



Price and Market Monitoring for Food Security in the Kyrgyz Republic

Socio-Economic Context and Policy Response

The Kyrgyz Republic continues to demonstrate strong economic growth. In January 2026, the Gross Domestic Product (GDP) increased by 9 percent compared to January 2025, reaching KGS 126 billion (USD 1.4 billion) ([National Statistics Committee](#)). This growth was driven by a 12 percent increase in goods production, a 9 percent expansion in the services sector and a 5 percent increase from net taxes on products.

In January 2026, overall inflation in the Kyrgyz Republic remained high at 9.5 percent compared to January 2025 ([National Bank](#)). This was mainly driven by global food price volatility, seasonal shifts in domestic food pricing, increased consumer demand, and annual adjustments to electricity tariffs. **The Consumer Price Index (CPI) for staple foods increased by 9.9 percent; for non-food items by 8.6 percent, for services by 11 percent and for fuel by 16 percent** in January 2026 compared to the January 2025 ([National Statistics Committee](#)). The CPI indicates a moderate rise in the cost of essential food items, and a continued increase in the cost of services and fuel.

Despite strong headline growth, high food inflation and uneven income gains leave many households unable to afford a nutritious diet. The cost of a nutrient-adequate diet increased from KGS 779 in January–August to KGS 795 in January–December 2025. The **economic non-affordability of a nutritious diet remains a burden for 43 percent of the population in January – December 2025**; 2 percent increase compared to January - August 2025. The highest levels of non-affordability observed in Batken province (81 percent) and Yssyk-Kol province (53 percent) (WFP).

Remittances remain a vital source of household income and food security. In 2025, **remittances increased by 23 percent compared to the same period in 2024** ([National Bank](#)). Remittances from the Russian Federation (RF), the main source of inflows, increased only by 16 percent. The number of officially registered Kyrgyz labor migrants in the Russian Federation declined from 650,000 to approximately 350,000 in 2025, following the introduction of migration restrictions, while there is a growing tendency in Kyrgyz migrants seeking opportunities in non-CIS foreign countries (IOM).

In 2025, the Kyrgyz Republic maintained a moderate level of self-sufficiency in key food commodities, with domestic production covering 49 percent of wheat and wheat products, 51 percent of fruits and berries, 52 percent of vegetable oil, and 79 percent of eggs (Ministry of Agriculture). These figures underscore the country's reliance on imported food, despite partial domestic production and the limited competitiveness of local producers (including millers). Imports remain substantial, accounting for 67 percent of wheat and 60 percent of vegetable oil in the domestic market.

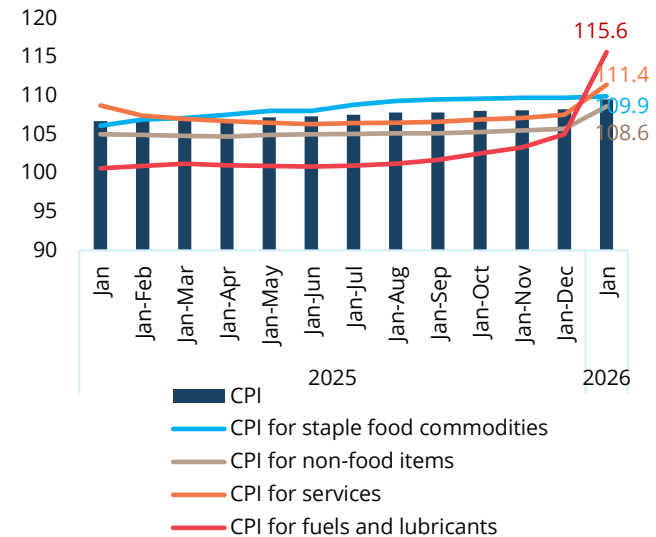
Seasonal forecasts for February–April 2026 indicate a high likelihood of continued above-normal temperatures nationwide, coupled with a tendency toward drier-than-normal precipitation in key agricultural areas. These conditions that may accelerate early vegetation development and increase evapotranspiration, thereby heightening the risk of spring moisture deficits and localized drought stress.

