractiveness of export-oriented sectors.

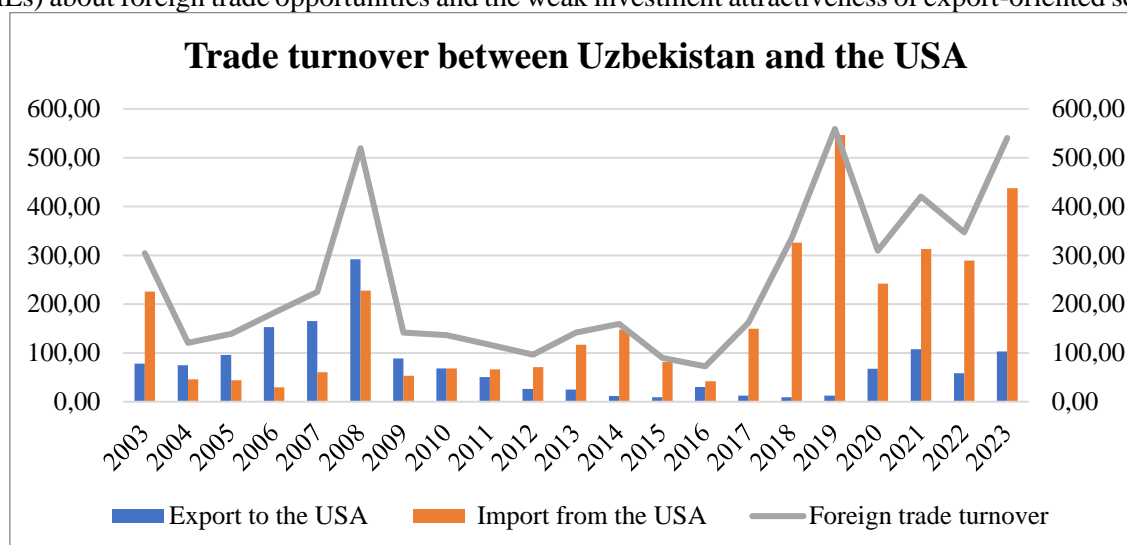


Figure – 3. Dynamics of changes in export, import and foreign trade turnover between Uzbekistan and the USA, 2003–2023, million US dollars*

*compiled by the authors based on sources [11–13]

Trade between Uzbekistan and the United States over the past two decades has been unstable, but has shown clear growth since 2017. Foreign trade turnover increased from USD 304 million in 2003 to USD 540 million in 2023, with imports from the United States accounting for the majority of this figure. Uzbekistan's exports to the U.S. remain limited, fluctuating between USD 9 million and USD 108 million, and are primarily composed of textiles, food products, and chemical goods. In contrast, imports from the U.S. have shown consistent growth and include machinery, equipment, medical devices, and vehicles—reflecting the country's policy of industrialization and economic modernization.

The main obstacles to the growth of bilateral trade include: (1) the limited nature of Uzbekistan's export base and its dependence on low value-added goods; (2) logistical remoteness and the absence of direct supply routes; (3) the non-compliance of certain products—particularly in the agri-food sector—with U.S. standards and regulatory requirements. Additional constraining factors include a lack of transparency in the regulatory environment, limited access of small businesses to foreign markets, and the absence of specialized trade facilitation mechanisms.

