

Making Cooperation Work

CÔMCEC STRATEGY

For Building an Interdependent Islamic World

COMCEC
AGRICULTURE OUTLOOK
2013



2nd Meeting of the Agriculture Working Group

December 19th, 2013
Ankara, Turkey

OUTLINE

- The COMCEC Strategy on Agriculture
- The Role of Agriculture in the OIC Economy
- Agricultural Population
- Agricultural Labor Productivity
- Land Use
- Irrigation
- Agricultural Production and Productivity
- Food Security
- Discussions

The COMCEC Strategy on Agriculture

Cooperation areas;

- ▶ Trade
- ▶ Transport & Communications
- ▶ Tourism
- ▶ ***Agriculture***
- ▶ Poverty Alleviation
- ▶ Finance

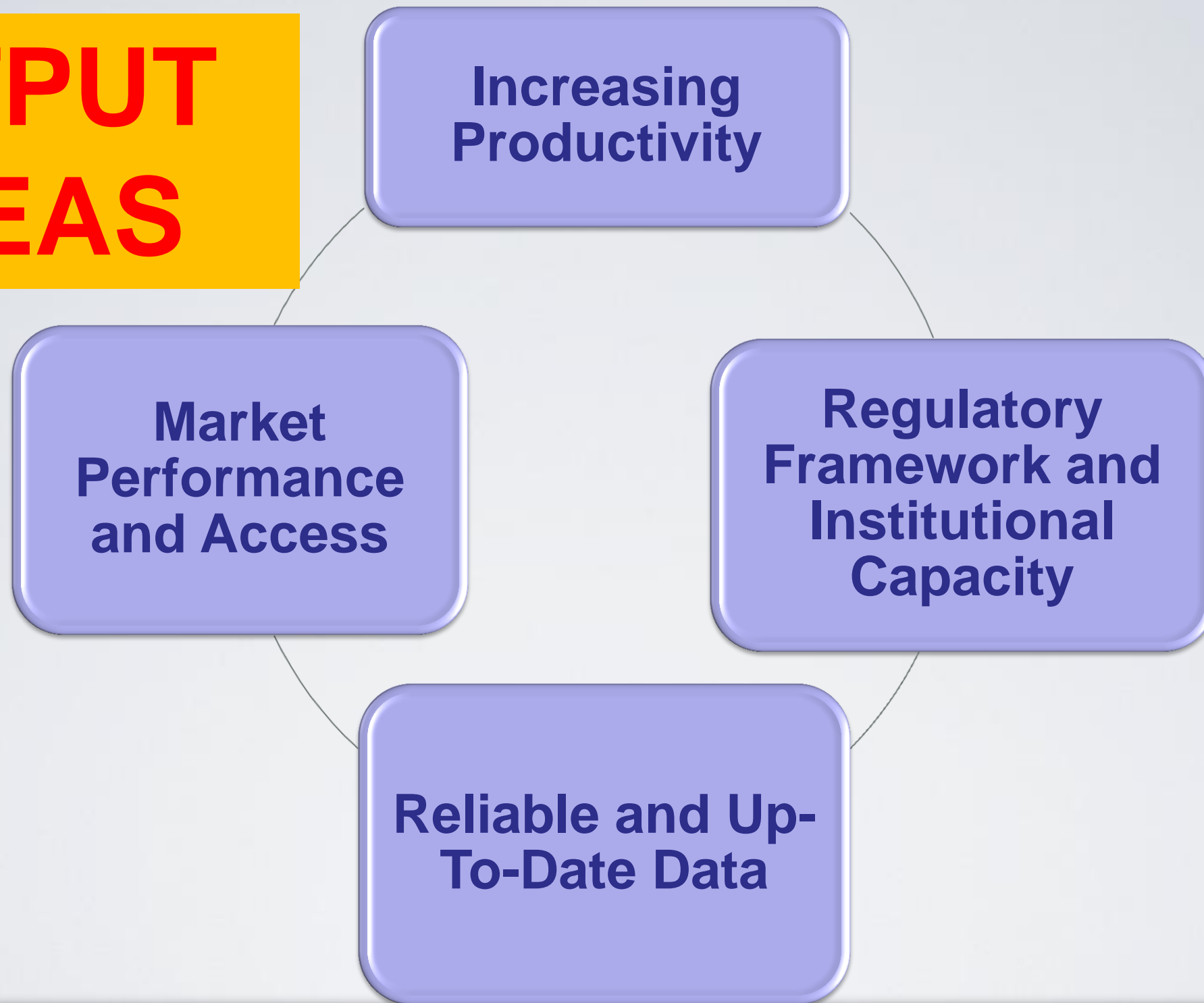
The COMCEC Strategy on Agriculture

Strategic Objective;

Increasing the productivity of agriculture sector and sustaining the food security in the COMCEC Region.

