



COMCEC AGRICULTURE OUTLOOK 2018

Agriculture Working Group
Haluk Kasnakoğlu



Agriculture Working Group Meeting
20nd September 2018
Ankara, Turkey

OUTLINE

1. Macro Agricultural Indicators

- Agricultural Value Added
- Growth Rates
- Employment
- Trade

2. Sectoral Indicators

- Crops and Livestock Production
- Land Use
- Agricultural Productivity

3. The State of Food Insecurity

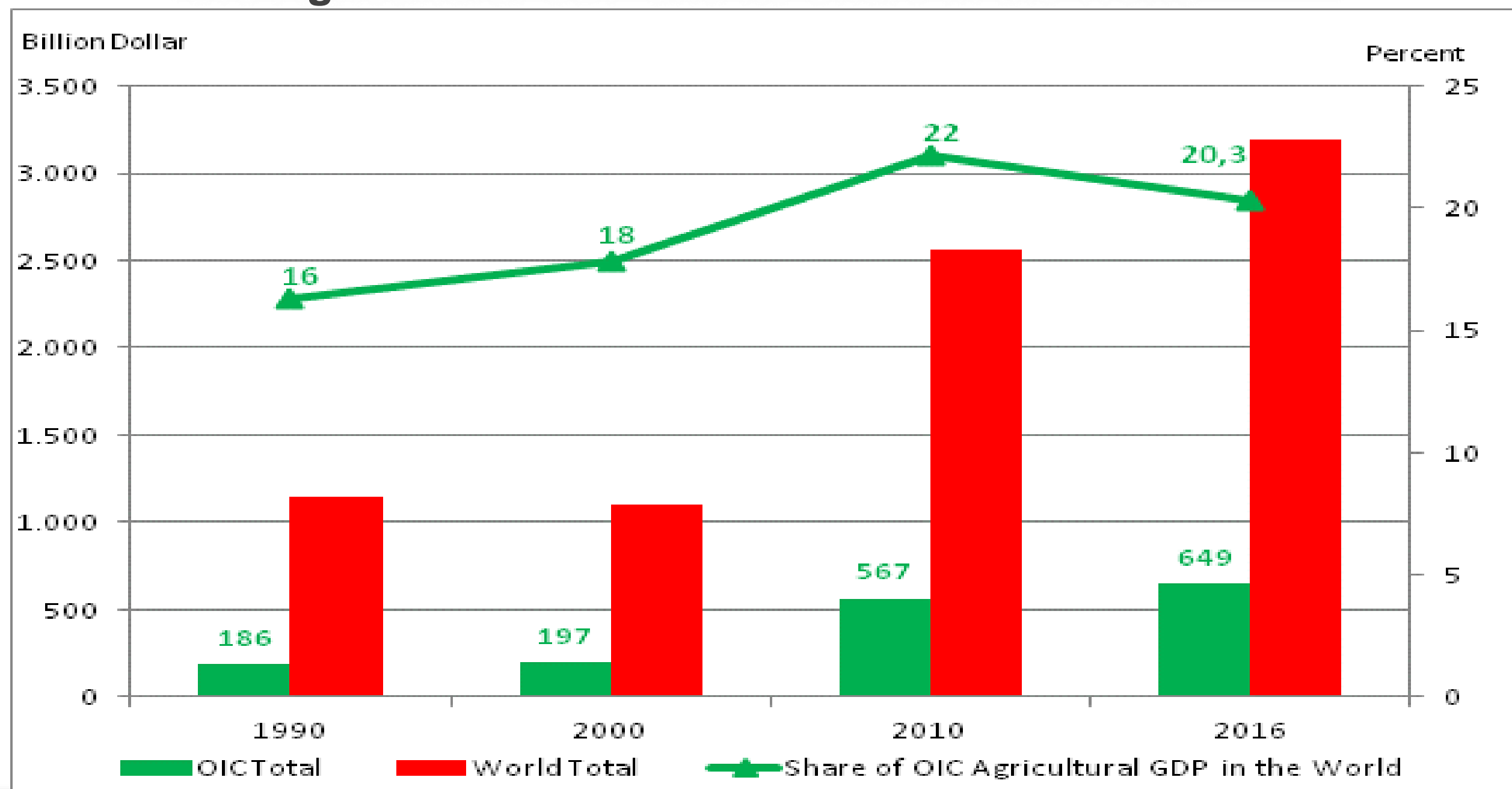
- Undernourishment



1. Macro Agricultural Indicators

➤ Agricultural Value Added

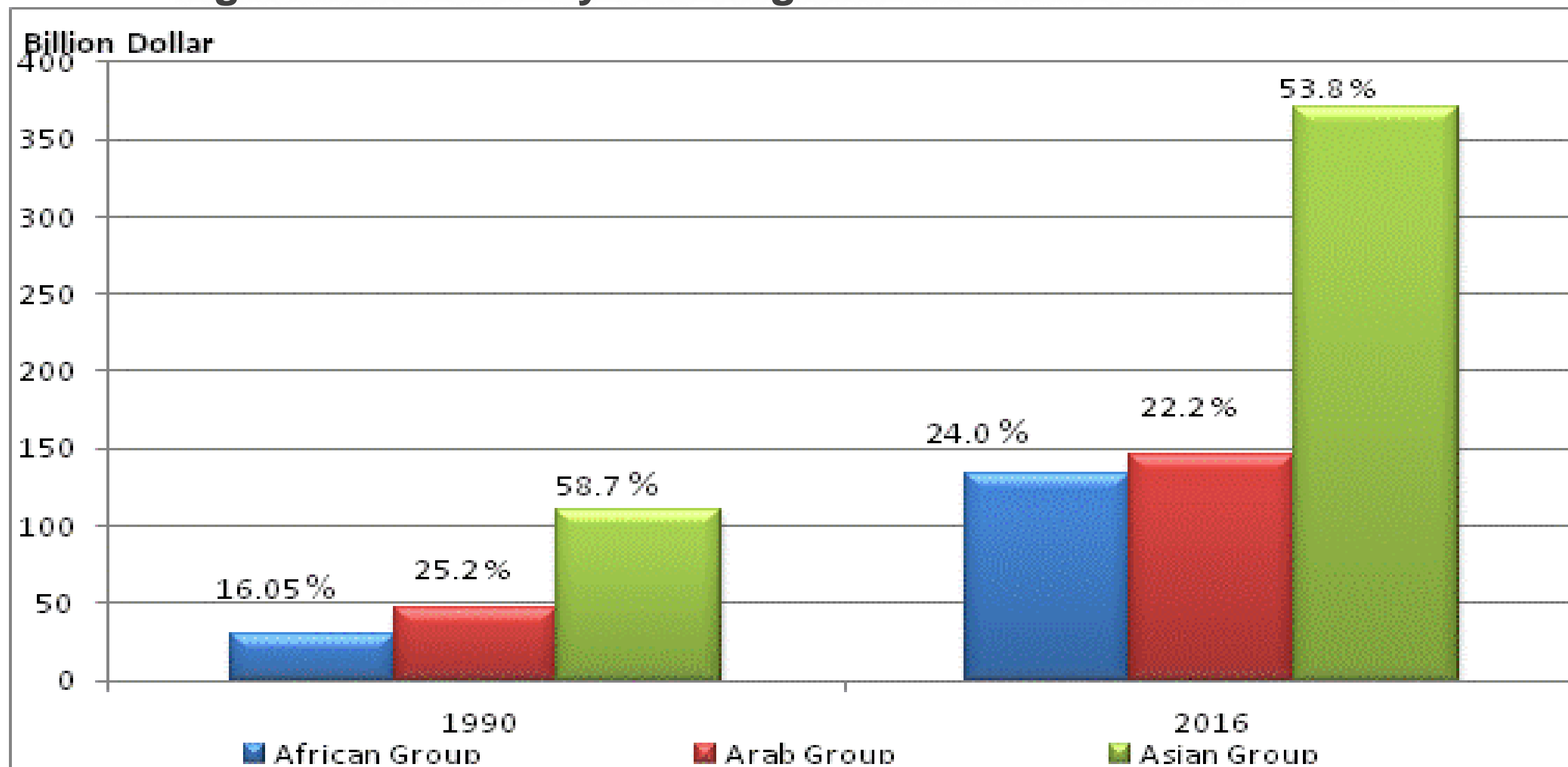
OIC Agricultural GDP and its Share in the World



1. Macro Agricultural Indicators

➤ Agricultural Value Added

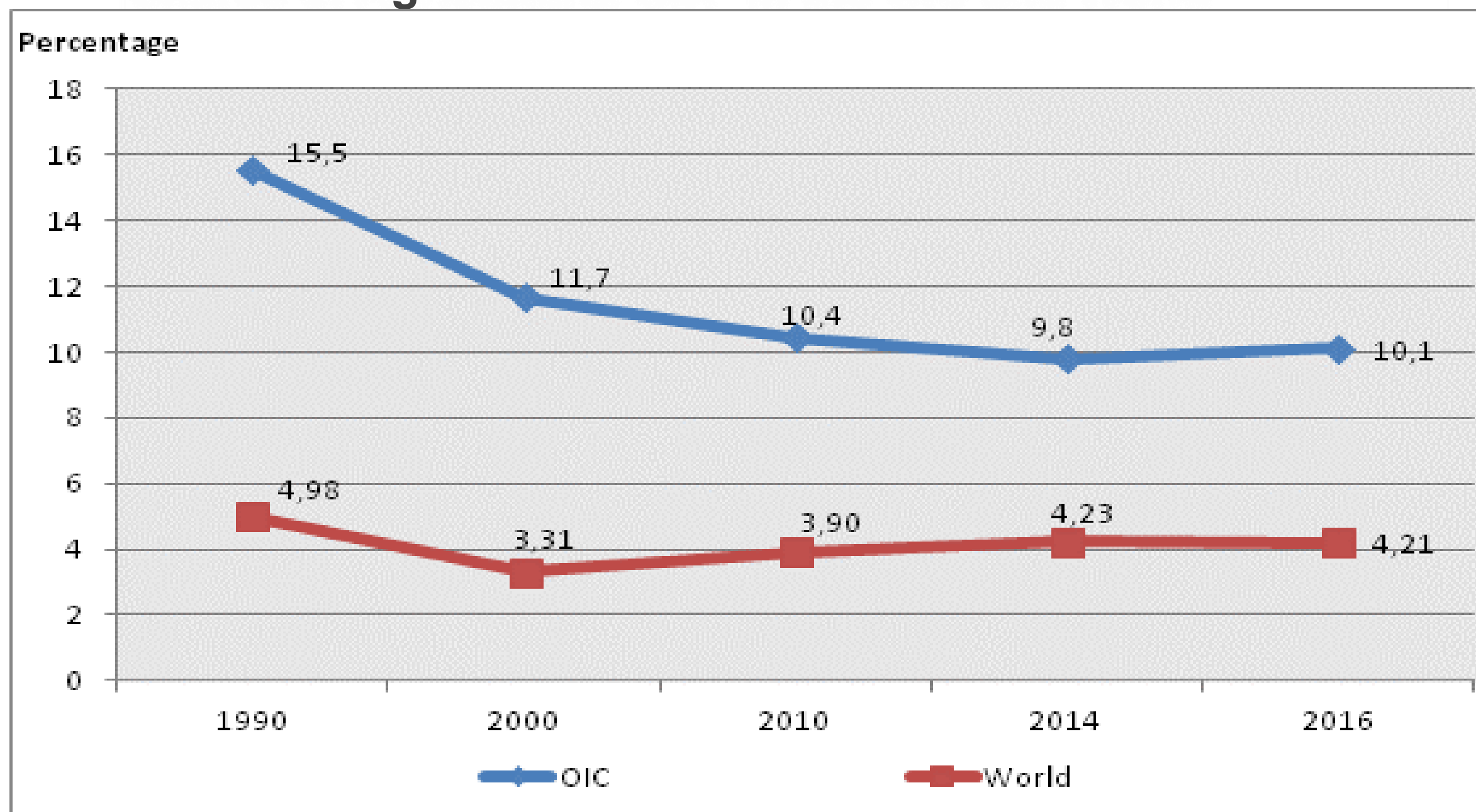
Agricultural GDP by Sub-Regions and their Shares