Key highlights

9 % GDP growth <small>Jan 2026 vs Jan 2025</small>	9.5 % Inflation <small>Jan 2026 - Jan 2025</small>	CPI - 40% increase for fruits, 15% - for meat 17% - for oil and fats <small>Jan 2026 vs. Jan 2025</small>	23 % Increase in Remittances <small>2025 vs. 2024</small>
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Risk 1: Persistent inflation may weaken vulnerable households' ability to meet basic needs. **Risk 2:** Above-normal temperatures and limited, uneven snowpack are likely to constrain soil-moisture recharge and water resource formation, increasing the risk of summer water shortages and stressing agriculture, pastures, and rural livelihoods.

Graph 1. Consumer Price Index in January 2026 compared to January 2025 (percent) Source: National Statistics Committee





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Market Update

The section discusses average national retail prices for the four-week period from 09 January to 10 February 2026, compared to the prior month and the annual average for January 2025 (Table 1).

Wheat: The price of wheat **increased by 4 percent** compared to the previous month, with an average price of 32 KGS/kg. As of 10 February 2026, the highest price for wheat was observed in Bishkek city (35 KGS/kg) and the lowest price was in Talas province (24 KGS/kg). The price is 19 percent higher compared to January 2025.

Oil (Cooking): The average price of cooking oil **increased by 2 percent** compared to the previous month, reaching 190 KGS/L. As of 10 February 2026, the highest price was observed in Naryn province (198 KGS/L), while the lowest was recorded in Talas province (171 KGS/L). The price was 19 percent higher compared to January 2025. The country has a high import dependency for vegetable oil due to its limited domestic production and insufficient capacity for processing oil seeds.

Potatoes: The average price of potatoes **increased by 4 percent** compared to the previous month, reaching 54 KGS/kg. As of 10 February 2026, the highest price was recorded in Bishkek city (59 KGS/kg), while the lowest was observed in Chuy and Talas provinces (47 KGS/kg). The price was 10 percent higher compared to January 2025.

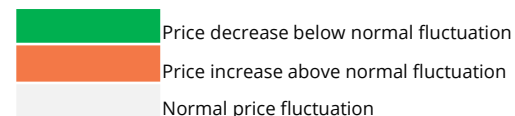
Eggs: The average price of eggs **increased by 3 percent** compared to the previous month, reaching 121 KGS/10 pcs. As of 10 February 2026, the highest egg price was recorded in Batken province (142 KGS/10 pcs), while the lowest price was observed in Talas province (113 KGS/10 pcs). Egg prices slightly decreased by 1 percent compared to January 2025.

Milk: The average price of milk **increased by 2 percent** compared to the previous month, reaching 72 KGS/L. As of 10 February 2026, the highest price was observed in Bishkek city (79 KGS/L), while the lowest was recorded in Talas province (50 KGS/L). Milk prices were 11 percent higher compared to January 2025.

Meat (mutton): The average price of mutton **increased by 1 percent** compared to the previous month, reaching 708 KGS/kg. As of 10 February 2026, the highest mutton price was recorded in Bishkek (727 KGS/kg), while the lowest price was observed in Talas province (650 KGS/kg). Mutton prices were 19 percent higher compared to January 2025, exceeding the normal annual price fluctuation range and indicating sustained upward pressure on meat prices.

Table 1. Monthly and Annual Retail Price Trends and Analysis for Socially Significant Food Commodities (WFP calculations, Data source: National Statistics Committee)

	Current month price 10 February 2026 (KGS/Kg/L)	Previous month price (KGS/Kg/L)	Monthly Trend (%)	Annual trend (compared to January 2025, %)
Bread (1st grade)	72	71	2%	9%
Milk	72	70	2%	11%
Meat (beef)	715	710	1%	14%
Meat (mutton)	708	700	1%	19%
Oil (cooking)	190	187	2%	19%
Potatoes	54	52	4%	10%
Rice (medium)	146	147	-1%	-5%
Sugar	81	80	1%	2%
Wheat	32	31	4%	19%
Wheat flour (1st grade)	54	54	0%	5%
Wheat flour (high-grade)	74	74	0%	6%
Eggs	121	118	3%	-1%
Fruits*	84	84	0%	18%



This update of the Price Monitoring Bulletin is prepared based on the operational daily food price data collected by the National Statistics Committee from 18 markets across the country and disaggregated at province level as the average value (Chuy province - Tokmok, Kara-Balta; Osh province - Osh, Uzgen, Kara-Suu and Nookat; Talas province - Talas and Manas; Naryn province - Naryn and Chaek; Batken province - Batken and Razzakov; Jalal-Abad province - Manas, Toktogul and Kerben; Yssyk-Kul province - Karakol and Balykchy; and Bishkek city). This is a secondary data analysis. *Retail prices for fruits and berries are monthly averages for January 2026 for apples, apricots, cherry, strawberries, raspberries, fresh grapes, oranges, lemons, melons, and watermelons.

