



**Standing Committee
for Economic and Commercial Cooperation
of the Organization of Islamic Cooperation (COMCEC)**

COMCEC

Proceedings of the 6th Meeting of the COMCEC Agriculture Working Group

“PROMOTING AGRICULTURAL VALUE CHAINS IN THE OIC MEMBER COUNTRIES”



**COMCEC COORDINATION OFFICE
October 2015**



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**PROCEEDINGS OF THE 6TH MEETING OF THE
COMCEC AGRICULTURE WORKING GROUP
ON**

**“PROMOTING AGRICULTURAL VALUE CHAINS
IN THE OIC MEMBER COUNTRIES”**

(October 8th, 2015, Ankara, Turkey)

COMCEC COORDINATION OFFICE

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Introduction

The 6th Meeting of the COMCEC Agriculture Working Group was held on October 8th, 2015 in Ankara, Turkey with the theme of “Promoting Agricultural Value Chains in the Member Countries.” The Meeting was attended by the representatives of 10 Member States, which have notified their focal points for the Agriculture Working Group namely, Bangladesh Gambia, Indonesia, Iran, Jordan, Pakistan, Palestine, Qatar, Saudi Arabia, and Turkey. Representatives of COMCEC Coordination Office, SESRIC, UNIDO and SÜTAŞ Group and Royal Tropical Institute (KIT) have also attended the Meeting.¹

At the outset, the representative of the COMCEC Coordination Office informed the participants about the agriculture outlook of the Member Countries. It was followed by the presentation made by the Royal Tropical Institute (KIT) representative on overview of the global agricultural value chains and success stories in changing value chains.

The participants considered agricultural value chains of the Member Countries through focusing on the Analytical Study titled “Promoting Agricultural Value Chains in the Member Countries” commissioned by the COMCEC Coordination Office specifically for the Meeting with a view to enriching the discussions.

The Representatives of the Member States have shared their experiences, achievements and challenges regarding agricultural value chains in their respective countries. Multilateral efforts and private sector experiences were also reflected to the discussions. The participants had the chance to discuss the policy options for enhancing the cooperation in this important field. The Room Document based on the findings of the Analytical Study submitted to the Agriculture Working Group Meeting and the answers of the Member Countries to the policy questions sent to the Member States by the COMCEC Coordination Office were the main inputs for the discussions during moderation session.

Lastly, the COMCEC Coordination Office presented the COMCEC Project Funding Mechanism, introduced by the COMCEC Strategy, and informed the participants of its details.

¹ The list of participants is attached as Annex 4.

1. Opening Session

In line with the tradition of the Organization of the Islamic Cooperation (OIC), the Meeting started with the recitation from the Holy Quran. At the outset, Mr. M. Metin EKER, Director General of the COMCEC Coordination Office introduced the COMCEC and its activities briefly.

Mr. EKER stated that COMCEC has been the Ministerial level decision making body within the OIC family. COMCEC annually brings together the Ministers of Economy, Trade, Development and Finance with a quite rich agenda ranging from trade, transport, tourism, agriculture to poverty alleviation and financial cooperation. He pointed out that Agriculture Working Group Meeting is also a preparation for the Ministerial Meeting and its outputs would be submitted to the Ministers for their deliberations.

Mr. EKER highlighted that importance of agriculture has been well-addressed in many COMCEC Meetings. Agriculture sector occupies a central place in the economies of the many Member Countries with its contribution to the total GDP by 10.1 per cent. For this reason, agricultural value chain development has particular importance for farmers and agribusiness entrepreneurs to add value to agricultural products from production and processing to marketing. However, as articulated by the Analytical Study, there are some dimensions, such as institutional framework and public policies, standards, infrastructure and logistics, governance and value chain actors, and trade, to be considered for promoting agricultural value chains in the Member Countries. Mr. EKER concluded his words by introducing the program and by expressing his wishes for successful deliberations.

Dr. HARJITO, Deputy Director for Regional Cooperation from the Ministry of Agriculture of Indonesia was elected as the Chairman of the Meeting. Dr. HARJITO introduced himself and thanked all the participants for electing him as the Chairman of the Meeting.

2. The COMCEC Agriculture Outlook 2015

Mr. Erdoan Emrah HATUNOLU, Expert from the COMCEC Coordination Office, has presented some of the key developments of agriculture sector in the world and in the OIC Member Countries. In his presentation, Mr. HATUNOLU provided an overview of agriculture sector in the world and in the Member Countries.

At the outset, Mr. HATUNOLU presented the macro agricultural indicators; agricultural value added, growth rates, population, employment and trade; for demonstrating the overall picture of agriculture sector in the OIC Member Countries.

Regarding agricultural value added, Mr. HATUNOLU stated that there is an increasing trend in the share of OIC agricultural production in the world agricultural production. Accordingly, whereas OIC agricultural GDP was 192 billion US Dollars with a share of 15 percent in the world's agricultural production in 1990; in 2013, OIC agricultural GDP reached to 677 billion US Dollars with a share of 21 percent. In sub-regional level, Asian group has the highest share with 55.6 percent followed by African group with 23 percent and Arab group with 21.4 percent in 2013. However, the share of agriculture sector in the OIC economy decreased from 16.6 percent in 1990 to 10.1 percent in 2013, which is still two times higher than the share of agriculture sector in world's total GDP.

Mr. HATUNOGLU also gave information about agricultural growth and economic growth in the OIC and world for the last two decades and in the long-run, 1993-2013. Accordingly, the average yearly agricultural growth in ten years period in the OIC increased from 3.4 percent in 1993-2003 to 3.6 percent in 2003-2013. Although average yearly agricultural growth in the OIC was higher than the world's agricultural growth in both decades, it lagged behind the OIC economic growth. In the long term, OIC's both agricultural growth and economic growth surpassed the world, and realized as 3.5 percent and 4.3 percent during the period of 1993-2013, respectively.

Regarding agricultural population, Mr. HATUNOGLU stated that agricultural population of the OIC Member Countries was 492 million people in 1990 with 47.7 percent share in total population. Although it increased to almost 568 million people, agricultural population constituted 35.1 percent of the total OIC population in recent years.

He also showed the slides illustrate the developments in agricultural and total employment in the OIC Member Countries. In 1990, OIC agriculture sector employed almost 182 million people, where total employment was 344 million. In 2013, the number of people employed in agriculture sector reached to 240 million people. In the same year, total employment in the OIC Member Countries realized as nearly 670 million people. Moreover, the share of agriculture sector in total employment was 52 percent in 1990, 44 percent in 2000, and 36 percent in 2013. He stated that even though the number of agricultural employment is getting higher, the proportion employed in agriculture sector is decreasing over time.