1. Macro Agricultural Indicators

➤ Agricultural Value Added

Shares of Agricultural GDP in the OIC and World



1. Macro Agricultural Indicators

➤ Agricultural Value Added

Agricultural GDP Rankings in the OIC

| Agricultural GDP (Billion Dollars) | 2016 | Share of Agri. in GDP, % |
|------------------------------------|----------------|----------------------------|
| Indonesia | 125.6 | 13.5 |
| Nigeria | 84.9 | 21.0 |
| Pakistan | 64.7 | 23.2 |
| Turkey | 53.4 | 6.2 |
| Iran (Islamic Republic of) | 40.4 | 9.6 |
| Egypt | 39.2 | 11.8 |
| Bangladesh | 31.1 | 14.0 |
| Sudan | 26.6 | 27.0 |
| Malaysia | 25.7 | 8.7 |
| Algeria | 19.6 | 12.3 |
| Top Ten Total | 511.0 | Top 10 in OIC 78.7% |
| OIC Total | 649.2 | OIC in World 20.3% |
| World | 3,196.6 | |



1. Macro Agricultural Indicators

➤ Growth Rates

Average Annual Agricultural Growth and Economic Growth

| Period | OIC | | World | |
|-------------|-------------|-----------------|-------------|-----------------|
| | Agr. Growth | Economic Growth | Agr. Growth | Economic Growth |
| (1994-2004) | 3.32 | 4.13 | 2.65 | 3.06 |
| (2004-2016) | 3.53 | 4.54 | 2.81 | 2.24 |
| (1994-2016) | 3.38 | 4.35 | 2.74 | 2.61 |

Average Annual Agricultural Growth by OIC Regions

| Period | African Group | | Arab Group | | Asian Group | |
|-------------|---------------|--------------|-------------|--------------|-------------|--------------|
| | Agr. Growth | Econ. Growth | Agr. Growth | Econ. Growth | Agr. Growth | Econ. Growth |
| (1994-2004) | 6.54 | 5.41 | 4.06 | 4.09 | 2.17 | 3.94 |
| (2004-2016) | 4.89 | 4.97 | 2.32 | 3.94 | 3.33 | 4.89 |
| (1994-2016) | 5.64 | 5.17 | 3.12 | 4.01 | 2.81 | 4.46 |

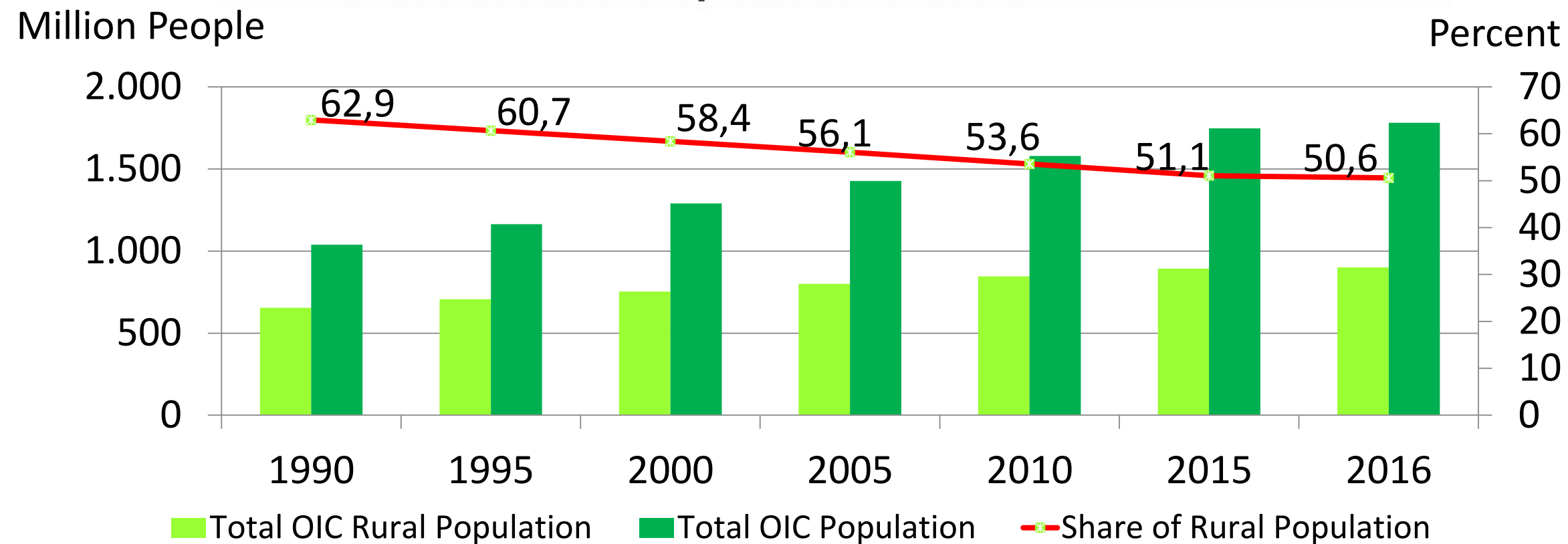
1. Macro Agricultural Indicators

➤ Employment

Population Growth in the OIC and World

| Period | African Group | Arab Group | Asian Group | OIC | World |
|-------------|---------------|-------------|-------------|-------------|-------------|
| (1995-2005) | 2.71 | 2.19 | 1.71 | 2.04 | 1.32 |
| (2005-2016) | 2.83 | 2.32 | 1.53 | 2.01 | 1.20 |
| (1995-2016) | 2.77 | 2.26 | 1.62 | 2.02 | 1.26 |

