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Driving Strategic Industries with Factors of Production: China's Xinjiang and Mongolia's Western Region

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Abstract: Xinjiang Autonomous Region of the People's Republic of China (Xinjiang) has established an industrial structure focused on the heavy industry by taking the advantage of having vast natural resource reserves located within the region. This has become a vital base to the country for the development of petroleum, natural gas, coal, chemicals, fuel processing, non-ferrous metals, and non-metallic mineral products. However, Xinjiang has been facing inevitable challenges of embarking on industrial reforms and developing its competitive advantages largely because of the weakened primary industrial factors and the reinforced green development requirements. As for Mongolia's Western Region, which borders Xinjiang, it has the advantages of natural resources, historical and cultural heritage, but it is still in the early stage of industrial development, relying on agricultural and raw material exports, and facing challenges such as a shortage of infrastructure and labor resources. First part of this paper, by taking the theory of factors of production, briefly explains how to create a competitive advantage within the industry sector and develop strategic industries, while the second part refers the current conditions of the Xinjiang's industrial development, the challenges encountered, and the ways being used to resolve such challenges. Finally, the paper outlines some issues for the industrial development of Mongolia's Western Region.

Keywords: China's Xinjiang, Mongolia's Western Region, factors of production, comparative and competitive advantages, strategic industries, challenges, lessons

Introduction

The People's Republic of China has undergone a remarkable transformation, evolving from a relatively poor and underdeveloped nation in the 1980s into the world's second-largest economy. The industrial sector has played a pivotal role in achieving this high level of economic

development, currently accounting for approximately 40% of the country's GDP, 28% of employment, and over 40% of the total value-added in the economy.

Over the more than 40 years since the adoption of the "Reform and Opening-Up Policy" in 1978, China has fully utilized its

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comparative advantages to create competitive strengths, continuously reinforcing them, which has been a key factor in the rapid development of its industrial sector. In the early stages of industrial growth, China focused on developing labor-intensive, export-oriented manufacturing industries.

In recent years, however, the country has shifted toward a policy prioritizing quality over quantity, emphasizing technological advancement, comprehensive modernization of the industrial supply chain, and ensuring that all manufactured products meet international standards. While China's industrial policy initially aimed to become the "world's factory," it is now considered to have achieved this goal and is shifting toward capturing more profitable segments of the global value chain, aspiring to become the "world's research and development laboratory." Consequently, China is focusing on innovation and technology, aiming to lead globally in strategic sectors such as aerospace, robotics, environmental protection, and healthcare (Markus and Daniela, 2020).

Although the industrial development of China's northern provinces and autonomous

regions bordering Mongolia trails that of their eastern and southern counterparts, these regions have successfully established industrial systems based on their natural resource advantages and have developed substantial infrastructure in many areas to support industrial growth.

Xinjiang, in particular, has emerged as a key region for trade and economic interactions between China and Mongolia's western region, securing a significant position in the bilateral trade and economic relationship. On one hand, Xinjiang serves as the closest export market for Mongolia's western region; on the other, it is a highly influential competitor. In 2024, Xinjiang engaged in a total of \$436.5 million in trade with Mongolia, including \$76.5 million in exports and \$360 million in imports (Xinjiang Statistical Yearbook, 2025). Therefore, the industrial development of this autonomous region has both positive and negative impacts on the industrial sector of Mongolia's western region. In particular, the development of an industrial system leveraging the "comparative advantages of natural resources" offers valuable lessons and experiences for Mongolia, which is pursuing a similar path.

I. Driving Strategic Industries with Factors of Production

The industrial development of any country largely depends on how the country can utilize its resource advantages or factors of production, and whether it can further develop its competitive advantage. At the beginning of industrialization, countries followed the principle of comparative advantage by utilizing their most abundant "primary factors of production" – such as land, labor, physical capital, and business

activities – to manufacture goods and engage in the international division of labor. These primary factors are fundamental inputs required for the production of goods and services. As economic development advances, the relative advantages of primary factors of production diminish, while the proportion of "advanced factors of production" – such as knowledge, skills, and technology – is increasingly integrated into

economic inputs to enhance industrial productivity. In other words, in the process of economic development, factors such as the structure of the labor force, wage levels, and land prices constantly change. At the same time, as enterprise capital accumulation increases, the division of labor becomes more specialized, the support system for industry improves, and through supporting and developing specific industrial sectors, knowledge and skills are developed in those sectors through investments in physical capital and human resources.