Regarding trade performance, total agricultural trade in the OIC Member Countries grew by more than 5 times from 1990 to 2012 and reached 340 billion US Dollars. Total agricultural commodity import of the OIC Member Countries reached to 208 billion US Dollars from 35 billion US Dollars in 1990. Correspondingly, total agricultural commodity export of OIC was as 133 billion US Dollars in 2012, where it was 20 billion US Dollars in 1990. However, most of the OIC Member Countries have a trade deficit in agriculture sector. It means that the agricultural commodity imports exceed their exports, and it creates an outflow of domestic currency to foreign markets.

In the second part, Mr. HATUNOGLU gave information on the sectoral indicators such as land use, crop production and agricultural productivity. With its 3.2 billion hectares total land area, OIC total land area is equal to 24 percent of the world. Almost 1.4 billion hectares, representing 44 percent of this total land, is used as Agricultural Area. Moreover, 297 million hectares are arable land, 63 million hectares are reserved for permanent crops, and more than 1 billion hectares are used as permanent meadows and pastures.

Regarding crop production, OIC Member Countries have a wide range of crop and livestock production system thanks to different agro-ecological zone, agricultural infrastructure, and producing and consuming habit.

Regarding agricultural productivity, which is measured by the ratio of agricultural output values to agricultural inputs, land and labor productivity in agriculture sector was demonstrated. Accordingly, average agricultural land productivity of OIC Member Countries reached to 2,235 US dollars/ha, where it was 743 US dollars/ha in 1995. The second productivity indicator is the labor productivity which is measured by the ratio of total agricultural value added to the number of agricultural worker. Average labor productivity of OIC Member Countries is higher than the world average in all examined years. In 2013, average agricultural labor productivity of OIC Member Countries reached to 2,819 US dollars/person; while it was 2,453 US dollars/person for the world average in 1995(year?).

In the last part, Mr. HATUNOGLU presented the state of food insecurity, specifically state of undernourishment in the Member Countries. According to FAO definition, undernourishment means that a person is not able to acquire enough food to meet the daily minimum dietary energy requirements, over a period of one year. According to FAOSTAT, it is seen that, as of 2014-2016 period, 168.6 million people are expected to be undernourished in the OIC Member Countries which accounts for the 21.2 percent of undernourished people in the world.

While the number of undernourished people in the world has fallen gradually in the last 25 years, it remains almost the same in the OIC Member Countries. Therefore, the share of OIC undernourished people in the world has risen from 16.6 percent in 1990-1992 to 21.2 percent.

3. Overview of the Global Agricultural Value Chains and Success Stories in Changing Value Chains

Mr. Bart SLOB from the Royal Tropical Institute (KIT) made two presentations. The first focused on trends in global agricultural value chains and success stories in transforming value chains. The second was on agricultural value chain development in the OIC member countries. The latter also contains recommendations for the member countries.

Both presentations were based on the findings of the analytical study on “Promoting agricultural value chains in the OIC member countries”, prepared for the 6th Meeting of the COMCEC Agriculture Working Group. This study analyses how OIC Member Countries promote and develop agricultural value chains. In the study, five aspects of value chain development have been analyzed: (1) the institutional framework and public policies, (2) standards, (3) infrastructure and logistics, (4) governance and value chain actors, and (5) trade.

In his first presentation, after explaining the methodology used for the study, Mr. Slob highlighted seven global trends that influence and inform agricultural value chain development: (1) the need for increased agricultural outputs to feed the world, (2) shifting governance structures and changing roles of the public and private sectors, (3) geographical shifts and the growing importance of emerging economies, (4) new consumption patterns and consumer demands shaping value chains, (5) corporate social responsibility and sustainability standards, (6) agricultural innovation and biotechnology, and (7) innovation in ICT to support value chain development.

He also talked about several success stories in value chain development, such as the top sector policy in the Netherlands, Ethiopia's flower sector, the UK's Red Tractor scheme and the popularity of ready meals.

In the first success story, Mr. SLOB talked about the “Top Sector Policy in Netherlands.” He stated that the government prepared a policy framework to support key economic areas and to enhance competitive strength in the global agricultural market. Among others, the government supported agriculture and food, horticultural and propagating stock and seven other sectors with combination of generic financial instruments and emphasis on cooperation. The government formed consortia which includes private sector initiatives, academia, civil society organizations and government mandate this consortia to make necessary decisions.

The second success story was about Ethiopia's flower sector. Mr SLOB pointed out that although there was no flower sector ten years ago, Ethiopia is now the 2nd largest flower exporter after Kenya. In 2002, “Ethiopian Horticulture Producers and Exporters Association (EHPEA)” was established and in 2007, EHPEA developed five year action plan. They also collaborate with the private sector from Belgium and Netherlands. Government also invested in infrastructure. As a result, more than 100.000 jobs created in Ethiopia's flower industry.

In the third success story, Mr. SLOB explained the “Red Tractor Scheme in the UK” as an example of private sector standards. Since the fear of animal diseases in 1990s, there was an

intensification of food safety and animal welfare regulations in these years. Therefore, an independent agency called Food Standards Agency was established to enforce food standard regulations. In 2000, specific British Farm Standards launched to offer full traceability so that people could exactly know which farm certain products come from. This standard has been successful with strong market recognition of 64 percent among UK consumers.

At the end of his presentation, Mr. SLOB presented "The Rise of Ready Meals in the UK" for demonstrating an example of changing consumer demands. Accordingly, since the changing demographics, busy lifestyles and time scarcity, frozen meals became popular in 1960 and 1970s. Marks & Spencer introduced first chilled ready meal in 1979. The ready meal sector is worth £ 10 billion per annum with 13 percent of food retail market.

4. Status of the Agricultural Value Chains in the OIC Member Countries and Recommendations for the Member Countries

In the second presentation, Mr. SLOB explained that agricultural policies are highly heterogeneous amongst the OIC Member Countries. Yet, there is a broadly shared focus on ensuring food self-sufficiency, with a view to shielding populations against the vulnerabilities of external sources. For most agricultural products in the OIC Member Countries, value chains remain overwhelmingly local and do not extend to international markets.

For the study on “Promoting agricultural value chains in the OIC member countries”, six case studies have been carried out namely: (1) the date sector in Saudi Arabia, (2) the dairy sector in Egypt, (3) the red meat sector in Turkey, (4) the groundnut sector in the Gambia, (5) the palm oil sector in Malaysia, and (6) the cotton sector in Pakistan.