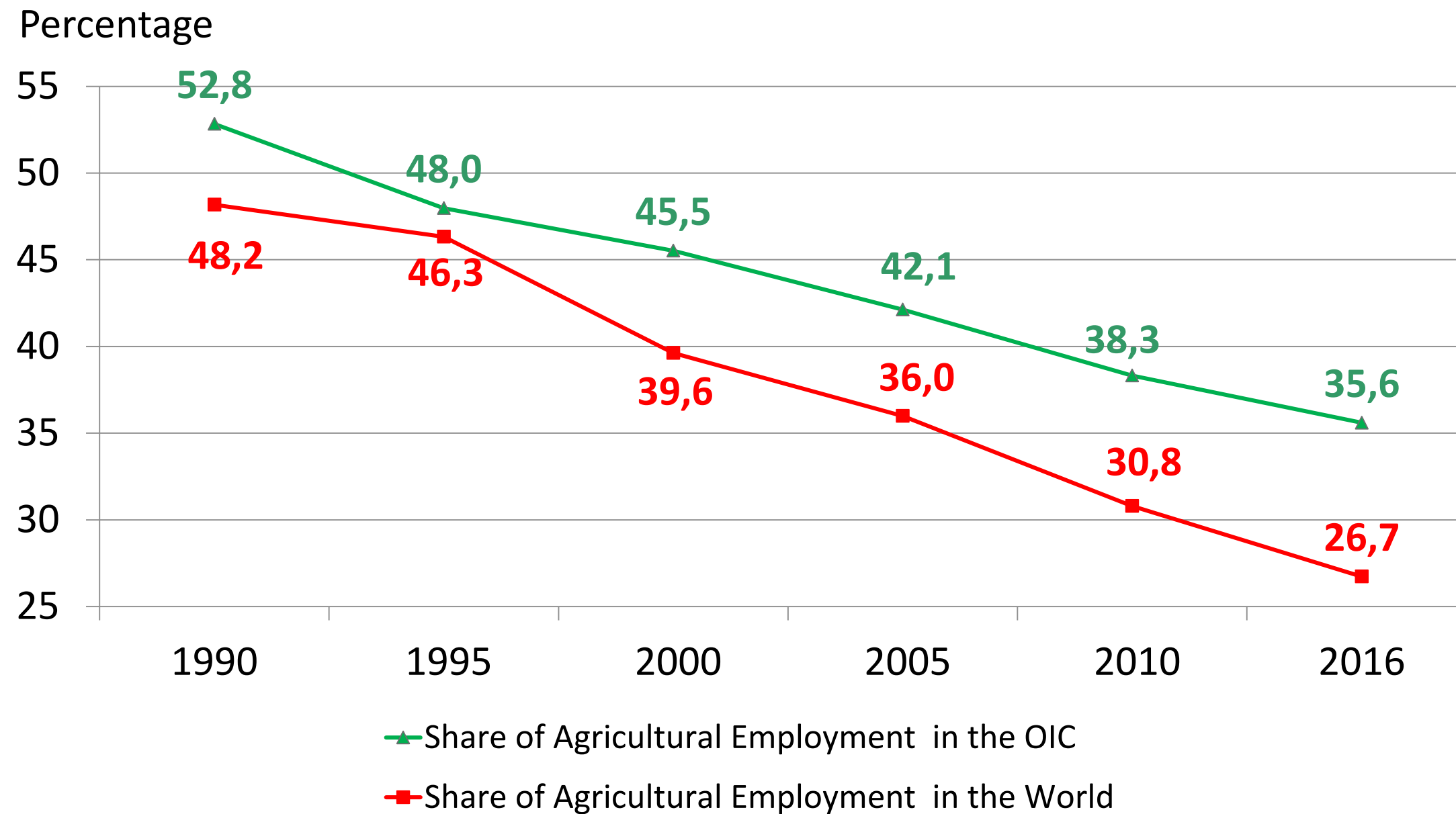
Share of Rural Population in the OIC



1. Macro Agricultural Indicators

➤ Employment

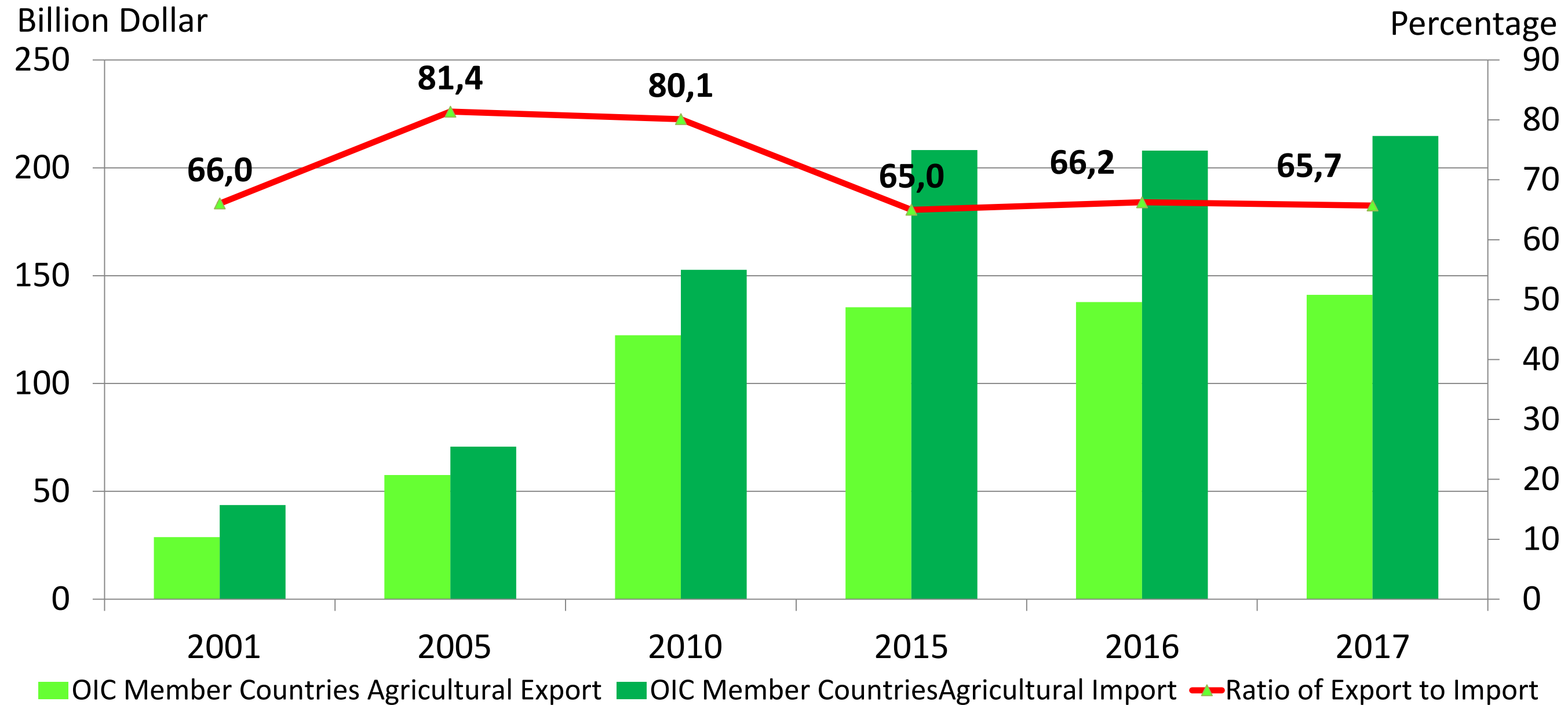
Share of Agricultural Employment in the OIC and World



1. Macro Agricultural Indicators

➤ Trade

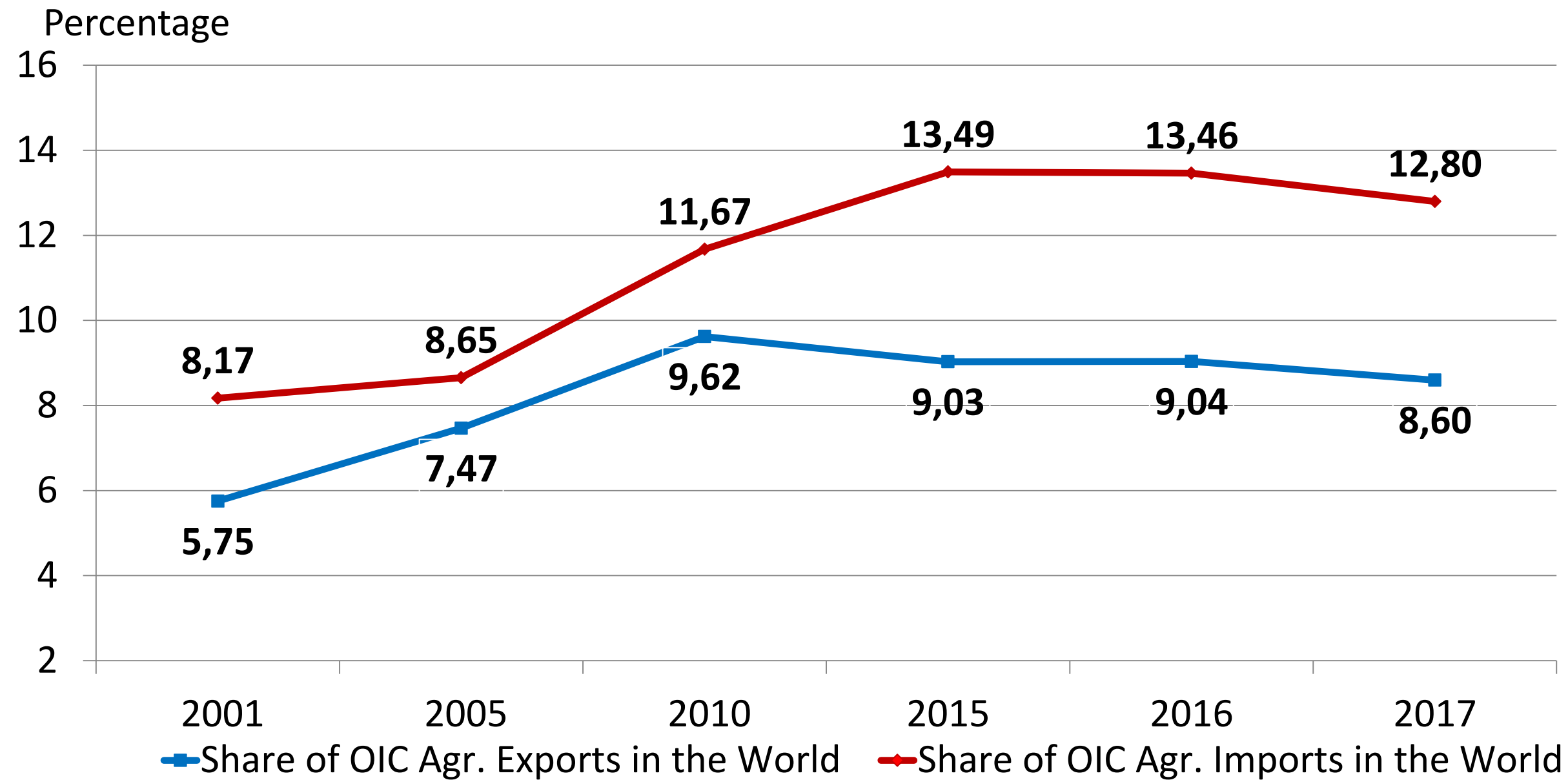
Agricultural Exports and Imports in the OIC



1. Macro Agricultural Indicators

➤ Trade

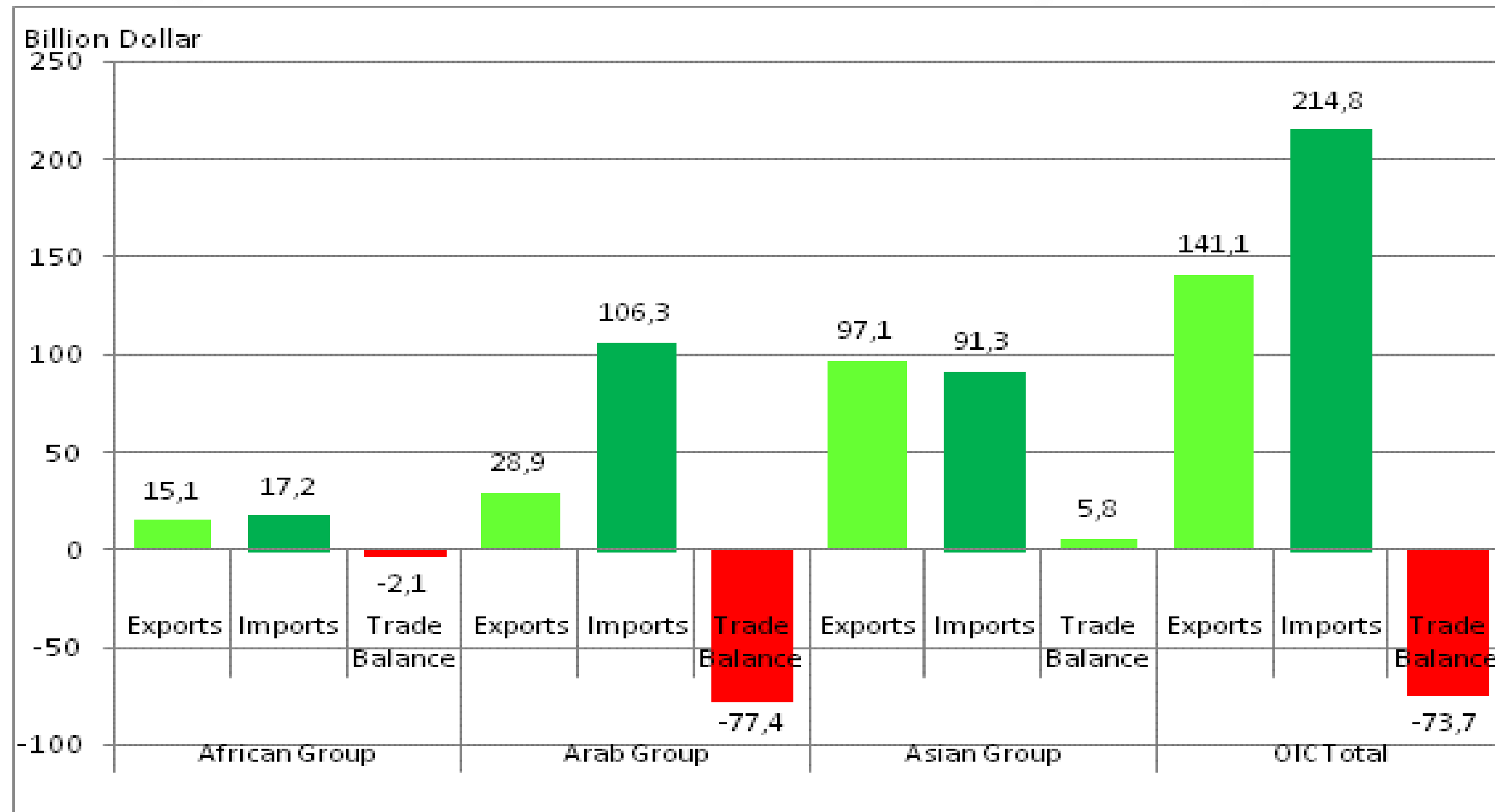
OIC Agricultural Trade Performance in the World