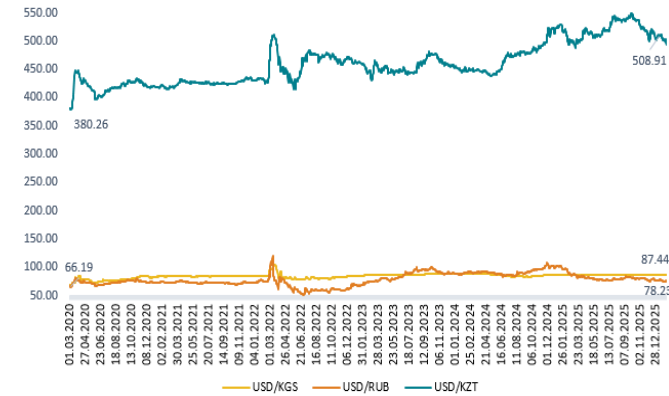
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Drivers of food price fluctuations

Exchange Rate: Currency movements remain a major driver of retail prices for imported staples such as wheat, vegetable oil, and sugar. In January 2026, the Kyrgyz Som remained stable at 87.45 KGS per USD compared to December 2025. Over the same period, the Russian Ruble appreciated by 3 percent to 77.15 RUB per USD, while the Kazakh Tenge also appreciated by 3 percent to 525.82 KZT per USD. Compared to January 2025, the Som remained unchanged, while the Ruble appreciated by 23 percent and the Tenge by 3 percent. The National Bank of the Kyrgyz Republic plays a critical role in maintaining currency stability, which is essential for managing risks and supporting food system resilience.

Global Oil and Retail Prices: As of 10 February 2026, fuel prices in the Kyrgyz Republic remained broadly stable. The price of AI-92 gasoline stood at 74.7 KGS/l, declining by 2 percent compared to late December 2025, while remaining 4 percent higher year-on-year. International oil prices increased over the period, with WTI reaching USD 61.8 per barrel and Brent USD 68.9 per barrel. Despite the rise, both benchmarks remained below their January 2025 levels. Looking ahead, Brent is projected to stay around USD 55 per barrel and WTI in the low USD 50s during the first half of 2026, as global oil inventories are expected to continue rising, increasing oversupply risks and maintaining downward pressure on prices.

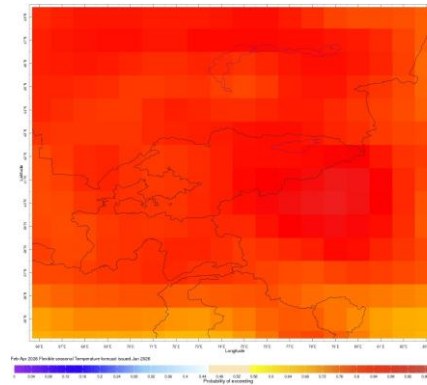
Graph 2. Exchange rates of Kyrgyz som, Russian ruble, and Kazakh tenge against the US dollar (Sources: National Banks of Kyrgyz Republic, Russia, and Kazakhstan)



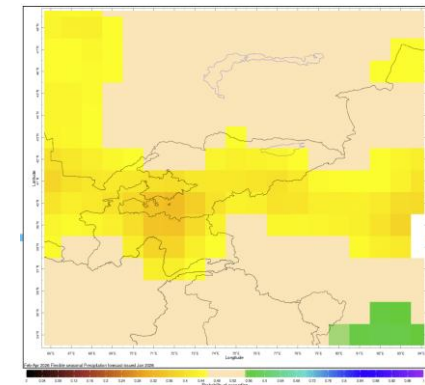
Seasonal Monitor: In January 2026, monitoring data continued to indicate **above-normal temperatures** across the major part of the Kyrgyz Republic, particularly in the central and eastern regions and high-altitude areas. Snow cover remained uneven, with limited accumulation in lowland and foothill zones, which may reduce snow-covered areas and constrain soil moisture recharge.