According to Mr. SLOB, the overall integration of OIC Member Countries into global agricultural value chains is still underdeveloped. Constraints for global agricultural value chain development are numerous, ranging from natural resource constraints, lack of technology and challenges associated with smallholder-dominated agriculture, to poor infrastructure and logistical barriers, and weak institutional environments. A low level of intra-regional trade among OIC countries also highlights the absence of strong regional integration and economic development.

Mr. SLOB stated that one of the main problems for the promotion of agricultural value chains in OIC countries is the lack of standards for food safety and quality or low levels of compliance with standards. The lack of standards starts at the input level and carries on through production, post-harvest management, storage and transport, processing and manufacturing.

Mr. SLOB expressed that many OIC Member Countries have relatively weak infrastructural environments for agriculture. Problems occur at different levels, including weak research and development, deficient quality control systems, lack of transport and storage capacities, and inefficient processing operations.

Infrastructural development seems particularly important with regard to agro-processing for increased value capture. Currently, many processing facilities in OIC countries need to be upgraded to improve efficiency or operate well under capacity due to the lack of sufficient produce meeting the quality requirements in order to be processed.

While the dominance of smallholder farmers and the resulting co-existence of informal and formal value chains characterize most OIC Member Countries, different degrees of activity and different types of policies can be observed to promote the inclusion of small-scale farmers into formal value chains. Some countries do not appear to have a specific policy on smallholders, whereas others pursue one or more of four main policy mechanisms to integrate smallholder farmers into formal value chains: (1) integrated co-development of smallholder farmers and commercial agriculture by establishing institutionalized linkages between the two; (2) producer organization to reduce the number of chain actors and facilitate access to formal markets for small-scale farmers; (3) public-private partnerships to foster smallholder

integration, for instance with donor agencies or large multinational companies; and (4) donor or NGO programs to assist farmers in linking to formal value chains.

Mr. SLOB stated that exports of agricultural products from OIC Member Countries have increased tremendously from 2002 (US\$ 33.8 billion) to 2012 (US\$ 132.7 billion). Asian OIC countries are the top exporters, with 75 percent, followed by the Arab countries, with 15 percent. The biggest exporters of agricultural products are Indonesia, Malaysia and Turkey (all net exporters). These countries together account for 63 percent of the OIC's total agricultural commodity exports.

Trade costs among OIC Member Countries are lower than trade costs between OIC and other developing countries, but significantly higher than trade costs between OIC and developed countries. There is a clear political drive towards increased intra-OIC trade among the 57 Member Countries which has risen from 15 percent in 2005 to 18.6 percent in 2013, and is set to rise to 20 percent by 2015 according to OIC's Ten-Year Programme of Action. Agricultural products constitute 3.2 percent of total intra-OIC trade.

Mr. SLOB concluded his second presentation with a set of recommendations to develop agricultural value chains in the OIC Member Countries. The recommendations were grouped according to the five aspects mentioned earlier:

Institutional framework and public policies

- Increase political commitment and public policies
- Improve agricultural output and sustainability
- Use better crop varieties with more value added
- Use crop varieties suited to local conditions
- Develop processing industries

Standards

- Adopt quality standards and implement quality control
- Identify market opportunities for standard compliance
- Work towards more transparency and traceability
- Collaborate with relevant standardization efforts

Infrastructure and logistics

- Close the infrastructure gap
- Promote public-private partnerships for infrastructure development
- Organize chain supporters

Governance and value chain actors

- Develop smallholder agriculture
- Link formal and informal value chains for the benefit of both

Trade

- Facilitate trade
- Pursue regional integration

Question(s) and Answer(s)

Question: How do you evaluate impact of the problems about irrigation and water scarcity on agricultural value chains? And what are your suggestions to overcome these kinds of problems?

Answer: We saw water scarcity problems in the countries like Saudi Arabia and we suggest such countries to shift their products to agricultural crops that demand less water. Of course, these policy measures can be taken in the countries which have government-driven agriculture sector.

Question: How do you measure the value-added created by global value chains? There are many qualitative analyses in the analytical study, but there is not much statistical elaboration on the value chain. What are the challenges to come up with empirical data and statistics to make a quantitative analysis to measure the status of the OIC Member Countries in global value chains?

Answer: When we talk about the global agricultural value chains, we actually talk about the transformation. Something starts as an agricultural product, but at the end it is not agricultural product anymore. For example, cotton is an agricultural product but when we produce cloth, it is not agricultural product anymore. Because of this transformation, it is very hard to measure how much it contributes to the economy because it involves several sectors in the economy.

Question: In the agricultural value chains studied in the analytical reports' case study section, which value chain actors capture more or less value than it deserves with respect to their efforts?

Answer: The unanimous answer for this question is that the smallholder farmers deserve more because they do large part of the work but they do not earn enough. Unfortunately, markets generally do not pay people what they deserve. Governments can set certain minimum standards to fix this problem. However, too much government intervention also has adverse effects on the agricultural markets.

5. Policy Options for Promoting Agricultural Value Chains in the Member Countries

The session was moderated by Mr. Nevzat BİRİŞİK, Deputy Director General from the Ministry of Food, Agriculture and Livestock of the Republic of Turkey. At the outset, Mr. BİRİŞİK stated that “the Room Document for the Moderation Session of the 6th Meeting of the Agriculture Working Group”, prepared by the COMCEC Coordination Office in light of the findings of the analytical study prepared specifically for the Meeting and the answers of the Member Countries to the policy questions which have already been sent by the CCO, would serve as the basis for the discussions in the moderation session.

At the beginning of the session, Mr. Mustafa Adil SAYAR, Expert from the COMCEC Coordination Office, made a brief presentation on the responses of the Member Countries to the policy questions on agricultural value chains sent to the Agriculture Working Group focal points by the CCO. In his presentation, Mr. SAYAR gave a brief information on the policy questions. He stated that the purpose behind these policy questions was to strengthen policy dimension in the discussions of the Agriculture Working Group. After presenting the questions and responses of the Member Countries, he introduced the draft policy advices included in the Room Document.

After the presentation, Mr. BİRİŞİK gave the floor to all delegations asking their opinions and comments for each policy advices as well as the experience of their respective countries in this regard. The participants agreed on the policy advices given in the room document. Based on intensive deliberations, CCO drafted attached document² reflecting the main points of agreement by the delegations to be submitted to the 31st Session of the COMCEC as an outcome of the 6th Meeting of the Agriculture Working Group.

The policy recommendations highlighted by the participants are as follows:

- Adopting/developing quality standards and implementing quality control, and identifying market opportunities for standard compliance of agricultural products.
- Improving transport and storage facilities for promoting value chain development in the Member Countries through well-developed public-private partnerships.
- Supporting agro-processing and packaging industries to increase value added of agricultural products.

² The policy recommendations document is attached as Annex 3.