1. Macro Agricultural Indicators

➤ Trade

Agricultural Trade Balance in the OIC by Sub-Regions



1. Macro Agricultural Indicators

➤ Trade

OIC Agricultural Trade by Partner Countries (%)

| | EXPORTS (2017) | IMPORTS (2017) |
|-----------------------|---|--|
| Africa Group | | |
| Share of Top 5 | 46.1 | 36.3 |
| Top 5 Countries | Netherlands, France, USA, Belgium, India | India, France, Thailand, Brazil, USA |
| Share of Top 15 | 75.5 | 68.4 |
| Africa Share in Top15 | 3.2 | 4.9 |
| OIC Share in Top 15 | 8.8 | 8.5 |
| Arab Group | | |
| Share of Top 5 | 39.4 | 35.3 |
| Top 5 Countries | Saudi Arabia, Oman, Spain, UAE, Kuwait | Brazil, India, Turkey, USA, Argentina |
| Share of Top 15 | 66.3 | 64.1 |
| Arab Share in Top15 | 40.4 | 8.8 |
| OIC Share in Top 15 | 40.4 | 14.9 |
| Asia Group | | |
| Share of Top 5 | 30.9 | 29.7 |
| Top 5 Countries | India, China, USA, Netherlands, Singapore | Brazil, USA, Russian F. China, Indonesia |
| Share of Top 15 | 57.4 | 73.3 |
| Asia Share in Top15 | 36.2 | 43.6 |
| OIC Share in Top 15 | 8.7 | 11.8 |

2. Sectoral Indicators

➤ Land Use

Land Use in the OIC and its Share in the World, 2015

| | Total Land Area | Agricultural Area | Arable Land | Permanent Crops | Permanant Meadows and Pastures |
|--------------------------------------|-----------------|-------------------|-------------|-----------------|--------------------------------|
| OIC (million ha) | 3,179 | 1,398 | 310 | 63 | 1,022 |
| Share in Total Agr. Area (%) | | 100.0 | 22.1 | 4.5 | 73.2 |
| World (million ha) | 13,009 | 4,869 | 1,425 | 165 | 3,275 |
| Share of OIC in the World (%) | 24.4 | 28.7 | 21.7 | 38.2 | 31.2 |

Shares of Land Use in OIC Sub-Regions , 2015

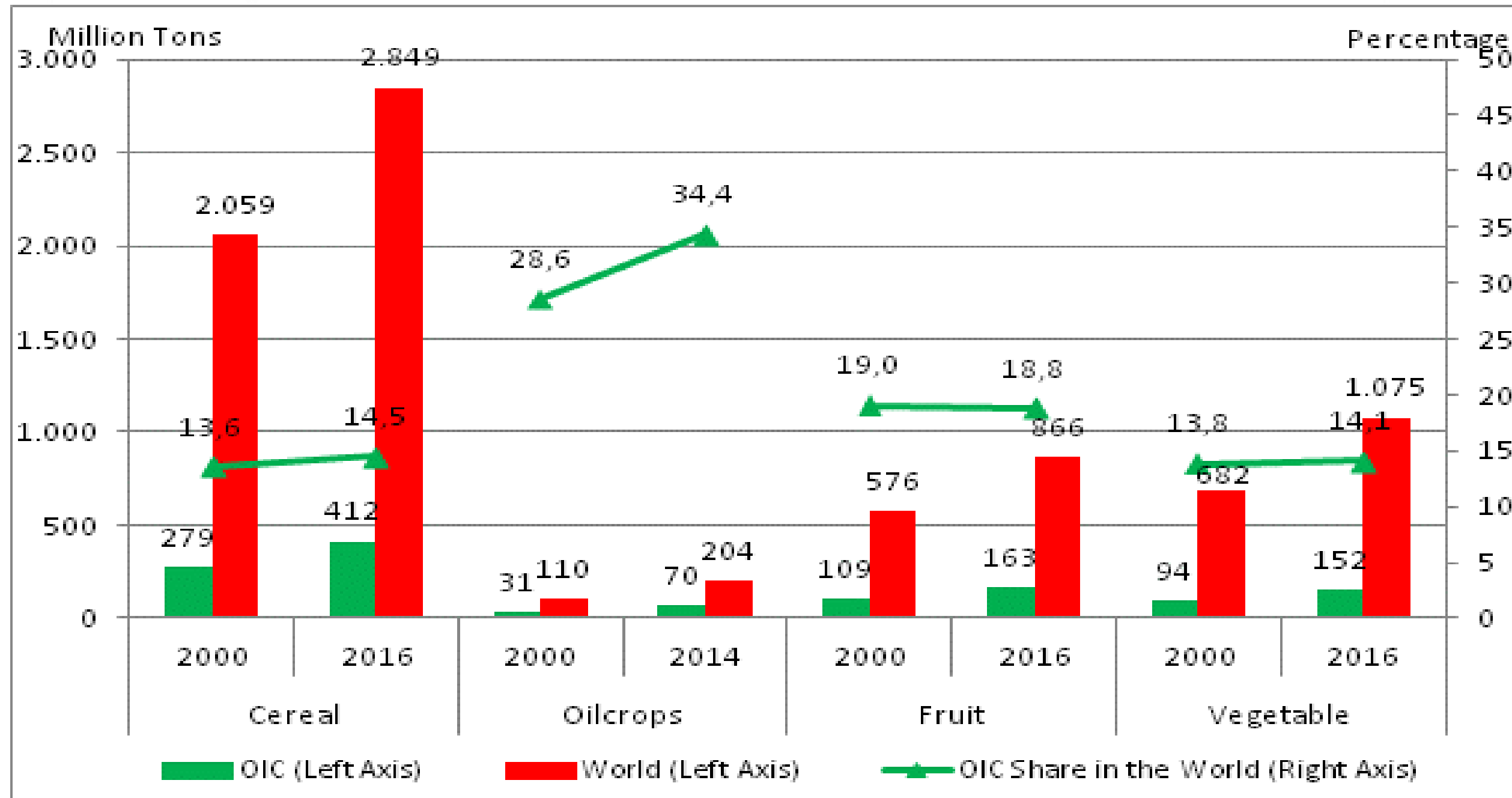
| OIC Sub-region | Total Land area | Agricultural Area | Arable Land | Permanent Crops | Permanent Meadows and Pastures |
|--------------------------|-----------------|-------------------|-------------|-----------------|--------------------------------|
| African Group (%) | 24.2 | 25.5 | 33.6 | 27.7 | 23.0 |
| Arab Group (%) | 42.8 | 36.3 | 19.2 | 13.4 | 42.8 |
| Asian Group (%) | 33.0 | 38.1 | 47.3 | 58.9 | 34.2 |
| OIC Total (%) | 100 | 100 | 100 | 100 | 100 |



2. Sectoral Indicators

➤ Crops, Livestock Products and Fisheries Production

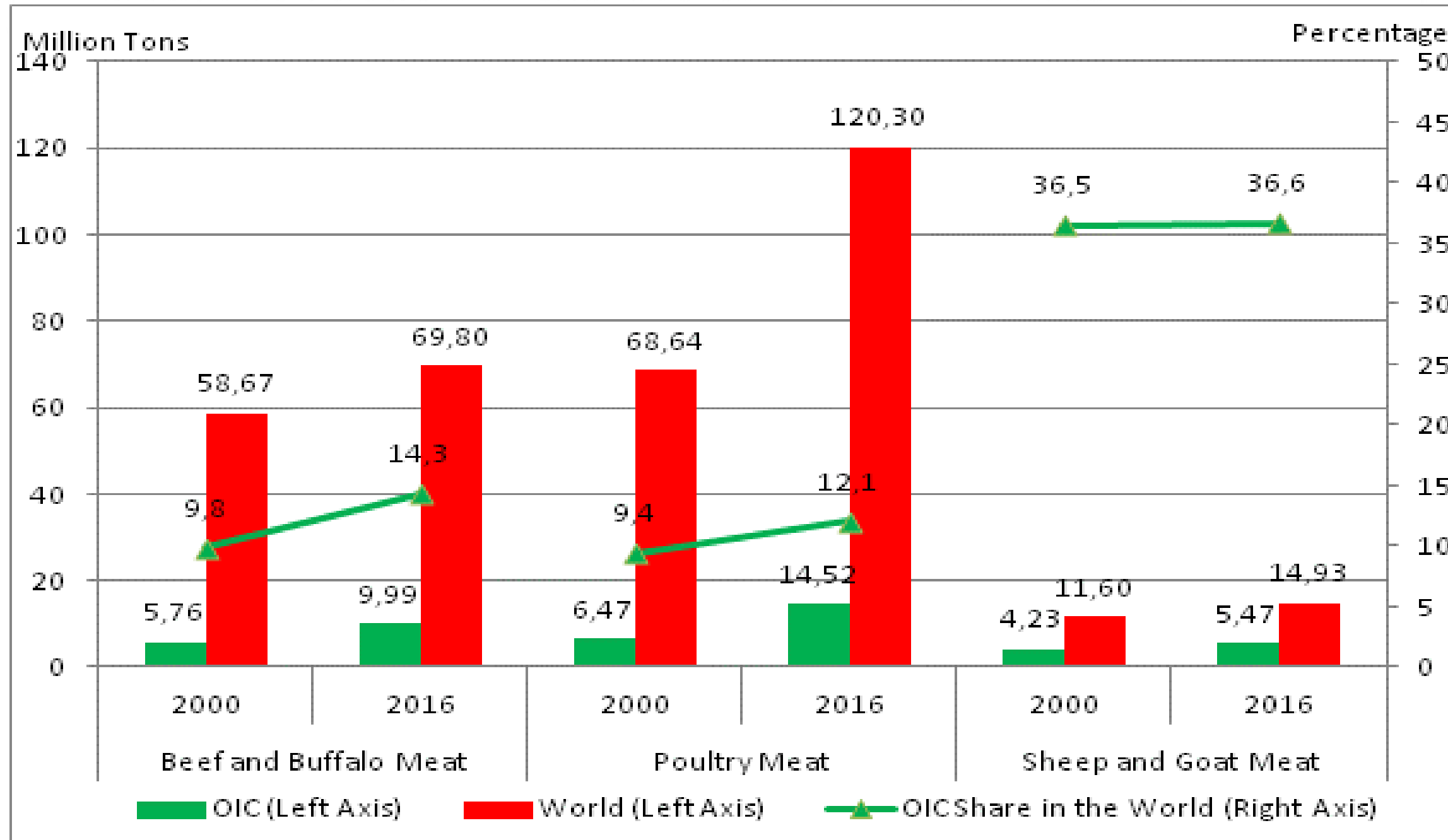
Crop Productions in the OIC and Shares in the World