Seasonal forecasts for February–April 2026 suggest a high likelihood of continued **above-normal temperatures nationwide** (probability of exceedance ~0.75–0.95), combined with a tendency toward drier-than-normal precipitation in key agricultural areas (probability ~0.40–0.52). These conditions may accelerate early vegetation development and increase evapotranspiration, raising the risk of spring moisture deficits and localized drought stress. If persistent, reduced snowpack and warmer conditions could **negatively affect** pasture regeneration and crop performance, potentially **increasing risks** for agricultural production and rural livelihoods in 2026.

Map 1. Temperature Seasonal Forecast Feb- Apr 2026 (Source: IRI)



Map 2. Precipitation Seasonal Forecast Feb- Apr 2026 (Source: IRI)



Annex 1: Average retail prices for 13 Food Commodities

Commodity	10 Feb 2026	Monthly price vs. previous month	Monthly Price vs. January 2025	10 Feb 2026	Monthly price vs. previous month	Monthly Price vs. January 2025	10 Feb 2026	Monthly price vs. previous month	Monthly Price vs. January 2025	10 Feb 2026	Monthly price vs. previous month	Monthly Price vs. January 2025
	Batken province			Bishkek			Chuy province			Jalal-Abad province		
Bread (1st grade)	80	0%	0%	69	2%	4%	60	-1%	-1%	87	-1%	12%
Bread (lepeska)	113	2%	11%	106	0%	0%	87	0%	0%	109	1%	14%
Eggs	142	3%	22%	122	2%	2%	116	0%	-7%	121	6%	2%
Meat (beef)	675	2%	17%	756	2%	15%	687	0%	19%	682	1%	19%
Meat (mutton)	690	1%	12%	727	4%	26%	719	0%	21%	700	0%	16%
Milk	65	7%	-2%	79	4%	14%	60	-1%	7%	64	-3%	5%
Oil (cooking)	191	1%	13%	192	2%	17%	180	1%	20%	186	1%	22%
Potatoes	51	6%	4%	59	6%	9%	47	1%	10%	50	1%	3%
Rice (medium)	142	-3%	-6%	160	0%	-2%	127	-2%	-2%	150	-2%	-3%
Sugar	87	0%	1%	93	-1%	1%	92	0%	5%	96	1%	0%
Wheat	31	0%	26%	35	6%	18%	26	-1%	38%	30	1%	21%
Wheat flour (1st grade)	67	0%	9%	62	-2%	8%	58	1%	6%	69	1%	4%
Wheat flour (high grade)	71	0%	13%	71	-1%	5%	69	1%	8%	75	0%	11%
Commodity	Naryn province			Osh province			Talas province			Yssyk-Kol province		
Bread (1st grade)	70	0%	0%	84	0%	8%	77	0%	4%	68	0%	4%
Bread (lepeska)	108	0%	0%	111	0%	1%	90	0%	0%	106	2%	10%
Eggs	114	4%	-3%	119	3%	-14%	113	1%	-10%	118	4%	1%
Meat (beef)	708	1%	20%	670	0%	13%	632	0%	25%	677	1%	16%
Meat (mutton)	700	1%	22%	691	0%	8%	650	0%	15%	700	1%	21%
Milk	60	5%	6%	62	3%	8%	50	1%	-2%	60	0%	15%
Oil (cooking)	198	1%	21%	184	1%	15%	171	0%	9%	176	0%	20%
Potatoes	53	15%	18%	53	1%	9%	47	1%	-4%	48	3%	37%
Rice (medium)	117	1%	-12%	157	0%	-11%	107	-3%	-10%	126	0%	-7%
Sugar	100	0%	12%	94	0%	-1%	91	0%	8%	88	3%	18%
Wheat	29	1%	9%	29	0%	6%	24	0%	35%	25	0%	37%
Wheat flour (1st grade)	58	0%	-3%	71	0%	7%	64	0%	5%	58	0%	3%
Wheat flour (high grade)	73	1%	-18%	72	0%	2%	76	0%	3%	76	0%	6%

Source: WFP calculations based on the daily retail price data from the NSC market monitoring bulletin ([Мониторинг цен - Статистика Кыргызстана \(stat.gov.kg\)](http://stat.gov.kg))