However, advanced factors of production are created through the long-term development of many elements, including large-scale investment, human capital development, technological innovation, sustainable operations, optimized supply chains, business skills, and collaboration. If a country cannot develop competitive advantages based on advanced factors of production and capabilities, it is highly likely to fall into the “resource comparative advantage trap” or the “low-level trap.” On the other hand, countries that manage to create and strengthen advanced factors of production and capabilities become highly competitive in a wide range of industrial sectors (Shi Dan et al, 2020).

In the early stages of economic development, countries often lack economic strength and gain low profits from the international division of labor, which limits their ability to develop competitive advantages in multiple industrial sectors simultaneously. Therefore, advanced factors of production and capabilities are formed by selecting and consistently supporting a few specific industrial sectors (strategic

industries). When selecting their strategic industries, countries consider many factors, including comparative advantage, factors of production, domestic and foreign market demand, geopolitical location, and political goals. This process focuses on the level of economic development of the country, its position in the global market, and its long-term stability. Countries often specialize in low-cost industrial sectors based on their comparative advantage. However, advanced factors can dynamically shift this advantage, making high-value-added sectors like electronics and renewable energy strategically significant. For instance, in the 1960s, South Korea relied on light manufacturing, such as textiles and clothing, but through investments in education and R&D, it developed a highly skilled workforce and technological advancements.

Some researchers, such as Alessio, have also identified the basic characteristics of high-impact, low-risk, and successful industrialization policies based on the experiences of the United States, China, and Japan. The main idea is that industrialization policies should be future-oriented rather than relying on current or past comparative advantages. Instead, long-term strategic sectors need to be identified, anticipating future technological and market trends, and policies need to be developed accordingly (Alessio et al, 2022). For example, China's industrialization policies over the past few decades have been forward-looking and focused on supporting strategic sectors. The “Made in China 2025” initiative launched in 2015 aimed to transform the country from a low-cost manufacturing center into a high-tech leader. Strategic sectors such as artificial

intelligence, robotics, renewable energy, and semiconductors were identified, and substantial government support and investments were provided. As a result, companies such as Huawei, BYD, and SMIC have emerged as global rivals.

In the case of Mongolia, apart from the mining and extraction sectors, the need to identify industrial sectors that can significantly support economic growth has become increasingly urgent.

II. Characteristics of Xinjiang's Industrial Production

Xinjiang is China's largest autonomous region with a territory of 1.66 million square kilometers and a population of 26.2 million as of 2024. It is China's second-largest pasture area and has become a base for sheep breeding and fine wool production. It is also China's largest cotton, lavender, and sunflower cultivation region. In 2024, Xinjiang's cotton production reached 5.68 million tons, accounting for more than 90% of the country's total cotton production.

It has abundant mineral and energy resources. It leads the country in oil, natural gas, and coal reserves, with coal reserves accounting for 40% of the country's total reserves, and oil and natural gas reserves accounting for 30% and 34% of the national total reserves respectively. More than 150 types of minerals have been discovered, with beryllium and lithium reserves leading the country. Xinjiang's red, Tianshan white, and snow-white marble products are famous in the region (HKTDC, 2022). Tourism resources

are also abundant, with 56 of China's 68 types of tourism resources present in the autonomous region. In 2024, it received 302 million tourists (Xinjiang Statistical Yearbook, 2025).

In 2024, Xinjiang's GDP reached 2.05 trillion yuan, an increase of 6.1% from the previous year. The added value of agricultural production was 257.2 billion yuan, an increase of 6.4% from the previous year; industrial production added value was 813.6 billion yuan, an increase of 9.1% from the previous year; and service sector added value was 982.6 billion yuan, an increase of 4.1% from the previous year. The service sector accounted for the highest share of GDP at 47.9%, followed by industry at 39.6%, and agriculture at 12.5% (Table 1). GDP per capita reached 78,660 yuan (\$11,045 USD), an increase of 5.4% from the previous year (Statistical Communiqué of the Xinjiang, 2025).

Table 1. GDP Sectoral Structure of Xinjiang (percentage)

Year	1980	2000	2021	2022	2023	2024
Agriculture	40.4	21.1	16.3	14.1	14.3	12.5
Industry	40.3	39.4	33.2	41.0	40.3	39.6
Services	19.3	39.5	50.5	44.9	45.4	47.9

Source: Author, based on the Xinjiang Statistical Yearbook Database

Heavy industry occupies a dominant position in Xinjiang's industrial structure. As

of 2024, heavy industry output accounts for more than 80% of total industrial output.