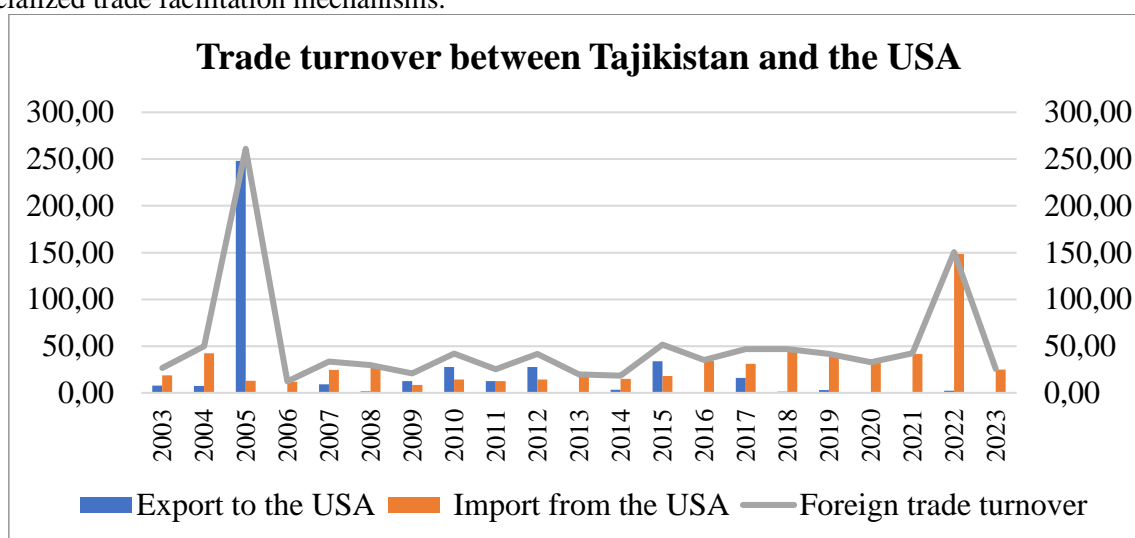


Figure – 4. Dynamics of changes in export, import and foreign trade turnover between Tajikistan and the USA, 2003–2023, million US dollars*

*compiled by the authors based on sources [11–13]

The foreign trade turnover between Tajikistan and the United States has remained low and volatile over the past two decades, with sharp fluctuations in certain years. In 2005, there was an anomalous surge in exports, reaching USD 248 million; however, trade volumes declined significantly in subsequent years. By 2023, total turnover amounted to only USD 25.72 million, a level comparable to that of the early 2000s.

The trade structure between Tajikistan and the United States is characterized by low volume and instability. Tajikistan's exports are extremely limited and consist primarily of aluminum, cotton, and textile products, with occasional spikes such as the one observed in 2005. Imports from the United States are more diversified, including industrial equipment, transportation goods, agricultural technologies, and medical devices; however, they also lack a consistent upward trend.

Key barriers to trade development include: (1) a limited export range with low value-added products; (2) insufficient certification and standardization of goods in accordance with international norms; (3) Tajikistan's geographical and logistical isolation from major trade routes and seaports. Additional constraints include infrastructural limitations, weak state support for exporters, and limited access to foreign markets for small and medium-sized enterprises.