2. Sectoral Indicators

➤ Crops, Livestock Products, and Fisheries Production

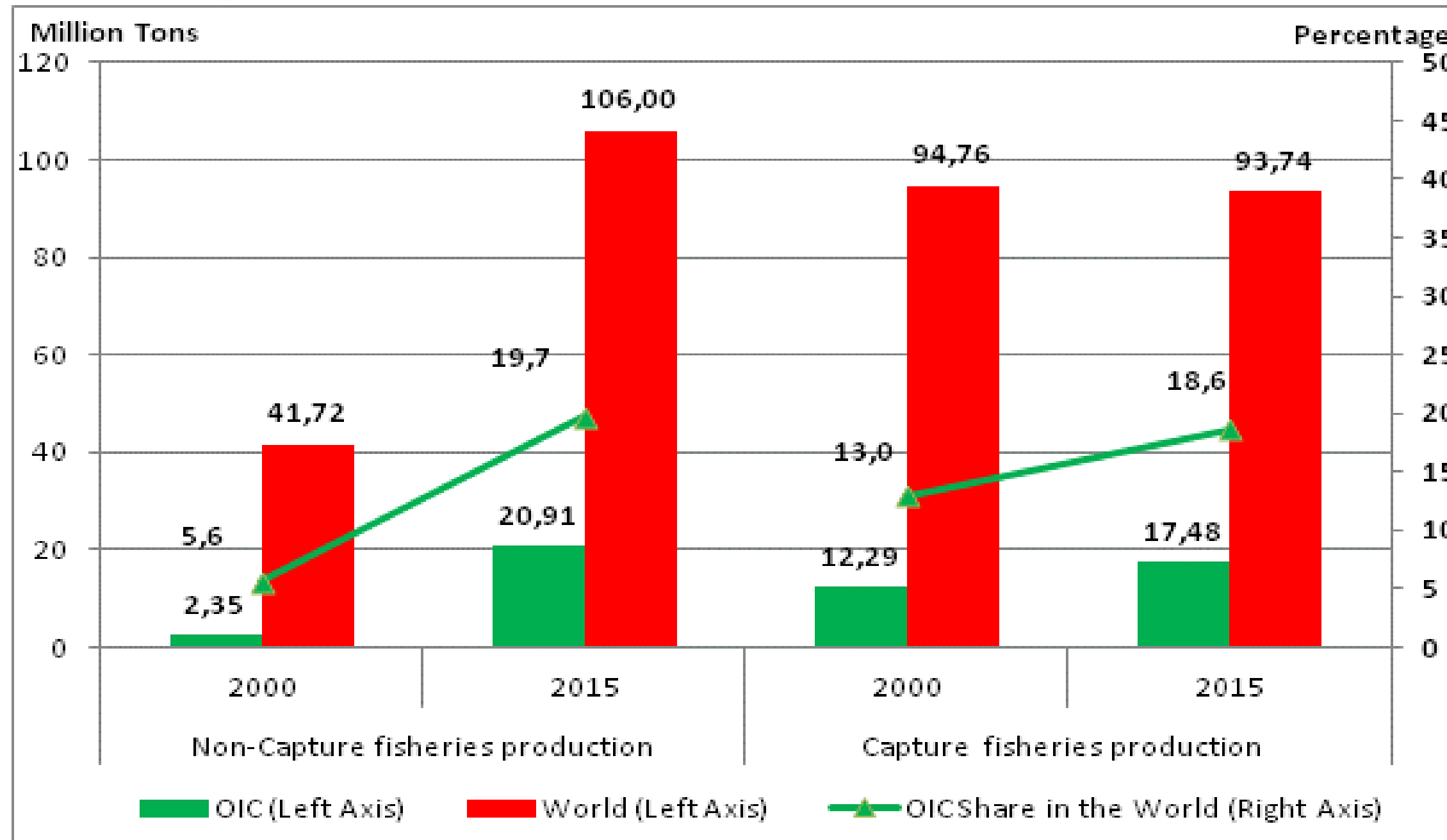
Meat Production in the OIC and Shares in the World



2. Sectoral Indicators

➤ Crops, Livestock Products, and Fisheries Production

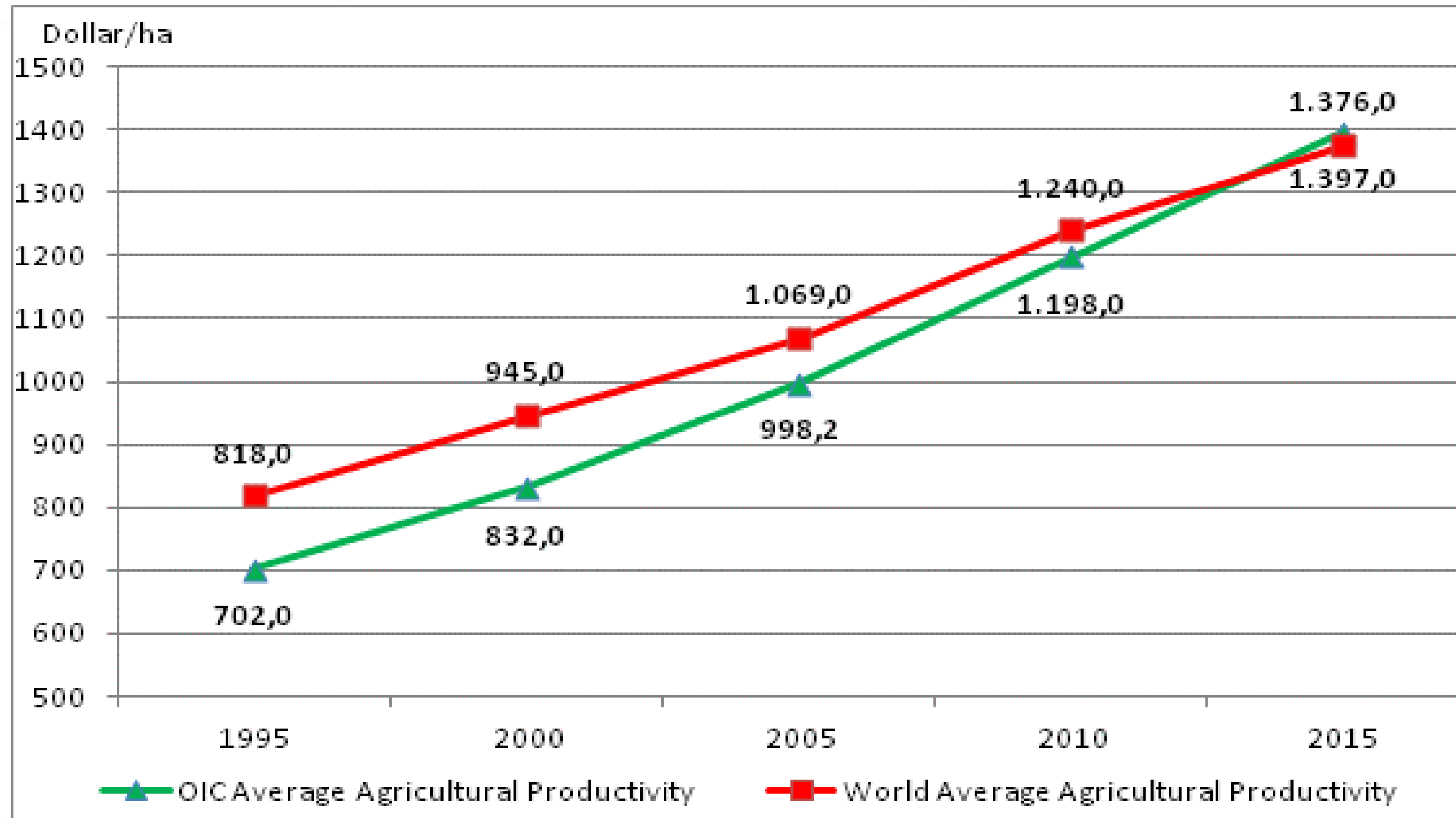
Fishery Productions in the OIC and Shares in the World



2. Sectoral Indicators

➤ Agricultural Productivity

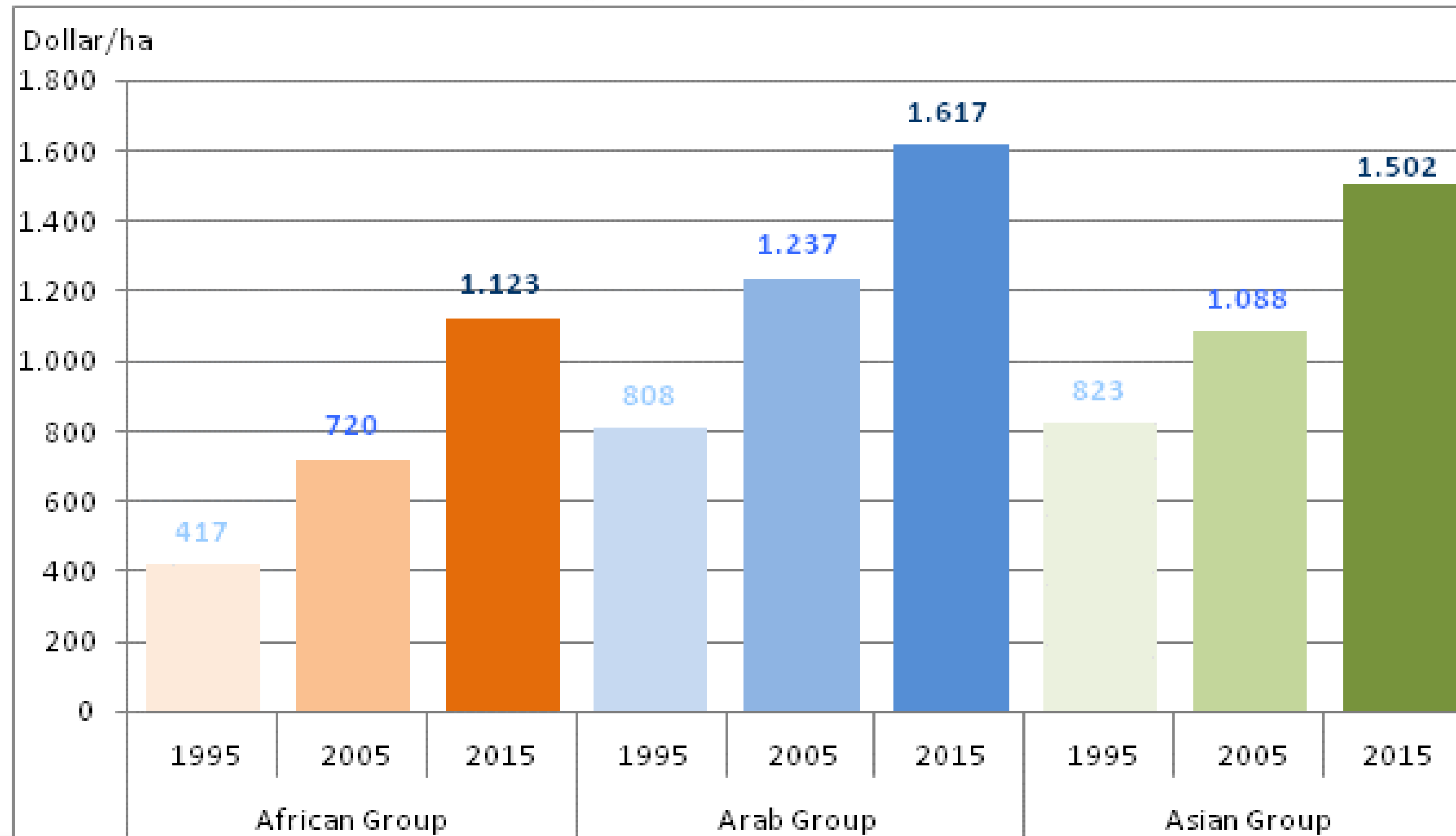
Land Productivity in the OIC and the World (Agr. GDP at 2005 constant prices)