Urumqi, Karamay, and Ili are Xinjiang's main industrial centers. In recent years, the renewable energy sector has developed vigorously, accounting for about 20% of total

energy production. Other important sectors include metallurgy, textiles, and food processing (Table 2).

Table 2. Major Industrial Production of Xinjiang, as of 2024

Industry	Share of Total Industrial Output
Oil and natural gas extraction	20.4
Electricity and heat production and supply	14.9
Coal mining, washing, and processing	12.3
Chemical raw materials and chemical products	9.7
Non-ferrous metal smelting and processing	8.8
Petroleum, coal, and other fuel processing	7.6
Non-metallic mineral products	6.6
Textile manufacturing	1.8
Mining professional and auxiliary activities	1.6
Ferrous metal smelting and processing	1.0
Others	15.3

Source: Statistical Communiqué of the Xinjiang, 2025

Xinjiang has very close trade relations with Central Asian countries. With the development of the China-Europe railway line, it has become one of the rail trades centers between China, Europe, and Central Asian countries. Xinjiang's main export products include mechanical and electrical products, clothing, shoes, cultural products, textile yarn, and textiles. Main export markets are Kazakhstan, Kyrgyzstan, Tajikistan, Russia, and the USA. Main import products

include metal ores, copper, natural gas, agricultural products, and food products. Main import sources include Kazakhstan, Russia, Indonesia, Mongolia, and Tajikistan (Xinjiang Statistical Yearbook, 2025).

In short summary, Xinjiang has a traditional industrial structure based on its comparative advantages and natural resources, with particular development in oil, natural gas, coal, chemicals, metallurgy, energy, and textile production.

III. Challenges and Responses in the Industrial Development of Xinjiang

Xinjiang, leveraging its comparative advantages in abundant natural resources such as oil, natural gas, coal, and cotton production, leads China in these areas. It has established an industrial system encompassing oil, natural gas, coal, chemicals, metallurgy, energy, and textiles, becoming a significant industrial base in China. Additionally, strategic emerging

industries such as renewable energy, new materials, and biomedicine are gradually developing, creating economies of scale.

As a key node in China's "Silk Road Economic Belt" and "Opening Up to the West" strategy, Xinjiang plays a crucial role in connecting China to Central Asia and Europe. It is also a region where the "The Strategy for Large-Scale Development of

Western China” is being implemented, which aims to reduce the development gap between China’s eastern and western regions and increase the region’s economic strength and sustainable development potential, which was launched in 2000. These policies have yielded notable results, particularly in infrastructure development, such as the China-Europe Railway Express and the Yinchuan-Kunming Expressway (2,322 km), which form critical components of new land-sea corridors.

However, as economic development progresses, challenges have emerged. On one hand, the comparative advantages of traditional industries are weakening. On the other hand, China's "green development policy" imposes restrictions, necessitating the development of advanced, smart, and green industries. Challenges include a fragile ecological environment, resource and environmental quality constraints, and an industrial development level lagging approximately ten years behind China's national average. Industrial energy consumption accounts for a significant portion of total energy use, with a high reliance on fossil fuels, leading to substantial pollution and low energy efficiency. If heavy industry trends persist, economic development and environmental protection issues are expected to intensify. In other words, Xinjiang's industrial economy faces the risk of falling into a "resource-based comparative advantage trap," increasing the need to develop competitive advantages based on advanced production factors.

To address these challenges, Xinjiang's policymakers are implementing strategies to strengthen traditional industries by improving quality and expanding scale

while addressing weaknesses in technology and innovation. They are also prioritizing the development of strategically important emerging industries.

According to the Xinjiang Uygur Autonomous Region’s 14th Five-Year Plan (2021–2025), the primary focus is to enhance the quality and efficiency of agriculture, promote green development, and advance rural revitalization. By the end of the plan, grain production capacity is expected to exceed 16 million tons, improved cotton varieties to reach over 98%, fruit production to reach approximately 12 million tons, and the output value of animal husbandry to exceed 110 billion yuan.