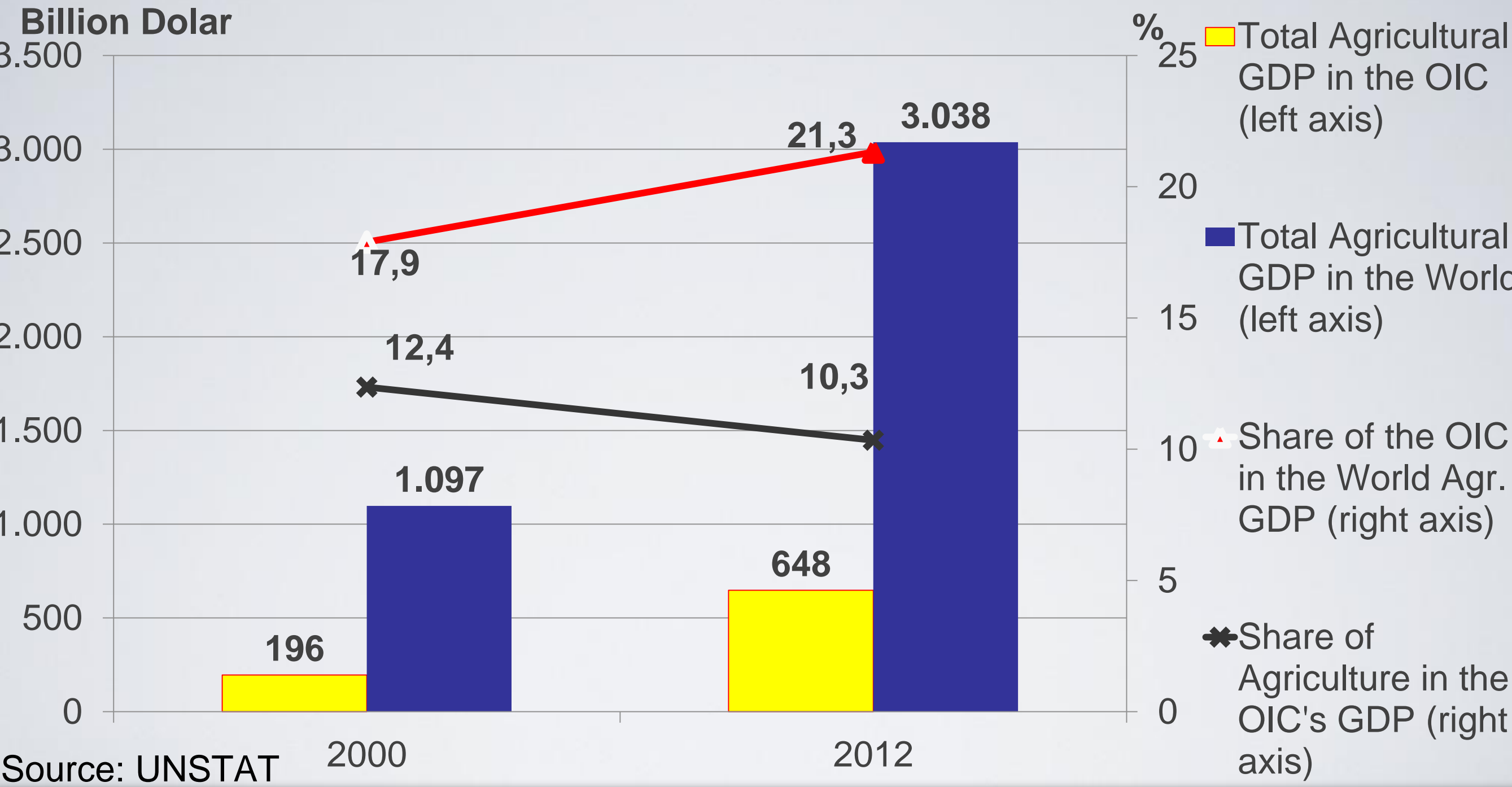
The COMCEC Strategy on Agriculture

OUTPUT AREAS