2. Sectoral Indicators

➤ Agricultural Productivity

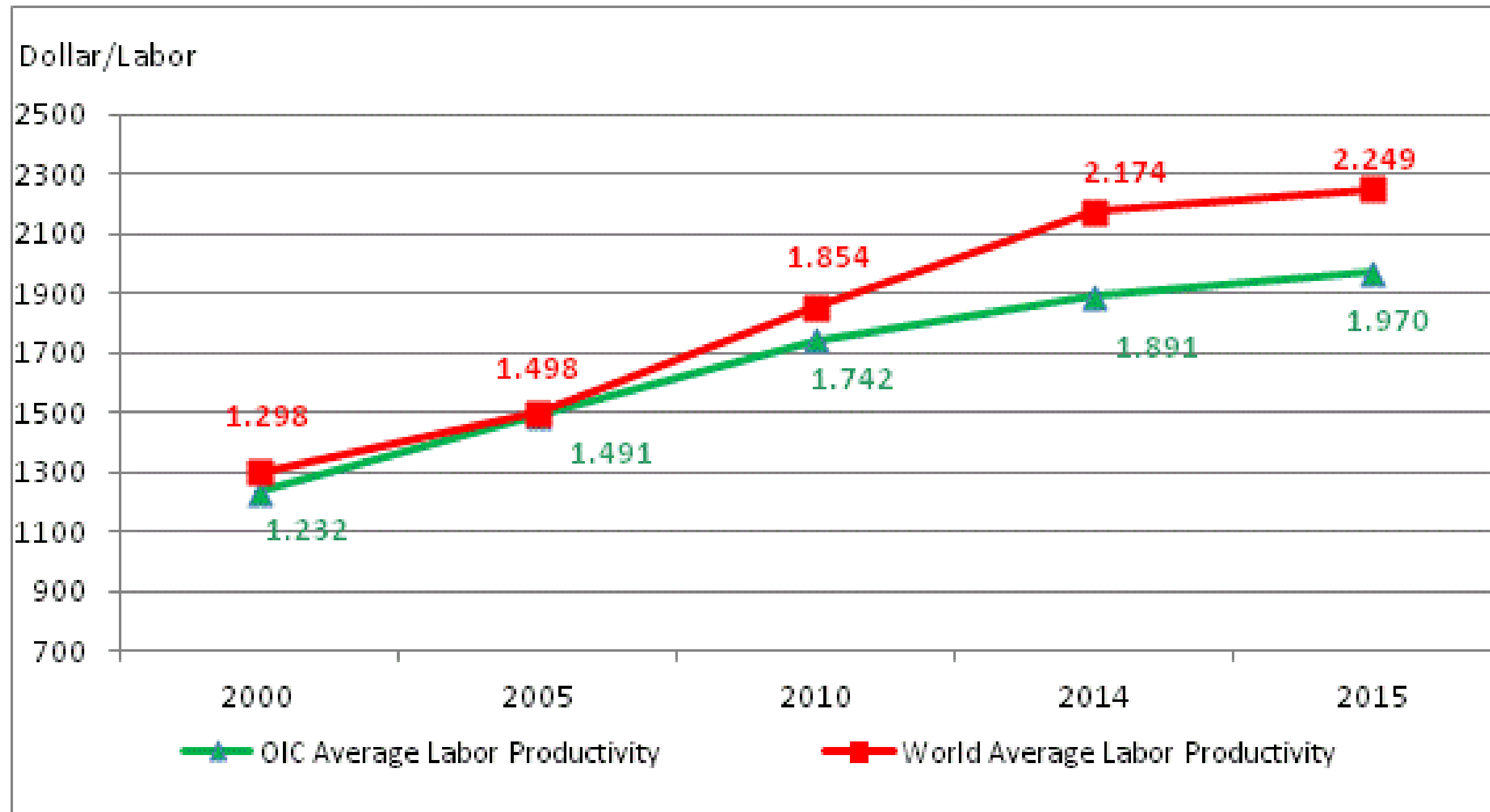
Land Productivity in the OIC by Sub-Regions (Agr. GDP at 2005 constant prices)



2. Sectoral Indicators

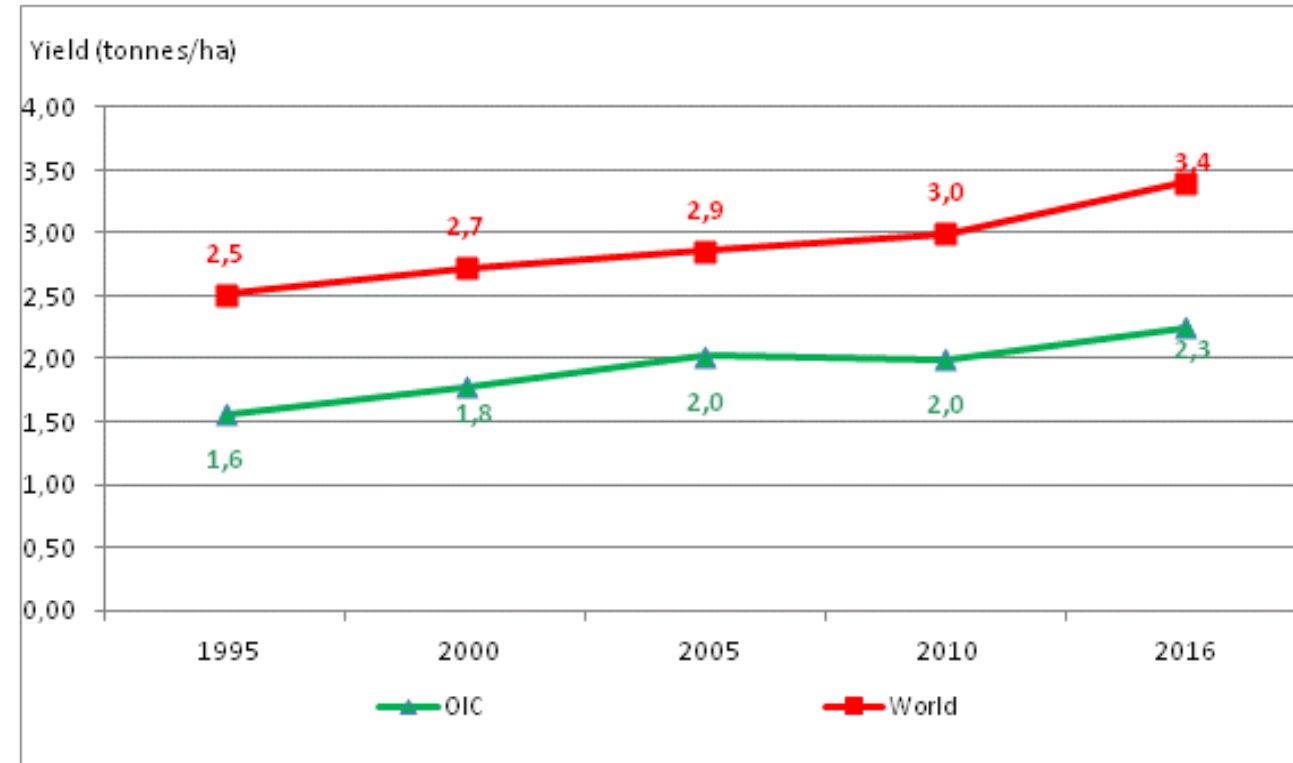
➤ Agricultural Productivity

Labor Productivity in the OIC and World (Agr. GDP at 2005 constant prices)