In terms of industry, the plan aims to strengthen foundational industries, improve efficiency, promote transformation and upgrading, and elevate the level of new industrialization. Key tasks include:

1. Strengthen the Construction of the National Energy "Three Bases and One Channel"
 - National-level oil and gas extraction, processing, and reserve base
 - National base for coal, coal power, and coal chemical industries
 - Development of a national renewable energy base
 - Establishment of an energy resource transmission channel
2. Promote Transformation and Upgrading of Traditional Industries
 - Optimize chemical industry development
 - Develop the textile industry
 - Advance non-ferrous metal production

- Optimize the steel industry structure
 - Modernize building materials production
3. Actively Develop Strategic Emerging Industries
- Digital economy
 - Advanced equipment manufacturing
 - New energy, new materials, and hydrogen energy
 - Biomedicine
 - Energy conservation and environmental protection
 - New energy vehicles
4. Focus on Developing Labor-Intensive Industries
- Clothing, agricultural and sideline product processing, and electronics assembly
 - Local specialty handicrafts and tourism-related product development
5. Support Industrial Cluster Development
- High-tech clusters in Urumqi, Changji and Shihezi
 - Energy and chemical industry clusters in Zhundong, Hami and Turpan
 - Petrochemical and equipment manufacturing clusters in Kuitun, Dushanzi, Usu and Karamay
- Agricultural and sideline product processing and export-oriented clusters in Ili, Bozhou, Tacheng and Altay
 - Chemical and textile industry clusters in Korla, Kuka and Aksu
 - Labor-intensive and export-oriented industry clusters in Hotun, Kashgar, and Kezhou

Also, during the 14th Five-Year Plan, the 'Strong Human Capital Region' strategy will be implemented, focusing on enhancing university capabilities, attracting talent both domestically and internationally to key industrial sectors, and establishing comprehensive talent evaluation systems, incentives, and profit-sharing mechanisms to foster sustainable growth.

In summary, Xinjiang has successfully developed its energy (oil, natural gas, wind, and solar), specialized agriculture (cotton and grapes), and tourism sectors by leveraging its resource advantages. Moving forward, it aims to enhance advanced production capabilities in these traditional industries while selectively developing high-tech industries (e.g., advanced equipment, new materials, and biomedicine) based on the industrial revolution and cutting-edge technologies.

IV. Issues for the Industrial Development of Mongolia's Western Region

According to the Mongolia's "Regional Development Concept – 2024," Mongolia is to be developed under a regional framework comprising Khangai, Western, Northern,

Central, Eastern, Gobi, and Ulaanbaatar regions. The Western Region includes five provinces: Bayan-Ölgii, Govi-Altai, Zavkhan, Uvs, and Khovd. The total land area

of the Western Region is 415,245 thousand square kilometers.

The Western Region has relatively abundant raw material resources for industrial development. For instance, approximately 23% of the country's total meat production, which is exportable, comes from this region, ranking second after the Khangai Region. Developing small and medium-sized meat processing industries could increase meat export revenues. Additionally, the Western Region leads the country in the capacity to produce sheep and goat wool and cashmere. A total of 294 deposits and occurrences of 15 types of minerals have been identified in the Western Region. These include 12 gold deposits, 2 gold-mixed metal deposits, 1 silver deposit, 2 copper deposits, 1 silver-mixed metal deposit, 3 tungsten deposits, 1 rare earth element deposit, 1 iron deposit, 1 phosphorite deposit, and 15 coal deposits. These deposits contain 0.5 tons of gold (0.35% of Mongolia's estimated total reserves), 2,850 tons of silver (33.0%), 124.9 thousand tons of copper (2.0%), 33.6 thousand tons of tungsten (20.0%), 94.6 million tons of coal (1.0%), and 31.6 million tons of phosphorite (11.0%). To develop the mining sector in the Western Region, prioritizing the exploitation of gold, gold-mixed metals, silver, phosphorite, silver-mixed metals, tungsten, and rare earth element deposits, as well as intensifying exploration activities in these areas, is feasible (Mongolia's Western Region Development Program, 2006).

As of 2024, 12.0% of the total population, or 422.8 thousand people, reside in the Western Region, with a per capita GDP of 9.68 million MNT (2,869 USD). The

region's GDP structure shows that agriculture accounts for 42.1%, services 36.7%, and industry 21.2%. The total livestock population is 14.3 million head. The region's leading sectors are agriculture, food production, tourism, and trade based on the Western Region's economic corridor (NSOM, 2025).

The region faces challenges such as inadequate infrastructure (roads, electricity, water), harsh weather conditions, and a shortage of labor. The industrial sector, particularly small and medium-sized enterprises and services, remains underdeveloped in this region. Light and food industries processing livestock-based raw materials such as leather, wool, cashmere, meat, and milk face challenges including insufficient working capital to purchase raw materials, high bank loan interest rates, and limited competitiveness and market access for their products, hindering significant production growth.