6. Member State Presentations

6.1. Iran

Dr. KAZEMNIJAD the Director General of Economic Affairs of Jihad Agricultural Ministry of Iran made a presentation on promoting agricultural value chains and Iran's experience and good practices. Dr. KAZEMNIJAD expressed that agricultural jobs are the important economic business in the world and Islamic countries. They basically give gift political, economic and social security to countries. He argued that, as it's obvious, the agriculture occupies are very important from view point of value added creation. Therefore, it's necessary to develop value chain management. He stated that there are value added 10% and employee %18 In IRAN's Agriculture Economic.

Dr. KAZEMNIJAD pointed out that value chain management views the flow up from the consumer to the source. He added that value chain management also concerns with the flow of production, but it has a different view than supply chain management. He underlined that Fundamental activities of value chain management are human resource, marketing, production, logistic and Agribusiness.

Dr. KAZEMNIJAD noted that Agriculture Value Chains (AVCs) are the sequence of steps from production through delivery of a product to the consumer, which include feedback between the participants in the chains to create efficiencies and to provide more desirable and better quality products. AVCs will offer opportunities at each link for increasing productivity, reducing waste and loss, providing economic and social benefits, and protecting the environment and natural resources.

Dr. KAZEMNIJAD shared IRAN's experience about value chain analyses in Poultry meat supply. He touched upon that there are some means for poultry industry in the favorable business environment as follows:

- Creation of efficient structure
- The Improving economic indicators (Feed Conversion Ratio, losses, etc.)
- Export production and increase competitiveness, Use of new technologies and more efficient production and efficient professionals entrance to the production of poultry meat
- Capital and management support to small farms and help farmers to increase income
- Increasing productivity.

He highlighted that according to findings, there are some requirements for the reform of business environment:

- Recognition of integrated production structure
- Issuing licenses to companies which have integrated production chain

He stated the followings as the necessary reforms in laws and regulations:

- Focusing decisions poultry industry ,
- Complete the rules and regulations payment facilities based on the new structure
- Tariff and tax reform based on the product

- Complete rules and regulations on health monitoring production and supply of poultry meat
- Solving obstacles and difficulties relate to partnership contract in the different rings of chain companies

At the final part of his presentation, Dr. KAZEMNIJAD shared Iranian good Practices on strategies for developing value chain. He stated that in the article of (no.145) Fifth Five Year Socio Economic and Cultural development Plan of Islamic Republic of Iran some activities are determined for enhancing economic and competitive of production and increasing export of agricultural commodities, reorganizing resource management, protection of base resources and value addition and completion of *value chain* of agricultural products. He informed the participants on one of the article (article 31) of Law of Increasing Productivity of Agricultural sector and Natural Resources.

6.2. Palestine

Mr. Samer ALTEETI, Director of Policies and Planning at the Ministry of Agriculture of Palestine made a presentation on “the role of olive oil in agricultural value chain in Palestine.”

He informed the participants that olives constitute 54 percent of the total arable area and comprising 85 percent of the total fruits trees area in Palestine. Around 66,000 are the rain fed olive holdings while around 11000 are irrigated holdings. After mentioning the volume of the olive in agriculture sector of Palestine, Mr. ALTEETI stressed that the value chain of the olives was analyzed through a study prepared by Horizon for Sustainable Development in 2007. Furthermore, in order to analyze the value chain in olive sector, another study entitled the Road Map for Agribusiness Development in Palestine conducted by the DAI in cooperation with Techno-Serve, Oxfam and Horizon.

He states that there are 11 local olive oil companies and their storage capacity is around the 2500 tones. He underlined that most of the olive oil produced is channeled to the local markets. Considering the importance of small farmers in the agriculture market Mr. ALTEETI highlighted the following issues;

- Tools and requirements needed to improve and maximize share of small farmers from the market.
- Establishing/expanding coverage of cooperatives and farmer organization is crucial.
- There is a need to provide training in orchard rehabilitation, and farm monitoring and evaluation.
- Providing basic services such as micro-finance and incentives.
- Delivering agricultural extension and marketing services.
- Supporting the needed inputs and infrastructure to improve quality of olive oil.

6.3. Turkey

Dr. Melik AYTAÇ, representative of the General Directorate of Agricultural Reform of the Ministry of Food, Agriculture and Livestock of the Republic of Turkey made a presentation on “Promoting Agricultural Value Chains in Turkish Agriculture.” In his presentation, Dr. AYTAÇ

briefly informed the participants about the agriculture sector in Turkey and presented the typical value chains in Turkey.

At the outset, Dr. AYTAÇ stated that Turkey is the world's top producer in hazelnuts, apricots and among the first five produces in melon, water melon, strawberry, fig, lentil, olive, apple, tomatoes, tea, pistachio, nut, walnut, aubergine, sheep milk, sugar beet and honey. In terms of exports, Turkey is the top exporter in hazelnuts, apricots, grapes figs, quince and among the first five in wheat flour, cherry, yogurt, macaroni, lentil, lemon, mandarin, chickpea, orange, olive and tomatoes. In this regard, having an agricultural GDP of 150 billion USD and agricultural exports of 40 billion USD, Turkey's Agricultural vision is to be among the top 5 countries in the world in terms of agriculture economy.

He argued that value chain is basically a systematic approach examining the development of the competitive advantage. Hence different models are used as a tool for determining competencies and identifying operations that create competitive advantages. The competitive advantage stems from various operations that are utilized by the institution such as design, manufacturing, marketing, delivery and product support services. Value Chain Analysis, furthermore, is the detailed study of the interconnected set of activities starting from raw materials (or most of the time from idea and design) to delivery of the final product (including recycling) to customers through distributing channels.

Dr. AYTAÇ, in this framework, stated that Turkey has been utilizing different mechanism for increasing the value added generated in agriculture such as supporting farmer organizations, education and extension supports (Certified agriculture advisory), rural development support (50% grant to processing and storage facilities), licensed storage, etc. Highlighting the important role of producer organizations for the agricultural value chain, he mentioned that the producer organizations in the agricultural sector need to be developed and financially strengthened for value chain in OIC countries. In this connection there is a need for;

- Sharing of information and experience between producer organizations on technical training and expert exchange (designed to transfer experiences)
- Cooperating with producer organizations, that are able to invest in production, processing and storage of agricultural products, and their counterparts in OIC Countries on renting of land and joint investments
- Establishing joint brands that will allow for opening up to global markets
- Jointly organizing trade fairs and exhibitions or attending globally acclaimed major activities with joint stands

Mr. AYTAÇ concluded his presentation by emphasizing the importance of branding through producer organizations which bring together small holders family farmers for creating more added value. Producer organization having storage/cold storage, packaging unit and a processing unit together with its own brand, they will be able to market their products directly without a need for an intermediary. He also emphasized that government should support producer organizations for their logistics costs in order for them to be active in the market.