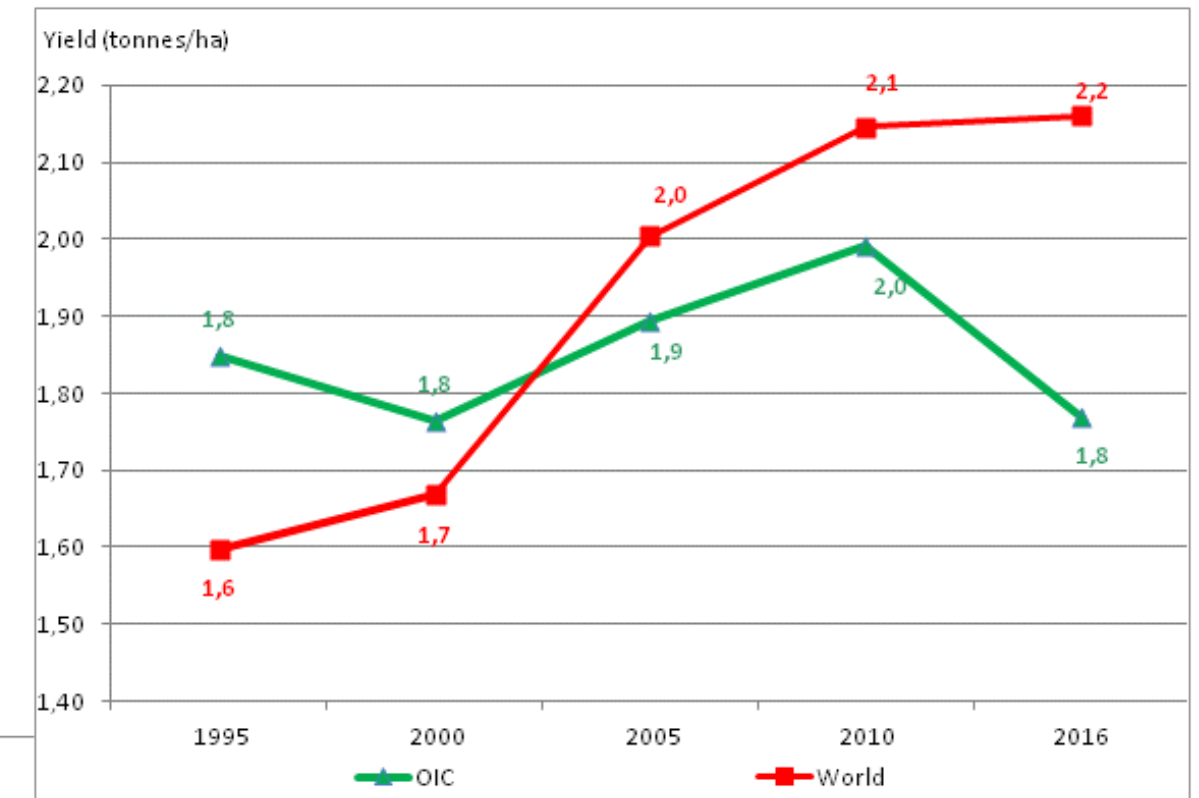
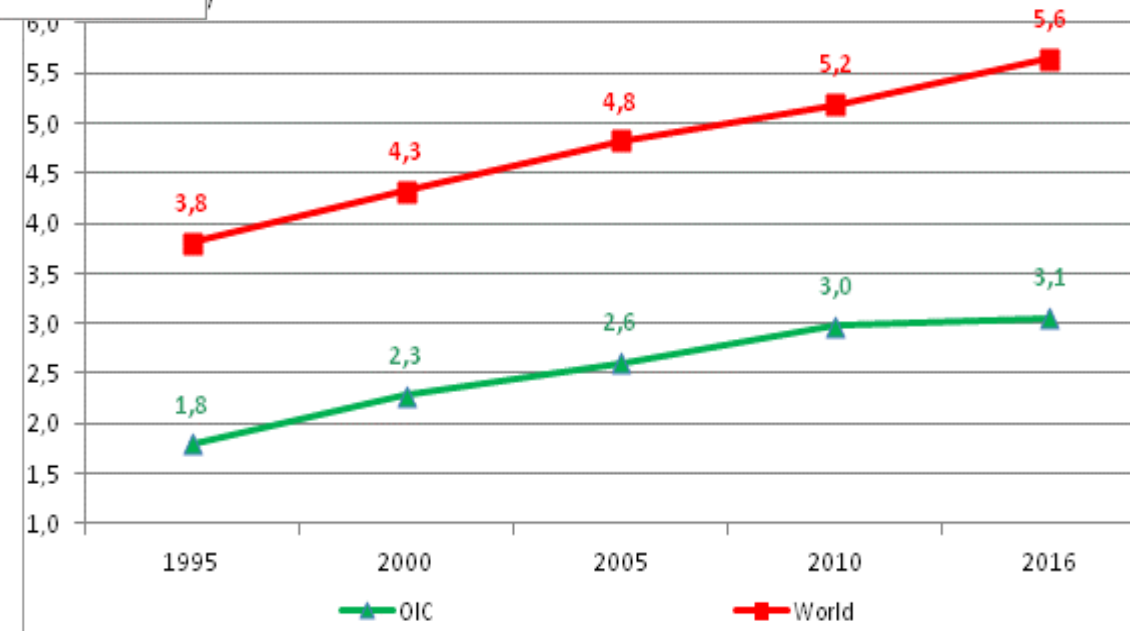
2. Sectoral Indicators