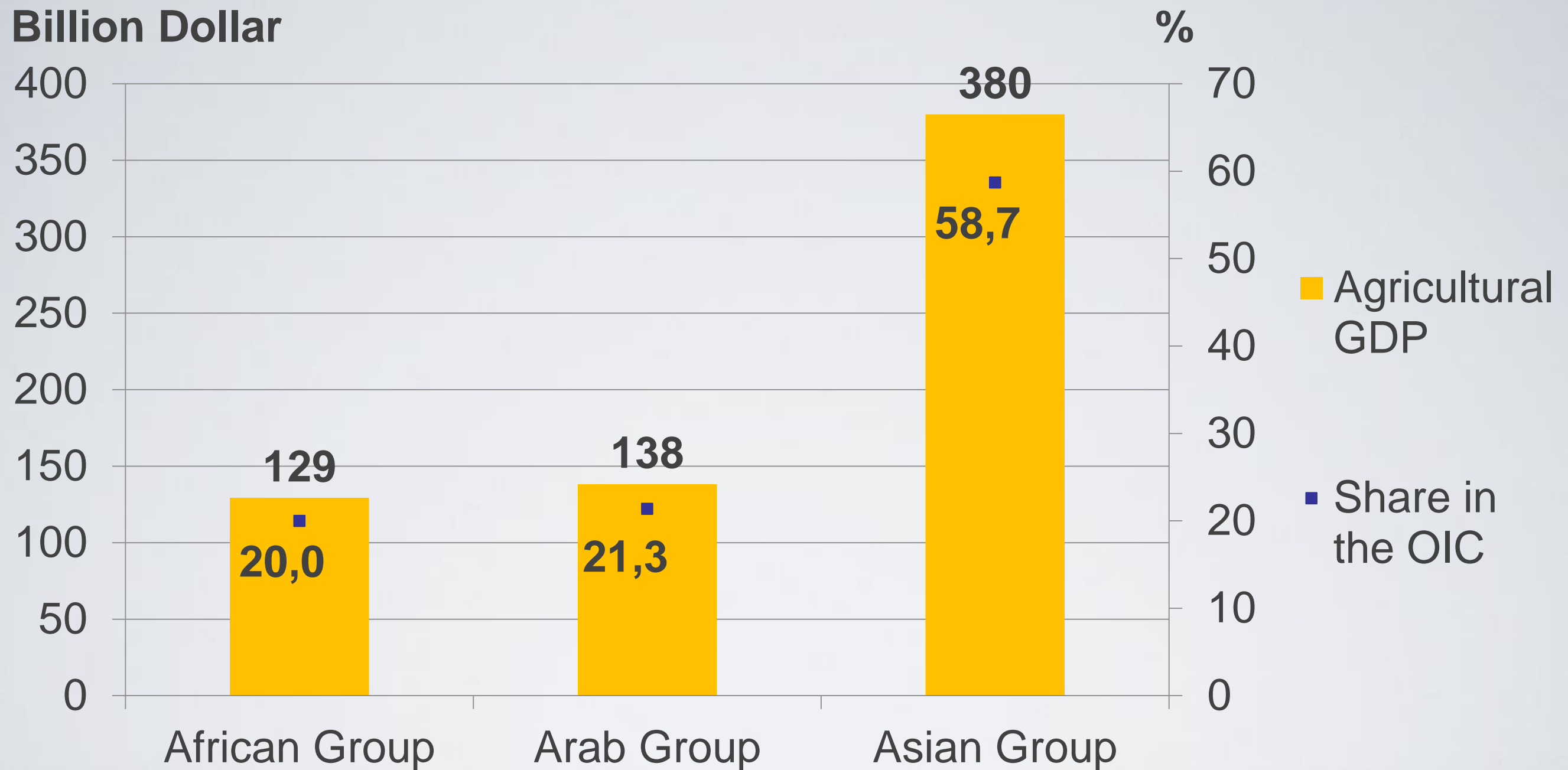
The Role of Agriculture in the OIC Economy