7. Multilateral Efforts / Private Sector Initiatives for Agricultural Value Chain Development

7.1. UNIDO- “Agro-Industrial Value Chain Development: Where and How to Create Value”

Mr. Frank HARTWICH and Mr. Bassel ALKHATIB, Industrial Development Officers, from the UNIDO, made a presentation on the Agro-Industrial Value Chain Development. Firstly Mr. HARTWICH informed the participants on the structural changes and the role of global value chains with a special reference to the agricultural value chains, and value chain centered development. Mr. ALKHATIB briefed the participants on good practices in value-chain centered agricultural development.

Mr. HARTWICH argued that not only three main sectors which are primary sector, manufacturing and services but also sub-sectors/industries in each of these sectors should be analyzed very well. He stated that the composition of these sectors changes over time and in line with the country's moves in the development leaders. The composition of this kind of industries change. Therefore there is a need to adopt new strategies in line with the countries' priorities in the agricultural development. He claimed that in order to understand the real volume of agricultural value chain, the food and beverages sectors should be analyzed. The real value added in food and beverages in the OIC Countries is not at the desired levels in comparison to the non-OIC countries' performance. However, there is possibility for OIC Countries to reach the world average. For instance, Member Countries like Malaysia and Cameroon use their resources efficiently. However, most of OIC Member Countries are below the world average.

Mr. HARTWICH stated that countries think there is a need to protect the agricultural sector, yet there is harsh environment out-there. It is particularly related to the factor that underdeveloped industries are not able to compete under the free market conditions in presence of first developers. This is partly relevant in presence of global value chain dynamics, namely, increasing specialization, increasing concentration of production and trade, increasing volume of commodity trade, increasing engagement of consumers and new information and communication technologies. In this connection he briefed the participants that UNIDO argues that protectionism does not work anymore. There are other issues which should be taken into consideration. In this respect, there are two types of value chain, buyer-driven value chain and supplier-driven value chain. For example in buyer-driven value chain, a country has a value chain where a primary producer have certain connections to certain processors and only these processors can sell the products to international retailer. If this country bare this kind of linkages it basically not in the value chain anymore. The other case is supplier-driven value chain, the primary producers have certain linkages to the suppliers who provides them technologies and seed materials.

Mr. HARTWICH stated that the main thing is to understand whether the actors are primary producers, processors or marketers. Usually it is other actors in another segment of global value chain which helps you to innovate, that means somebody that buying your product is the one who deciding the type of product that you have to produce. That contains both advantages and disadvantages and it is needed to be understood well. If a country does not engage in value chain development innovations it means that this country's supplier will not necessarily get more profit due to exclusion from value chains, country's supplier may be pushed down due to world market shocks, the global players having links, technology and skills will continue to capture value chains, and many sectors/countries in developing countries will not be able to enter the global value chains. In this framework, most of actors are aware of the issue and most countries have policies that focus on value chain development. However, there are some missing dimensions in common practices. These dimensions, among others, are;

- Trade is not the focus of value chain policy measures,
- Many countries focus on the organizational issues, clusters and upgrading,
- Lack of understanding of value chain dynamics and options for insertion into global value, and
- Wrong assumptions on competitiveness and impact.

He underlined that to be able to involve in the global value chains, there are seven dimensions that should be taken into consideration. Otherwise, if a country takes into account only two of these dimensions, this country may have a program that will not help it to get more profit from the global agricultural value chain. Mr. HARTWICH lastly pointed out that the policy instruments for value chain development that UNIDO utilize to help the Member Countries to increase their benefit from the global value chain are regulation, tariff and taxation, economic incentives, learning and information and organizational support.

The second part of the presentation was made by Mr. Bassel ALKHATIB. In his presentation Mr. ALKHATIB stated that in order to design a value chain support program a country should have national priorities. UNIDO always work in accordance with the priorities of the governments. It helps countries in identifying about which value chains they should work upon. In this respect, it conducts technical and financial feasibility studies on different level of the value chains and follow an integrated approach at the all levels. He argued that there are overlapping of the programs which cause the loss of resources. Because everybody is working on everything, there should be a good definition and collaboration on who should work on what in order to have a complementary program in agricultural value chain.

He informed the participants about two of the projects that UNIDO has been successfully conducted in the field of agricultural value chain in Guinea and Nigeria and Cameroon respectively. After mentioning the details of these two projects Mr. ALKHATIB briefed the participants that the areas value-chain programs should focus on are as follows:

- More substantial profit generation for local firms,
- Avoid locking development country supplier in technology trajectories
- Cluster development not only in the industrial parks

- Support to quality control and standards compliance infrastructure

He lastly underlined that there is a need to increase efforts towards making industrial policies compliant with the global value chain, and focus on inclusive and sustainable industrial development.

7.2. SÜTAŞ GROUP- “Sütaş's Value Chain and its Contribution to Dairy Value Chain”

Ms. Fatma CAN SAĞLIK, Coordinator at the SÜTAŞ made a presentation on “SÜTAŞ's Value Chain and its Contribution to Dairy Value Chain”. At the outset Ms. SAĞLIK stated that Turkey is ranked among the top ten dairy producers in the World and SÜTAŞ is the leader in the dairy sector in Turkey. She mentioned that despite the fact that it is a profit making company, SÜTAŞ pays special attention to sustainable development and operate with the principle of from farm to the table.

She stressed that SÜTAŞ has three facilities operating in Bursa, Aksaray and Büyükkırıkkale. It has a group of companies namely TARFAŞ, SÜTAŞ and EMFAŞ. TARFAŞ is dealing with agricultural activities like dairy production, feed production and training farmers. SÜTAŞ is responsible for distributional network and processing facilities and EMFAŞ is producing energy from biogas and supplies its facilities with electricity. She informed the participants that SÜTAŞ is the leader in Turkish dairy market for 10 years. It has 1 billion dollar annual turnover and processing 700 million litres of milk and produces. It employs 5.000 employees, 28.000 milk producers, 1500 mono-distributors and distributors.

Ms. SAĞLIK stated that SÜTAŞ has its own farms and also working with many other farmers. The value chain starts with fodder crop and feed production and it continues with milk production. It conducts thousands of tests not only for raw milk but also for all kinds of inputs coming to the facilities. Then processing milk to 70 products and distributing and marketing these products. She further stressed that SÜTAŞ producing and buying high quality raw milk from its suppliers. It conducts hygiene, quality and conformity analysis at every stage of value chain. It also grows fodder plants and produces GMO free feed for its farms and its raw milk suppliers. Contract farming is also utilized by SÜTAŞ.