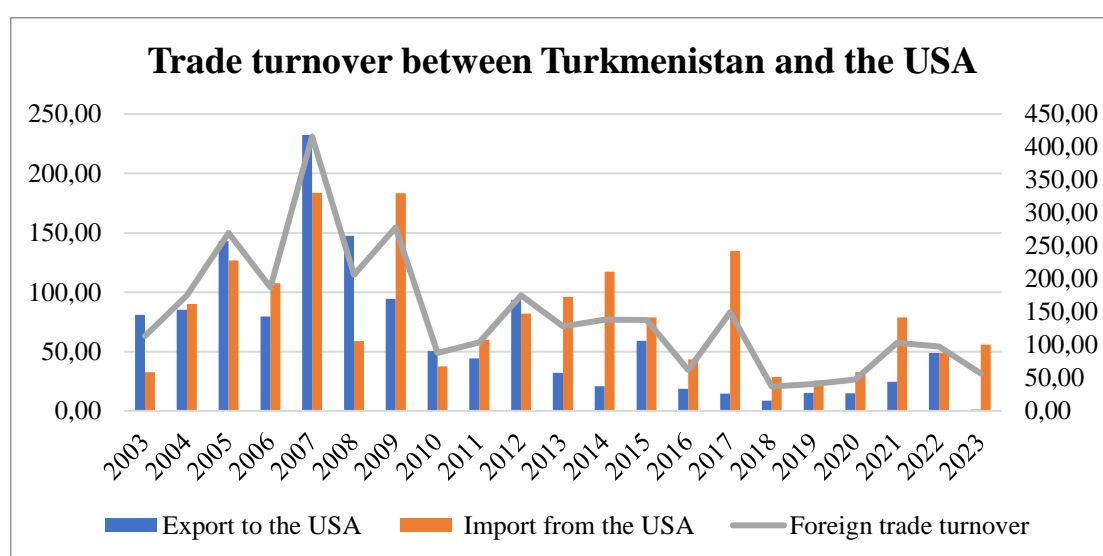


Figure – 5. Dynamics of changes in export, import and foreign trade turnover between Turkmenistan and the USA, 2003–2023, million US dollars*

*compiled by the authors based on sources [11–13]

The foreign trade turnover between Turkmenistan and the United States has shown a declining trend over the past two decades, following a peak of USD 415.87 million in 2007. By 2023, total trade turnover had decreased to USD 56.92 million—seven times lower than the peak level. This decline reflects a reduction in external economic engagement and Turkmenistan's inward-oriented economic policy.

Turkmenistan's exports to the United States have primarily consisted of energy resources, cotton, and textile products, although their share has declined significantly since the 2010s. At the same time, imports from the United States include machinery, equipment, industrial components, and infrastructure-related goods; however, they have also failed to demonstrate sustained growth.

Key barriers to the development of bilateral trade include: (1) the closed nature of Turkmenistan's economic system, which limits external competition and access to the domestic market; (2) strict currency and administrative controls, creating difficulties for payments and contractual arrangements; (3) the absence of international certification and non-compliance of export goods with U.S. market requirements. Additional obstacles include a lack of logistical solutions and foreign trade infrastructure, as well as a low level of digitalization and transparency in customs procedures.

In addition, a correlation analysis was conducted and presented in the form of a matrix of pairwise correlation coefficients (R) (Table 1). This analysis made it possible to determine the degree of interrelation between the GDP dynamics of the United States and the Central Asian countries. The Chaddock Scale (strength of relationship scale) was used to interpret the correlation coefficients. Coefficient values close to 1 indicate a strong positive correlation between the economies, meaning that their changes over time follow similar trends.

Table – 1

Matrix of pairwise correlation coefficients R

		USA	Kazakhstan	Kyrgyzstan	Tajikistan	Turkmenistan	Uzbekistan
		y	x ₁	x ₂	x ₃	x ₄	x ₅
USA	y		0,9006	0,9434	0,9231	0,9565	0,8948
Kazakhstan	x ₁	0,9006		0,9317	0,9765	0,9564	0,9422
Kyrgyzstan	x ₂	0,9434	0,9317		0,9764	0,9819	0,9352
Tajikistan	x ₃	0,9231	0,9765	0,9764		0,9865	0,9685
Turkmenistan	x ₄	0,9565	0,9564	0,9819	0,9865		0,9649
Uzbekistan	x ₅	0,8948	0,9422	0,9352	0,9685	0,9649	

* calculations are based on the source [14]

The highest GDP correlations are observed between the United States and Turkmenistan (0.9565), as well as Kyrgyzstan (0.9434), which may indicate an indirect influence of global economic trends on the macroeconomic indicators of these countries. Indirect influence refers to the impact of shared external factors—such as commodity price fluctuations, global inflation, or worldwide crises, even in the absence of direct economic ties. Kazakhstan and Uzbekistan show a strong correlation with the USA GDP (0.9006 and 0.8948). Within the region, the relationship is even higher (more than 0.95). This indicates the similarity of economic processes and the high interdependence of Central Asian countries on each other.