The "Regional Development Concept – 2024" outlines the region's development goal as "connecting with the markets of Central Asian countries, Russia, and China, and specializing in special-interest tourism based on the natural pristine landscapes of the Uvs Lake Basin, Mongol Altai Range, and Khangai Range, as well as the historical and cultural heritage of diverse ethnic groups, while fostering eco-production cooperatives based on livestock and agricultural resources to become a 'Sustainable Development Region.'"

To achieve this goal, planned initiatives involving both public and private sectors include establishing eco-parks, a 4C-class airport, agricultural and food production

facilities, services, trade, exchanges, transportation and logistics complexes, light industry, technology parks, advanced technology lime and magnesite plants, construction material supply centers, regional data centers, coal-energy and metal processing plants, pharmaceutical and medical equipment storage facilities, a 15 MW solar power plant, a 90 MW hydropower plant, a 100 MW pumped-storage hydropower plant, and a 100 MW thermal power plant. Additionally, plans include upgrading port classifications, increasing their throughput capacity, and constructing vertical-axis highways and railways (Mongolia's Regional Development Concept, 2024).

In summary, while the Western Region has comparative advantages in natural resources and historical and cultural heritage, it remains in the early stages of economic development, relying on agriculture and raw material exports while importing industrial products. Industrialization is concentrated in mining and extraction, with other industrial sectors underdeveloped. The region faces shortages in human, and institutional resources, technology, and infrastructure, lacks sufficient policy documents, and while general plans exist, detailed plans and resource allocation strategies are unclear.

The Western Region is in the "initial stage of industrial development," similar to

Xinjiang, and must leverage its comparative resource advantages to develop its industrial system. For example, priority could be given to the development of mining (gold, copper, fluorite and rare earth elements etc.), organic food and agriculture production. However, compared to autonomous regions like Xinjiang, it has many disadvantages, such as insufficient infrastructure and labor resources, and lack of market, capital, and technological support, posing a high risk of falling into and remaining trapped in a "low-level resource dependency" scenario.

To avoid this, the Western Region should early on identify and focus on specific industrial sectors suited to its unique conditions and the production characteristics and markets of neighboring countries, consolidate capital and human resources, provide tax incentives, and implement consistent support to build advanced production factors and capabilities in those sectors. In other words, rather than merely serving as a raw material supplier for the industrial sectors of neighboring regions and countries, the Western Region should proactively develop advanced factors of production and strategic industries. Investing in advanced factors (technology and skills) can develop sectors such as manufacturing and renewable energy and increase economic stability.

Conclusion

Xinjiang Uyghur Autonomous Region, China, has developed heavy industries such as coal, metallurgy, petroleum, natural gas, and petrochemicals, and light industries such as agriculture,

textiles, and food, relying on its comparative advantages. In the future, it aims to create competitive advantages by upgrading, smartening, and greening these traditional industries.

An industrial structure based on natural resource advantages has also brought numerous challenges, including environmental degradation, resource scarcity, and the low-level trap. These challenges are being actively addressed by developing advanced production factors and capacity. It will actively develop strategic industries such as digital economy, advanced equipment manufacturing, new energy, new materials, hydrogen energy, and biomedicine to enhance competitiveness and develop labor-intensive industries such as clothing, agricultural by-products processing, and electronic product assembly to improve the efficiency of industrial clusters. In other words, Xinjiang's industrial structure is transforming from a backward, high-carbon, and inefficient model reliant on natural resources to one that is innovative, green, intensive, and efficient.

Mongolia's overreliance on its comparative advantage in natural resources for short-term easy profits limits the resources

needed to develop other non-mining industries. In this way, the regions of Mongolia are at high risk of remaining suppliers of raw materials and primary industrial products to China in the future, and of being trapped in the low-level trap of industrial development. In other words, on the one hand, it is necessary to create an industrial base and develop production through the stages of industrial development, but on the other hand, early targeted development of medium and high-tech industries will have a positive impact on quickly forming advanced factors of production, avoiding the low-level trap, and maintaining ecological balance. However, this requires strong political will, a realistic development vision, and a reasonable implementation strategy.

Further in-depth research on Xinjiang's industrial development, including specific industries, products, and spatial planning, is of great significance to the industrial development of Mongolia's Western Region.

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