She stated that they ensure continuous training of its staff with the purpose of increasing the quality of its human resources. Investing in R&D and innovation in new products and packaging. Increasing producers' income and number of qualified dairy farmers and employees. SÜTAŞ has two cattle training center and applied farms. It collaborates with Uludağ and Aksaray Universities, Ministry of Food Agriculture and Livestock of Turkey and Kold Collage from Denmark. It also provides free of charge training of dairy farmers and gives consultancy services.

Ms. SAĞLIK underlined that with a view to increasing the number of qualified staff for dairy sectors, SÜTAŞ cooperates with three universities in Turkey. Furthermore, SÜTAŞ conducts

skill-building programs for students from Karacabey and Aksaray Vocational Training Schools (VTSs) in dairy technologies laboratory, veterinary medicine and livestock raising, feed technology and animal feeding programs through training and internship opportunities in SÜTAŞ's premises. It also provides scholarships to the students of cooperating VTSs like Kold Collage internship program and SÜTAŞ's Vocational Training Scholarship. Furthermore, it provides employment opportunities for students graduated from cooperating VTSs and Scholarships to University students.

Lastly, she expressed that with regard to adding value to agricultural production, SÜTAŞ;

- Arranges contract farming for high quality fodder crop and milk production
- Provide guidance through its highly qualified staff to its suppliers
- Supplies feed rations to farmers according to the requirements of dairy cattle
- Buys heifers from farmers, raises and inseminates them and sells pregnant heifers to its raw milk suppliers/adds to its own herd.
- Collects manure and farm waste from dairy farmers and convert it to electricity and compost.

8. Utilizing the COMCEC Project Funding

Mr. Hasan YENİGÜL, Expert at the COMCEC Coordination Office made a presentation on the COMCEC Project Funding introduced by the COMCEC Strategy.

First, Mr. YENİGÜL informed the participants about where the COMCEC Project Funding stands in the COMCEC Strategy. Mr. YENİGÜL underlined the basic qualifications of the COMCEC Project Funding as “simple and clearly defined procedures and financial framework”, and mentioned that CCO provided continuous support to the member countries during the all stages of the COMCEC Project Funding Mechanism.

After briefly explained the Project Cycle Management (PCM) concept, Mr. YENİGÜL highlighted the potential project owners. It was emphasized that relevant ministries and other public institutions of the Member Countries and the OIC Institutions operating in the field of economic and commercial cooperation could submit projects. He also underlined that member countries have to be registered to respective working group in order to submit their project proposals.

He continued his presentation by explaining the “Project Selection Criteria” namely, compliance with Strategy’s Principles, and targeting strategic objectives of the Strategy, focusing on output areas and pursuing multilateral cooperation among the OIC Member Countries. He mentioned that CCO had revised project selection criteria for third call for project proposals and regular participation of member countries and OIC institutions to relevant working group meeting had been added as a new criterion. Mr. YENİGÜL also emphasized that project proposals submitted by the member countries should be compliant with the sectoral themes for the third call stated in the Program Implementation Guidelines. Mr. YENİGÜL pointed out the importance of the multilateralism for project appraisal and stated that project proposals should focus on common problems of at least two member countries and also should offer joint solutions for these problems.

During the presentation, three key actors and their responsibilities under the COMCEC Project Funding were identified; Project Owner (Project Submission and Implementation); the CCO (Program Management) and the Intermediary Bank (Project Monitoring and Financing). Moreover, steps and roles of these key actors throughout the project application process were defined. Monitoring of projects was another issue explained in the presentation. Mr. YENİGÜL presented that the Bank would be mainly responsible for financial and technical monitoring of projects while the CCO would oversee the overall implementation of the PCM.

With respect to the financial framework, Mr. YENİGÜL emphasized that the funds are grant in nature and would be provided by the CCO. From the illustration of the indicative grant limits and co-finance rates for the COMCEC projects, it was seen that Member Countries could submit a project with a budget up to USD 250.000 with the condition that they have to cover at least ten percent of project total budget (cash or in kind). This amount would be USD 100.000 for the OIC Institutions and at least twenty five percent should be covered by the project owner.

Mr. YENİGÜL also gave information on 2015 Projects. He stated after the second call for project proposals made in September 2014, that member countries and OIC institutions had shown great interest to the second call and 62 project proposals were submitted by 20 member countries and 3 OIC institutions. He also stated that within the framework of the second call, four successful agriculture projects are being implemented under the COMCEC Project Funding in 2015. They were titled "Project for Support to the Agricultural Training Centers in Chad", "Improving the Income of Small and Medium Scale Farmers in OIC Member Countries through Integrated Farming System", "Good Agricultural Practices (GAP) for Greenhouse Vegetable Crops; Principles for Tropical Climate Areas", "The establishment of database, network connection and web pages of smallholders/family farmer's agricultural cooperatives between COMCEC member states", proposed respectively by Chad, Indonesia, Suriname and Turkey.

Mr. YENİGÜL shared brief information with participants regarding several changes made in the mechanism for the third call. He underlined that CCO had set up a new online project submission system and member countries could submit their project proposals easily by using this user-friendly system. He continued his presentation with demonstration of project proposal submission by using new online project submission system.

Lastly, Mr. YENİGÜL reminded participants that third call for project proposals was completed as of 31st September, 2015 and the CCO would declare the short-list in early November, 2015.

9. Closing Remarks

The Meeting ended with closing remarks of Mr. M. Metin EKER, Director General of the COMCEC Coordination Office (CCO). Mr. M. Metin EKER thanked all participants for their attendance and invaluable contributions. He stressed that the key outcomes of this meeting is the Policy Recommendations which contains a number of policy advices for the member countries. He stated that these recommendations will be submitted to the 31st COMCEC Ministerial Session as an output of the 6th Meeting of the Agriculture Working Group.

Moreover, Mr. EKER informed the participants that the 7th Meeting of the COMCEC Agriculture Working Group will be held on March 3rd, 2016 in Ankara with the theme of "Reducing On-Farm Food Losses in the OIC Member Countries". He stated that a research report will also be shared with the focal points and other participants at least one month before the meeting.