In recent months, the entire world has been discussing the tightening of US trade policy by the Donald Trump administration by increasing import duties on a number of goods. On July 31, 2025, the White House issued an official executive order “Further modifying the reciprocal tariff rates” [15]. This order reinstates the structure of “reciprocal tariffs” initially introduced on April 2, setting a baseline rate of 10%, but imposing differentiated tariffs ranging from 10% to 41% on 69 countries and territories, including the European Union. The so-called “mirror tariffs” also affect the Central Asian states. For instance, Kazakhstan—the United States’ largest trading partner in the region—was included in the special Annex I list of the new order and is now subject to a 25% tariff rate (previously 27%), although the U.S. accounts for only 3% of Kazakhstan’s total foreign trade. For Tajikistan, a 10% tariff rate applies, while the U.S. represents just 0.1% of its trade volume. A similar situation is observed in Kyrgyzstan, where the tariff also stands at 10%, and the U.S. share in total trade is 3.9% [15].

Although the United States is not among the main trading partners of the Central Asian countries, changes in U.S. trade policy—including the introduction of new tariffs—may still affect specific sectors of their economies (Table 2).

Table – 2

Central Asian economic sectors most sensitive to changes in US tariff policy

Economic sector	Causes of sensitivity
Metallurgy and mining industry	<ul style="list-style-type: none"> — The United States is an important market for the supply of titanium, uranium, ferroalloys, aluminum, and precious metals, particularly from Kazakhstan and Uzbekistan. — These goods are often subject to export controls and may be affected by tariffs or quotas, especially under conditions of geopolitical competition or sanctions pressure. — Higher tariffs reduce export profitability and may lead to a decline in demand.
Agriculture and agro-export	<ul style="list-style-type: none"> — Tajikistan and Kyrgyzstan export dried fruits, nuts, natural juices, and livestock products to the United States. — These products are limited in their presence on the American market and their positions are directly related to their price attractiveness. — The new tariffs could reduce export profitability and, as a result, lead to substitution with products from Latin America or Southeast Asia.
Textile and light industry	<ul style="list-style-type: none"> — This sector relies on preferential trade regimes, particularly for apparel and textile exports, especially from Kyrgyzstan and Uzbekistan. — If the preferences are removed or tariffs are increased, export volumes will decline because competition from Asian countries such as Bangladesh and Vietnam is very high.

	— For small businesses in this sector, any change in trading conditions poses a serious risk.
Oil and gas industry	<p>— Although the United States is not a major buyer of crude oil, American companies are involved in extraction, processing, and investment projects, particularly in Kazakhstan and Turkmenistan.</p> <p>— The introduction of tariffs on petrochemical products and equipment, or the tightening of sanctions-related controls, may restrict technological access and reduce investment activity.</p>

**compiled by the authors*

The new wave of protectionist measures introduced by the United States is unlikely to have a significant impact on the economies of Central Asian countries. According to an analytical report by the Eurasian Development Bank (EDB), the potential consequences are expected to be minimal. As noted by the Bank's experts, countries such as Kazakhstan, Kyrgyzstan, and Tajikistan will experience only limited effects [15].

Given the specifics of export-import structures, the level of dependence on external markets, and the institutional readiness to respond to external shocks, the responses of countries in the region may vary significantly.

Table 3 presents three possible development scenarios — optimistic, realistic, and pessimistic — covering key parameters of cooperation: trade volumes, the level of investment interaction, and institutional changes. These scenarios provide an analytical basis for assessing potential trajectories of the region's relations with the United States under the new external economic policy environment.

Table – 3

Scenarios for the development of economic cooperation between Central Asian countries and the United States after the introduction of tariff barriers in 2025-2026