➤ Agricultural Productivity



Wheat Yields

Maize Yields

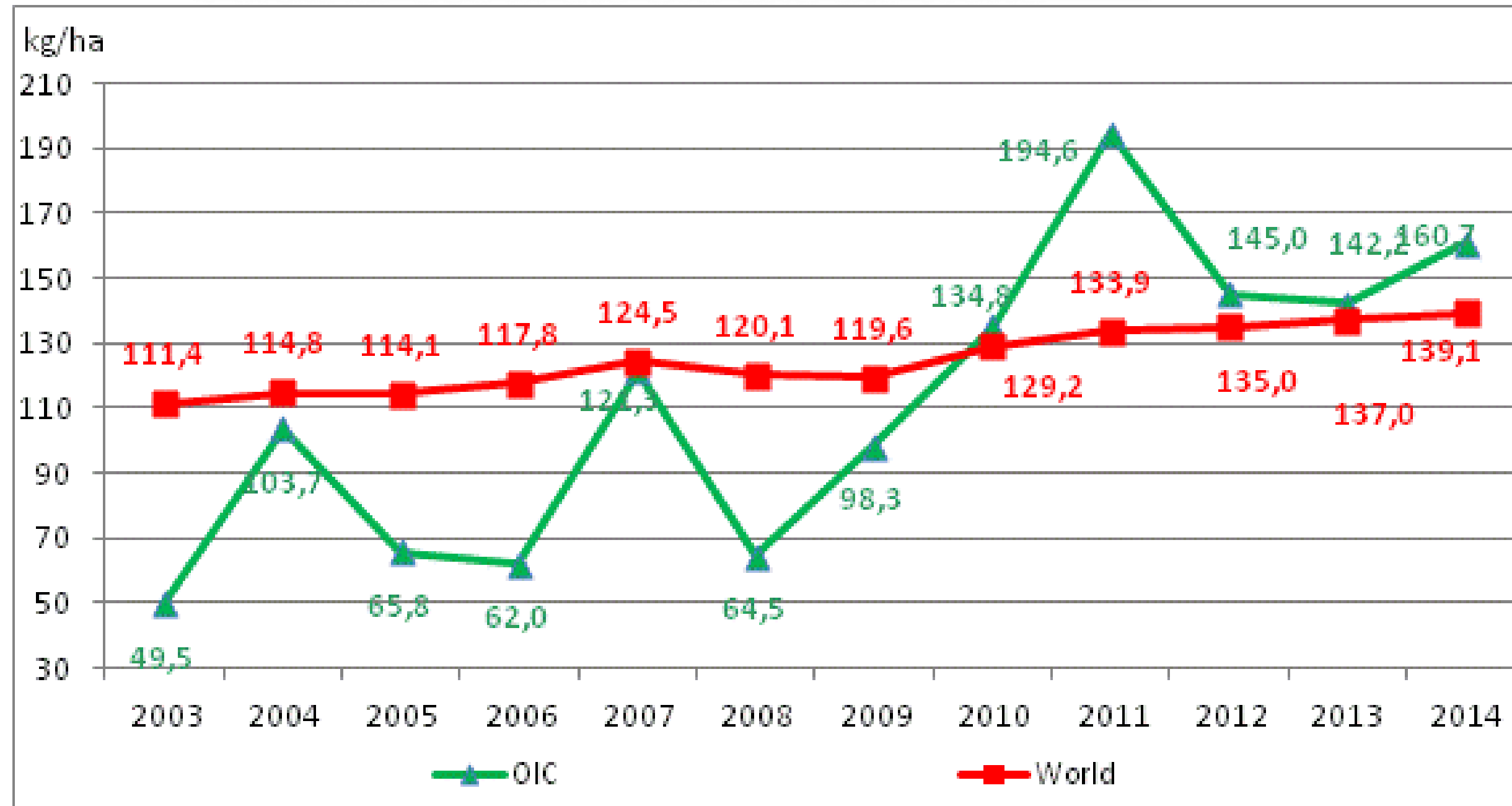


Cotton Yields

2. Sectoral Indicators

➤ Agricultural Productivity

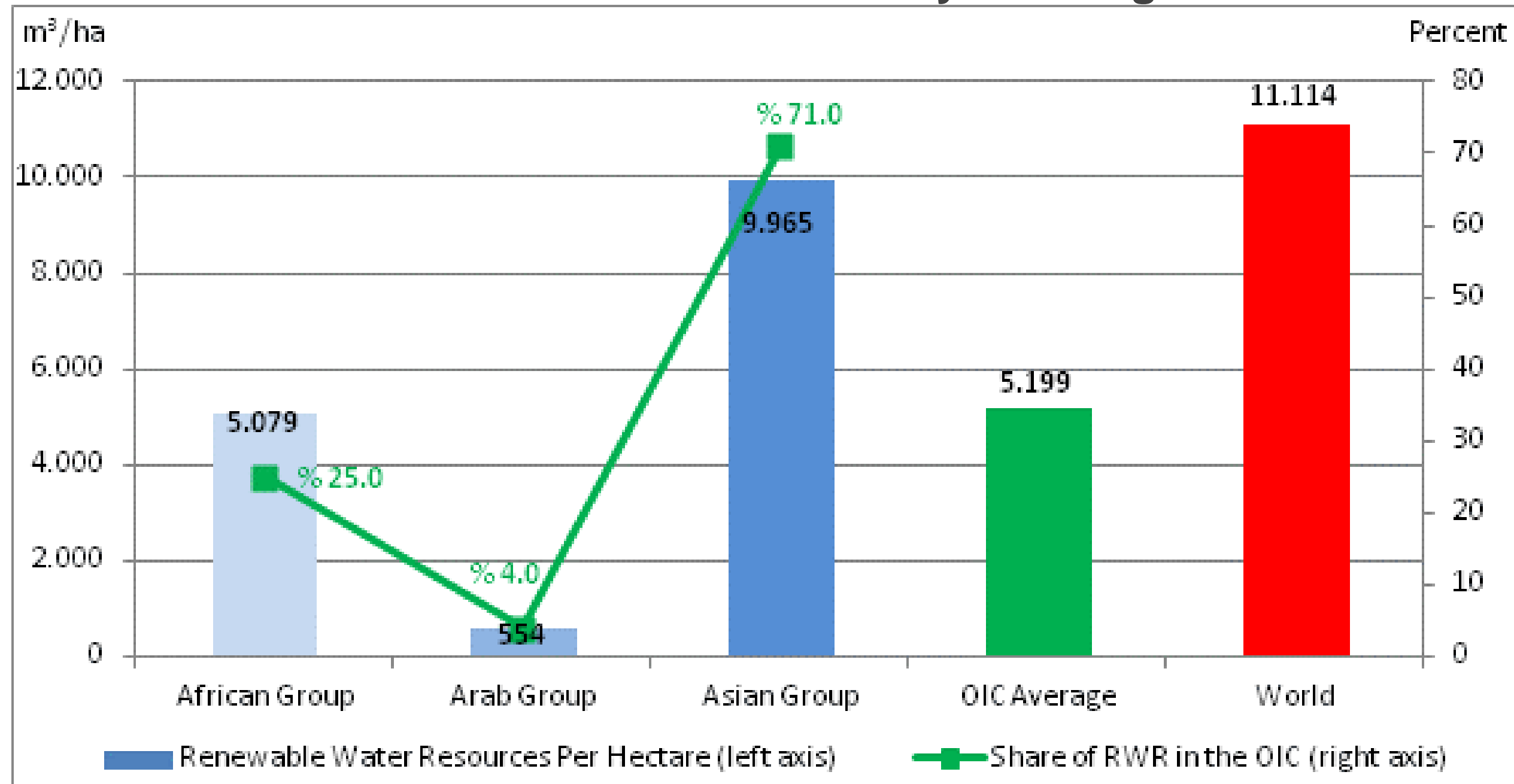
Fertilizer Use in the OIC and the World



2. Sectoral Indicators

➤ Agricultural Productivity

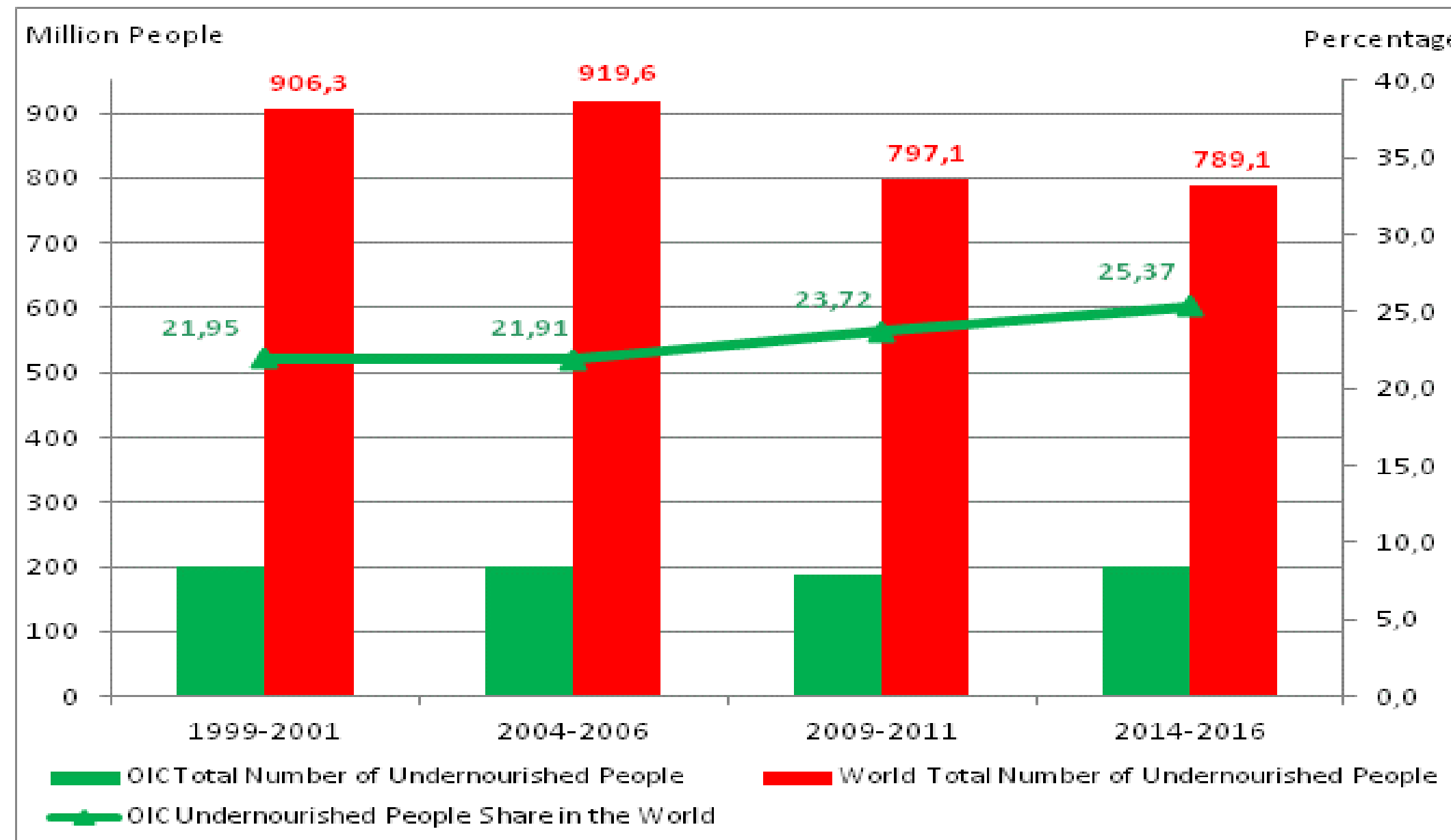
Renewable Water Potential in the OIC by Sub-Regions



3. The State of Food Insecurity

➤ Undernourishment

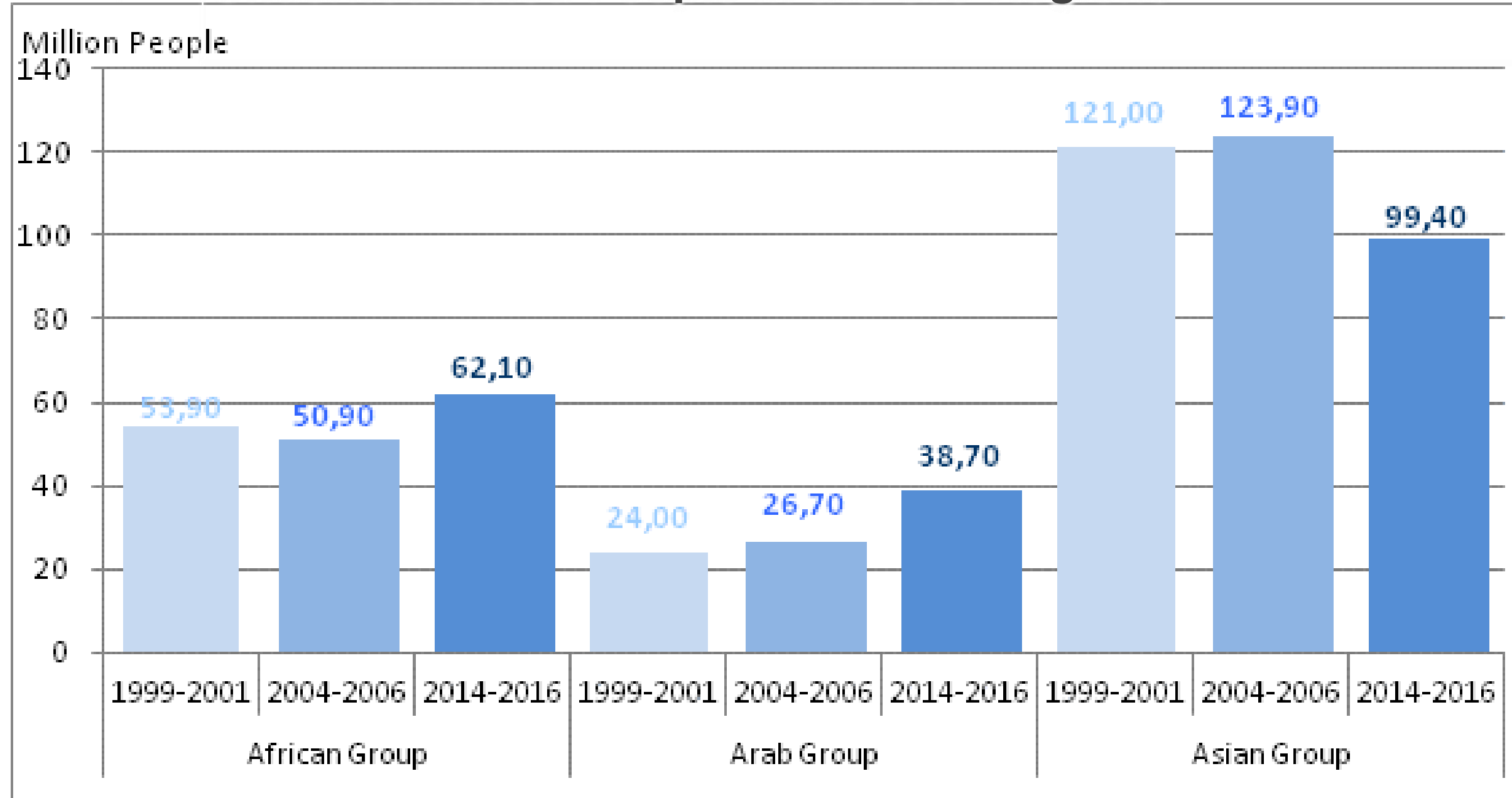
Undernourished People in the OIC and its Share in the World

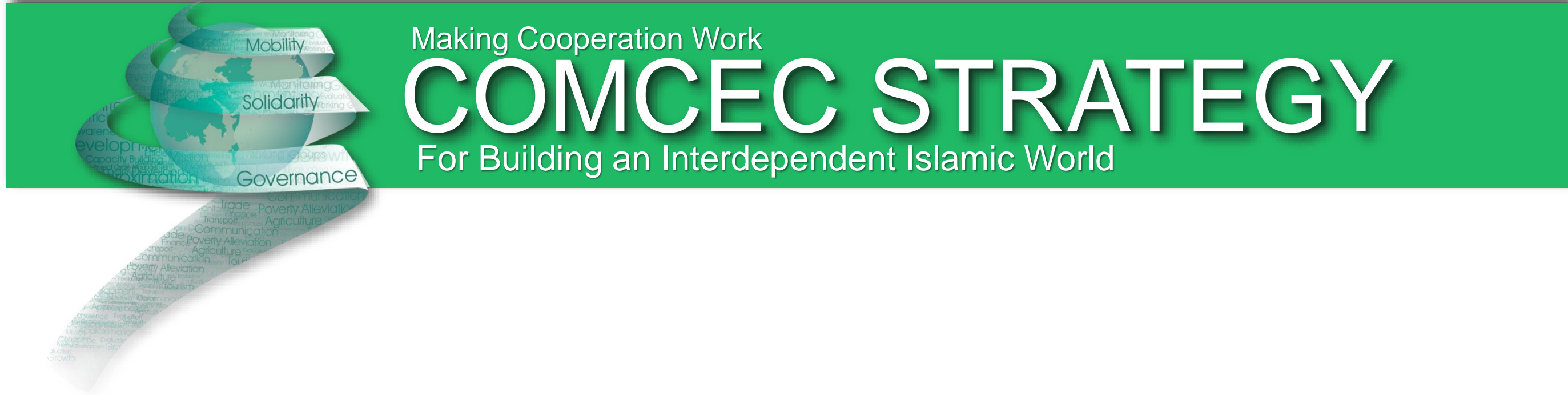


Due to data availability, 25/57 OIC Member Countries are included.

3. The State of Food Insecurity

Undernourished People in the OIC Regions





Thank You...



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