Annex 1: Agenda of the Meeting



6th MEETING OF THE COMCEC AGRICULTURE WORKING GROUP

(October 8th, 2015, Ankara)

“Promoting Agricultural Value Chains in the OIC Member Countries”

AGENDA

Opening Remarks

1. The COMCEC Agriculture Outlook 2015
2. Overview of the Global Agricultural Value Chains
3. Status of the Agricultural Value Chains in the OIC Member Countries
4. Policy Options for Promoting Agricultural Value Chains in the Member Countries
5. Member State Presentations
6. Multilateral Efforts / Private Sector Initiatives for Agricultural Value Chain Development
7. Utilizing the COMCEC Project Funding

Closing Remarks

Annex 2: Program of the Meeting



6th MEETING OF THE COMCEC AGRICULTURE WORKING GROUP (October 8th, 2015, Ankara)

“Promoting Agricultural Value Chains in the OIC Member Countries”

PROGRAMME

08.30-09.00	Registration
09.00-09.15	Opening Remarks
09.15-09.40	The COMCEC Agriculture Outlook 2015 <ul style="list-style-type: none">- <i>Presentation: Mr. E. Emrah HATUNOĞLU Expert COMCEC Coordination Office</i>
09.40-09.50	<ul style="list-style-type: none">- <i>Discussion</i>
09.50-10.20	Overview of the Global Agricultural Value Chains and Success Stories in Changing Value Chains <ul style="list-style-type: none">- <i>Presentation: Mr. Bart SLOB Advisor Royal Tropical Institute</i>
10.20-10.45	<ul style="list-style-type: none">- <i>Discussion</i>
10.45-11.00	Coffee Break
11.00-11.40	Status of the Agricultural Value Chains in the OIC Member Countries and Recommendations for the Member Countries <ul style="list-style-type: none">- <i>Presentation: Mr. Bart SLOB Advisor Royal Tropical Institute</i>
11.40-12.30	<ul style="list-style-type: none">- <i>Discussion</i>
12.30-14.00	Lunch

Policy Options for Promoting Agricultural Value Chains in the Member Countries

There will be a moderation session under this agenda item. The participants are expected to deliberate on the policy options/advises for promoting agricultural value chains in the Member Countries. The Room Document was prepared by the CCO, in light of the findings of the analytical study prepared specifically for the Meeting and the answers of the Member Countries to the policy questions which have already been sent by the CCO. This Document has been shared with the Agriculture Working Group focal points before the Meeting with a view to enriching the discussions during the Session and coming up with concrete policy advices for the policy approximation among the Member Countries in this important field. At the beginning of the session, CCO will make a short presentation introducing the responses of the Member Countries to the policy questions as well as the Room Document.

14.00-14.15

- *Presentation:* “*Responses of the Member Countries to the Policy Questions on Agricultural Value Chains*”
Mr. Mustafa Adil SAYAR
Expert
COMCEC Coordination Office

14.15-15.30

- *Policy Discussion*

15.30-15.45

Coffee Break

15.45-17.15

Member State Presentations

- *Presentation(s)*
- *Discussion*

17.15-17.50

Multilateral Efforts / Private Sector Initiatives for Agricultural Value Chain Development

- *Presentation:* *Mr. Bassel ALKHATIB*
Industrial Development Officer
UNIDO
- *Presentation:* *Ms. Fatma CAN SAĞLIK*
Coordinator
SÜTAŞ

17.50-18.00

- *Discussion*

18.00-18.20

Utilizing the COMCEC Project Funding

- *Presentation:* *Mr. Hasan YENİGÜL*
Expert
COMCEC Coordination Office
- *Discussion*

18.20-18.30

Closing Remarks

Annex 3: The Policy Recommendations

THE POLICY RECOMMENDATIONS HIGHLIGHTED BY THE 6TH MEETING OF THE COMCEC AGRICULTURE WORKING GROUP

The COMCEC Agriculture Working Group (AWG) has successfully held its 6th Meeting on October 8th, 2015 in Ankara, Turkey with the theme of "Promoting Agricultural Value Chains in the OIC Member Countries." During the Meeting, the participants made deliberations for policy approximation among the Member Countries regarding agricultural value chains. The Room Document, prepared in accordance with the main findings of the analytical study conducted specifically for the 6th Meeting of the COMCEC Agriculture Working Group titled "Promoting Agricultural Value Chains in the OIC Member Countries" and the answers of the Member Countries to the policy questions sent to the COMCEC Agriculture Working Group focal points by the COMCEC Coordination Office, was the main input for the discussions. During the Meeting, the participants agreed on the policy recommendations included in the Room Document. The existing document includes these policy recommendations highlighted during the Meeting.

The Member States of the AWG are kindly invited to communicate their observations on this document, if there are any, to the COMCEC Coordination Office by October 23rd, 2015. The comments received before November 4th, 2015 will be able to be incorporated into the Document. After incorporating the Member States' contributions, this document will be submitted to the 31st Ministerial Meeting of the COMCEC to be held on 23-26 November 2015 in Istanbul, as an outcome of the 6th AWG Meeting.

Policy Advice I: Adopting/developing quality standards and implementing quality control, and identifying market opportunities for standard compliance of agricultural products.

Rationale:

One of the main challenges for the promotion of agricultural value chains in the OIC Member Countries is ensuring quality along supply chains. Informal characteristic of many value chains is one of the main reasons for the lack of quality standards and incentives for quality improvement. Ensuring quality in formal chains is also a significant challenge due to poor infrastructure, high transport costs and lack of capacity and knowledge on quality standards. In this respect, training and other capacity-building activities are required for supporting them to achieve compliance with emerging quality standards. Moreover, existing quality standards in the Member Countries should be harmonized with the international standards for enabling farmers to penetrate into the international agricultural markets.

Furthermore, producers generally face difficulties in producing products which comply with standards for food safety and quality. Similarly, difficulties occur in identifying favourable markets for their products. Nonetheless, there are also market opportunities for the producers depending on type of product and target market. For instance, halal products and organic products hold considerable market opportunities for the producers in the Member Countries.

Policy Advice II: Improving transport and storage facilities for promoting value chain development in the Member Countries through well-developed public-private partnerships.

Rationale:

The OIC Member Countries have relatively weak agricultural infrastructure, especially in terms of storage facilities and means of transport, which result in high costs and high post-harvest losses, and hinder smallholder farmers' access to market. Hence, developing agricultural infrastructure is particularly important for reducing post-harvest loses and high input costs as well as improving producers' market access. Nonetheless, this requires additional financial resources. Beside public investments, private sector involvement is also needed to have better agricultural infrastructure and logistics. In this respect, well-developed public-private partnerships and interested international organizations can be utilized for securing additional financial resources and sharing risks and benefits.

Policy Advice III: Supporting agro-processing and packaging industries to increase value added of agricultural products.

