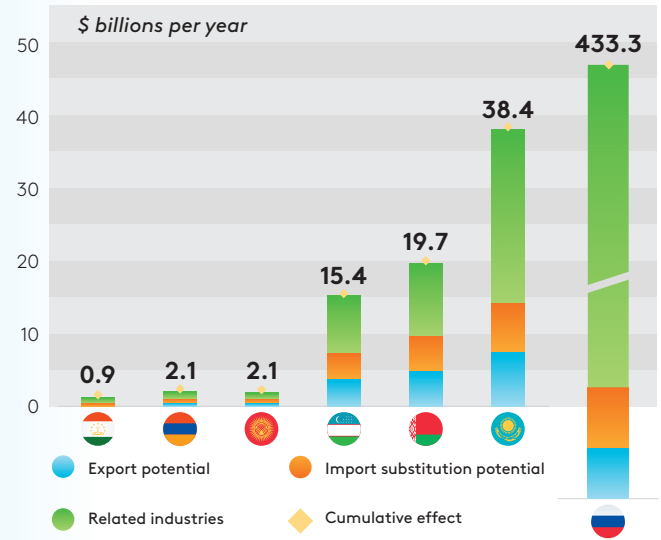
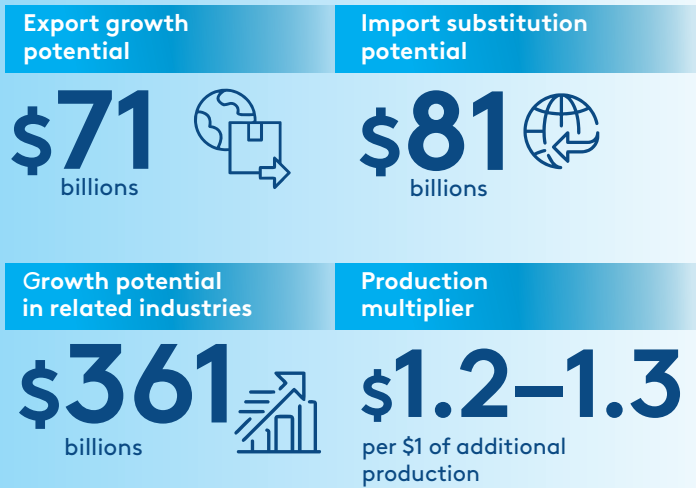


ADVANCED MANUFACTURING POTENTIAL IN EURASIA: SECTORAL NICHE FOR GROWTH

KEY FINDINGS

ANALYTICAL REPORT '25

INDUSTRY ENSURES SPEED, QUALITY AND RESILIENT ECONOMIC GROWTH



PRIORITY HIGH-LEVEL PROCESSING INDUSTRIES

KEY INDUSTRIES WITH THE GREATEST CONTRIBUTION IN CUMULATIVE EFFECT

- Machine building (transport, in particular automotive)
- Chemical complex (including pharmaceuticals)
- Metallurgical complex
- Food industry

RELATED INDUSTRIES WITH THE GREATEST MULTIPLIER EFFECT

- Electric power industry
- Wholesale and retail trade
- Transport services
- Agriculture, etc.

INDUSTRIAL DEVELOPMENT — A STRUCTURED AND STRATEGICALLY DRIVEN PROCESS

The state — a proactive strategist

- ▶ Triple partnership priority: government–business–research synergy
- ▶ Balanced strategy: exports, import substitution, industrial cooperation
- ▶ Focused support for selected niche industries
- ▶ Investing in human capital through STEM development
- ▶ Building a reliable and predictable institutional framework

Industrial cooperation and openness — key to growth

- ▶ Eurasia — a key market for the middle and high processed products (avg. 59%, from 48% for Russia to 85% for Kyrgyzstan)
- ▶ Strongest cooperation gains — in chemicals, metallurgy and machine-building
- ▶ Openness enables scale economies and technology access

Adapting to new global shifts

- ▶ Adoption of digital technologies and Industry 4.0
- ▶ Deployment of green technologies (including in energy) and the circular economy
- ▶ Focus on next-generation industrialisation: biotech, advanced materials, etc.