Country	U.S. Tariff Measures (2025)	Optimistic Scenario	Realistic Scenario	Pessimistic Scenario
Kazakhstan	Increasing the duty to 25% on certain goods, including metals and petrochemical products	Kazakhstan has a diversified economy and active foreign policy ties, including with China, the EU and Turkey. In the event of increased tariffs from the US, the country could reorient exports to more stable markets and develop processing of raw materials on the domestic market.	The US is not a key trading partner for Kazakhstan, so the losses will be partial. However, technological and investment restrictions will affect metallurgy and petrochemicals.	With a sharp curtailment of American projects and sanctions pressure, deindustrialization in sensitive sectors and increased economic vulnerability are possible.
Uzbekistan	10% tariffs on textiles and food products	Thanks to its economic liberalization policy, Uzbekistan is already expanding ties with Turkey, South Korea and the UAE. These destinations could offset the decline in supplies to the United States.	The decline in export revenues will be moderate. The domestic market and neighboring countries will partially "intercept" excess volumes of textiles and food products.	The loss of access to preferences will lead to a decrease in income in rural areas and light industry, especially in export-oriented regions.
Kyrgyzstan	10% tariffs on textiles and agricultural exports	With support from international institutions and partnership with Turkey/China, Kyrgyzstan can maintain exports	Supply cuts are inevitable, but disaster can be avoided with the right tax and export support.	Due to the low diversification of the economy and dependence on small-scale production, the increase in tariffs

		through flexibility and cost advantage.		could lead to the closure of enterprises and an increase in unemployment.
Tajikistan	10% tariffs on textiles and processed products	Development of new export channels to Asian and CIS countries, as well as support for small businesses will help soften the effect.	Tajikistan's economy is vulnerable, but not critically dependent on the United States. Small manufacturing and agricultural clusters will suffer.	In the absence of compensatory measures, tariff increases could lead to mass closures of export-oriented enterprises and increased social instability.
Turkmenistan	10% tariffs, control and restrictions on the export of uranium, gas, petrochemicals	Turkmenistan is already oriented towards the East - China, Iran, Turkey. The development of processing and export to these countries can compensate for the pressure of the United States.	The United States does not play a key role, but a loss of investment attractiveness in high-tech industries is possible.	Isolation and sanctions can deprive the country of access to Western technologies, which is critical for the oil and gas industry and industrial modernization

**compiled by the authors*

The analysis shows that Kazakhstan and Turkmenistan are the least vulnerable to the new measures due to the presence of alternative partners and resource base, while Kyrgyzstan and Tajikistan are the most sensitive to external shocks due to limited economic diversification.

Conclusion. The conducted study provided a comprehensive assessment of the current state and prospects of trade and economic cooperation between the Central Asian countries and the United States amid intensifying protectionist trends. Based on the analysis of statistical data for the period 2003–2023, key features of export-import dynamics were identified, major trade barriers and imbalances were determined, and the most vulnerable sectors to external trade restrictions were outlined. The countries of the region demonstrate heterogeneity in both the volume of interaction with the U.S. and the structure of trade flows, which directly affects their response to changes in tariff policy.

The results obtained confirm the research objectives and goals: long-term trends in mutual trade have been analyzed, the most sensitive sectors (metallurgy, textiles, agriculture, and oil and gas) have been identified, and potential scenarios for the development of economic relations following the introduction of new tariffs in 2025 have been proposed. The scientific novelty of the study lies in the comparison of structural and institutional factors of trade interaction with foreign policy and macroeconomic conditions, as well as in the scenario-based forecasting at the level of individual countries in the region.

All Central Asian countries, despite differences in the scale of trade and levels of economic development, share a number of common barriers that hinder the development of bilateral cooperation with the United States. Among them are the low level of export diversification, the prevalence of raw materials and low-tech goods, the lack of international certification and compliance of products with US standards, as well as weak logistical connections with American markets. Additional difficulties are related to institutional factors: weak support for exporters, limited access to financial instruments, non-transparency of the business environment and the lack of sustainable channels of economic diplomacy. Solving these problems requires a common strategy and coordination at both the national and regional levels.

The practical significance of this study lies in its potential to inform the development of economic adaptation measures and foreign trade strategies in the context of growing global instability. The findings may prove useful for government agencies, expert and analytical institutions in shaping policies aimed at export diversification, supporting priority sectors, and negotiating new trade agreements. Additionally, the proposed scenarios can serve as a foundation for coordinated regional actions within the “5+1” cooperation format.