Rationale:

Agro-processing industries play a major role in adding value to the agricultural commodities. They upgrade agricultural products from raw materials to sophisticated and high-value commodities and contribute to income generation and to foreign exchange earnings. They also facilitate smallholder farmers' access to agricultural value chains. Nonetheless, in terms of actors, agricultural value chains in the Member Countries highly depend on the large number of smallholder farmers, small-scale processing units and small wholesalers and retailers. In addition, agricultural value chains in the Member Countries mainly depend on raw material such as wheat, rice, maize, fruit and vegetables or milk etc. There is a need to improve agro-processing industries in the Member Countries for adding value to the agricultural products and linking producers to the agricultural value chains. In this respect, public and private sector can be encouraged through sound policies and incentives with a view to increasing investments in agro-processing industries. Governments need to support small and medium enterprises through research and development (R&D) activities.

Instruments to Realize the Policy Advices:

COMCEC Agriculture Working Group: In its subsequent meetings, the Working Group may elaborate on the above-mentioned policy areas in a more detailed manner.

COMCEC Project Funding: Under the COMCEC Project Funding, the COMCEC Coordination Office calls for projects each year. With the COMCEC Project Funding, the member countries participating in the Working Groups can submit multilateral cooperation projects to be financed through grants by the COMCEC Coordination Office. For the above- mentioned policy areas, the member countries can utilize the COMCEC Project Funding and the COMCEC Coordination Office may finance the successful projects in this regard. These projects may include organization of seminars, training programs, study visits, exchange of experts, workshops and preparing of analytical studies, needs assessments and training materials/documents, etc.

Annex 4: List of Participants

LIST OF PARTICIPANTS
6th MEETING OF THE COMCEC AGRICULTURE WORKING GROUP
(OCTOBER 8th 2015, Ankara)

A. INVITED STATES

THE PEOPLE'S REPUBLIC OF BANGLADESH

- Mr. ARIFUR RAHMAN
First Secretary, Embassy of Bangladesh in Ankara

THE REPUBLIC OF GAMBIA

- H.E. MOMODOU BADJIE
Ambassador, Embassy of the Republic of Gambia

THE REPUBLIC OF INDONESIA

- Dr. HARJITO
Deputy Director for Regional Cooperation, Ministry of Agriculture
- Ms. RUTH AMOURNI NAPITUPULU
Assistant Deputy Director, Ministry of Agriculture
- Ms. IDA AYU RATIH
Assistant Deputy Director, Ministry of Agriculture
- Ms. DIAH BAYUMURTHI RETNO
Embassy of Indonesia in Ankara

THE ISLAMIC REPUBLIC OF IRAN

- Mr. MAHDI KAZEMNEJAD
General Director, Jihad Agriculture Ministry

THE HASHEMITE KINGDOM OF JORDAN

- Mr. YOUSEF ABDELGHANI
Minister Plenipotentiary, Embassy of Jordan

THE ISLAMIC REPUBLIC OF PAKISTAN

- Ms. SAADI WUGAR NISA
Second Secretary, Embassy of Pakistan in Ankara

THE STATE OF PALESTINE

- Mr. SAMER ALTEETI
Director of Policies and Planning, Ministry of Agriculture

THE STATE OF QATAR

- Mr. MOHAMMED KAID NAJI SAEED
Head of Unit of Plant Protection, Ministry of Environment

THE KINGDOM OF SAUDI ARABIA

- Mr. SAUD AL OTHMAN
Agricultural Planning Specialist, Ministry of Agriculture

THE REPUBLIC OF TURKEY

- Mr. NEVZAT BİRİŞİK
Deputy General Director, Ministry of Food, Agriculture and Livestock
- Mr. AHMET VOLKAN GÜNGÖREN
Head of Department, Ministry of Food, Agriculture and Livestock
- Mr. MEHMET AYDINBELGE
Coordinator, Ministry of Food, Agriculture and Livestock
- Dr. ERHAN EKMEN
Coordinator, Ministry of Food, Agriculture and Livestock
- Dr. HÜDAYİ ERCOŞKUN
Assoc. Prof.Dr. Food Engineer
- Dr. MELİK AYTAÇ
Professional Engineer, Ministry of Food, Agriculture and Livestock
- Mr. MELİH ARAL
Consultant, Ministry of Food, Agriculture and Livestock
- Ms. NAZLI ŞİMŞEK
Engineer, Ministry of Food, Agriculture and Livestock
- Mr. ADNAN HORAN
Engineer, Ministry of Food, Agriculture and Livestock
- Mr. AYHAN BARAN
Engineer, Ministry of Food, Agriculture and Livestock

- Mr. İZZET YILMAZ
Engineer, Ministry of Food, Agriculture and Livestock
- Ms. NİLÜFER YILDIZ
- Ms. NURHAN ŞAHİN
- Mr. İLHAMİ BAYDAR

INVITED INSTITUTIONS

ROYAL TROPICAL INSTITUTE

- Mr. SLOB BART
Advisor, Royal Tropical Institute

SÜTAŞ GROUP

- Ms. FATMA CAN SAĞLIK
Corporate Relations Coordinator

STATISTICAL, ECONOMIC AND SOCIAL RESEARCH AND TRAINING CENTRE FOR ISLAMIC COUNTRIES (SESRIC)

- Mr. FADI FARASIN
Researcher, Socio-Economic Research

UNITED NATIONS INDUSTRIAL DEVELOPMENT ORGANIZATION (UNIDO)

- Mr. BASSEL EL KHATIB
Industrial Development Officer
- Mr. FRANK HARTWICH
Industrial Development Officer

COMCEC COORDINATION OFFICE

- Mr. M. METİN EKER
Director General, Head of COMCEC Coordination Office
- Mr. MUSTAFA TEKİN
Head of Department
- Mr. FATİH KAYA
Head of Department

- Ms. AYLİN ŞENOL GÜN
Expert
- Mr. E. EMRAH HATUNOĞLU
Expert, Drafting
- Mr. MEHMET FİDAN
Assistant Expert, Drafting
- Mr. MUSTAFA ADİL SAYAR
Assistant Expert, Drafting
- Mr. ALİ ORUÇ
Assistant Expert
- Mr. HASAN YENİGÜL
Assistant Expert, PCM
- Mr. NİHAT AKBALIK
Protocol Relations
- Ms. ÖZGÜL YÜKSEL
Coordinator
- Ms. HANDE ÖZDEMİR
Coordinator of Registration Office
- Ms. HAVVA KÖSEOĞLU
Coordination of Registration Office
- Mr. OZAN LİF
Coordination of Documentation Center
- Mr. KEMAL ARSLAN
Coordinator of Meeting Rooms
- Mr. ALİ VURAL
Coordination of Meeting Rooms
- Mr. ERCAN İBİK
Coordinator of Transportation
- Ms. NAZİFE GÜLGEN
Coordination of Social Programme