Future research may focus on a more in-depth analysis of the impact of tariff and non-tariff barriers on specific subsectors, as well as on assessing the implications of changes in the investment climate within the context of U.S.–Central Asia relations. Promising directions also include the study of mechanisms to reduce dependence on individual markets and the development of logistical, infrastructural, and digital solutions to ensure the region's sustainable integration into global trade value chains.

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ОРТАЛЫҚ АЗИЯ ЕЛДЕРІ МЕН АҚШ-ТЫҢ СЫРТҚЫ САУДА ҚАТЫНАСТАРЫ: ДИНАМИКА, КЕДЕРГІЛЕР, ПЕРСПЕКТИВАЛАР

Андатпа

Мақалада протекционизмнің артуы мен АҚШ-тың тарифтік саясатының өзгеруі жағдайында Америка Құрама Штаттары мен Орталық Азия елдері арасындағы сауда-экономикалық ынтымақтастыққа кешенді талдау жүргізілген. Зерттеудің мақсаты — «5+1» форматындағы екіжақты сауданың қазіргі жай-күйін, негізгі кедергілерін және даму перспективаларын анықтау. Зерттеу аясында АҚШ пен өңір елдері (Қазақстан, Қырғызстан, Өзбекстан, Тәжікстан, Түрікменстан) арасындағы экспорттық-импорттық ағындардың 2003–2023 жылдар аралығындағы динамикасы қарастырылып, сауда құрылымы талданып, сыртқы сауда шектеулеріне ең сезімтал салалар анықталған.

Мақалада сипаттамалық, салыстырмалы және корреляциялық талдау әдістері, ретроспективтік тәсіл, сондай-ақ халықаралық және ұлттық статистикалық дереккөздер негізіндегі деректерді визуализациялау қолданылған. АҚШ 2025 жылы енгізген жаңа тарифтік тосқауылдардың өңір елдерінің экспорттық мүмкіндіктеріне әсеріне ерекше назар аударылған. Металлургия, ауыл шаруашылығы, тоқыма және мұнай-

газ салаларын қоса алғанда, экономиканың осал секторлары анықталған. Ынтымақтастықты дамытудың үш сценарийі ұсынылған (оптимистік, реалистік және пессимистік) елдердің сыртқы экономикалық күйзелістерге институционалдық дайындық деңгейлерінің айырмашылықтарын ескере отырып.

Зерттеудің нәтижелері жаһандық сауда тұрақсыздығы жағдайында неғұрлым тұрақты сыртқы экономикалық саясатты әзірлеу үшін пайдаланылуы мүмкін.

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ВНЕШНЕТОРГОВЫЕ ОТНОШЕНИЯ СТРАН ЦЕНТРАЛЬНОЙ АЗИИ И США: ДИНАМИКА, БАРЬЕРЫ, ПЕРСПЕКТИВЫ

Аннотация

В статье проведён комплексный анализ торгово-экономического взаимодействия между Соединёнными Штатами Америки и странами Центральной Азии в условиях роста протекционизма и изменения тарифной политики США. Целью исследования является определение текущего состояния, ключевых барьеров и перспектив развития двусторонней торговли в формате сотрудничества «5+1». В рамках исследования рассмотрена динамика экспортно-импортных потоков между США и каждой из стран региона (Казахстан, Кыргызстан, Узбекистан, Таджикистан, Туркменистан) за период 2003–2023 гг., проанализирована структура торговли и выявлены наиболее чувствительные отрасли к внешнеторговым ограничениям.

В статье использованы методы описательного, сравнительного и корреляционного анализа, ретроспективный подход, а также визуализация данных на основе международных и национальных статистических источников. Особое внимание уделено влиянию новых тарифных барьеров, введённых США в 2025 году, на экспортные возможности стран региона. Определены уязвимые сектора экономики, включая металлургию, сельское хозяйство, текстильную и нефтегазовую отрасли. Представлены три сценария развития сотрудничества (оптимистичный, реалистичный и пессимистичный) с учётом различий в институциональной готовности стран к внешнеэкономическим шокам.

Выводы исследования можно использовать при разработке более устойчивой внешнеэкономической политики в условиях нестабильности мировой торговли.