❖ Agricultural Value Added



The Role of Agriculture in the OIC Economy

❖ Agricultural Value Added by Sub-Region, 2012



Source: UNSTAT

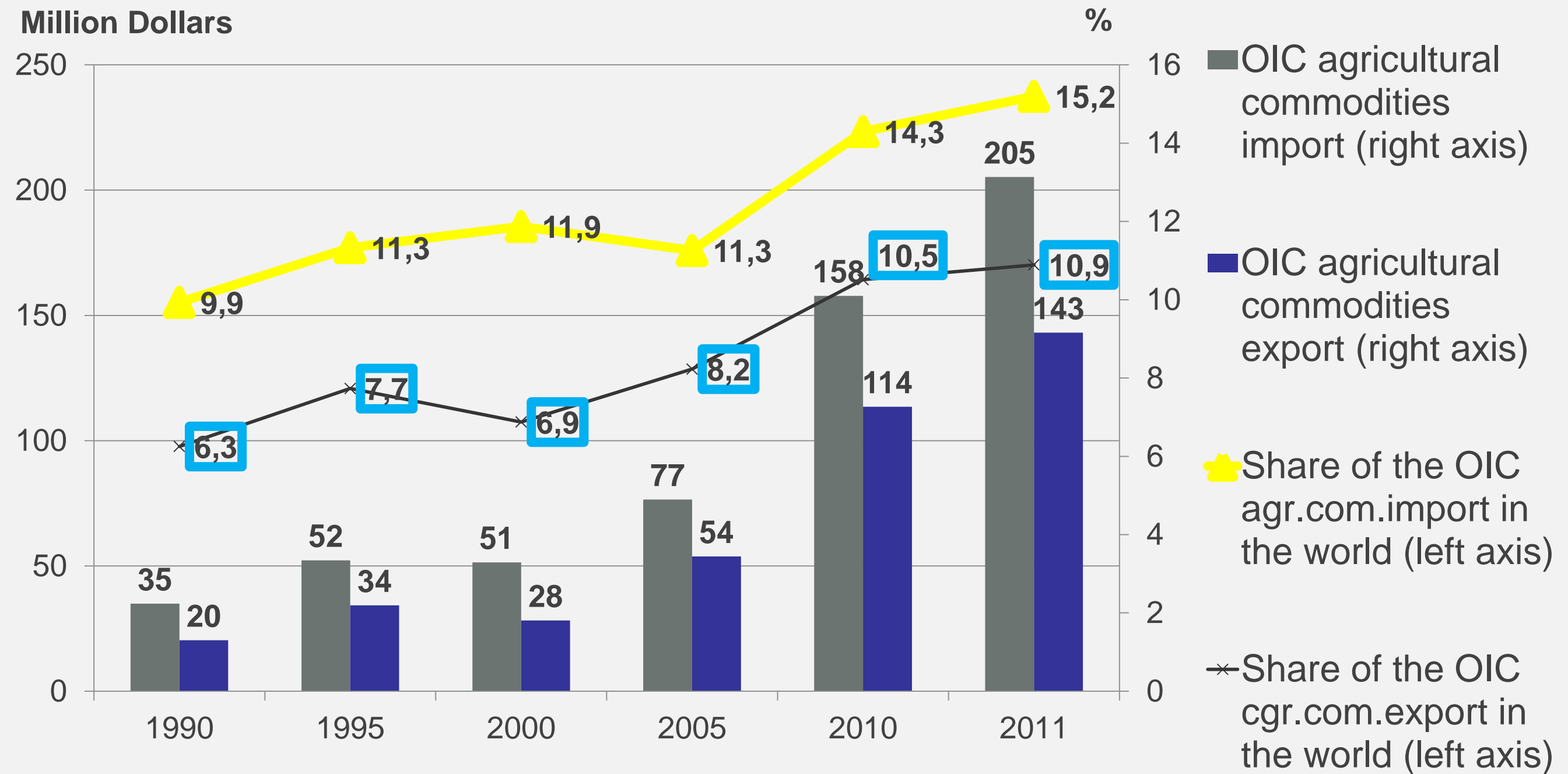
The Role of Agriculture in the OIC Economy

❖ Agricultural Value Added

- ❑ Indonesia had the highest amount of agricultural GDP with 19,6 percent.
- ❑ The five member countries (Indonesia, Nigeria, Turkey, Iran and Pakistan) accounted for half of the OIC agricultural GDP.

The Role of Agriculture in the OIC Economy

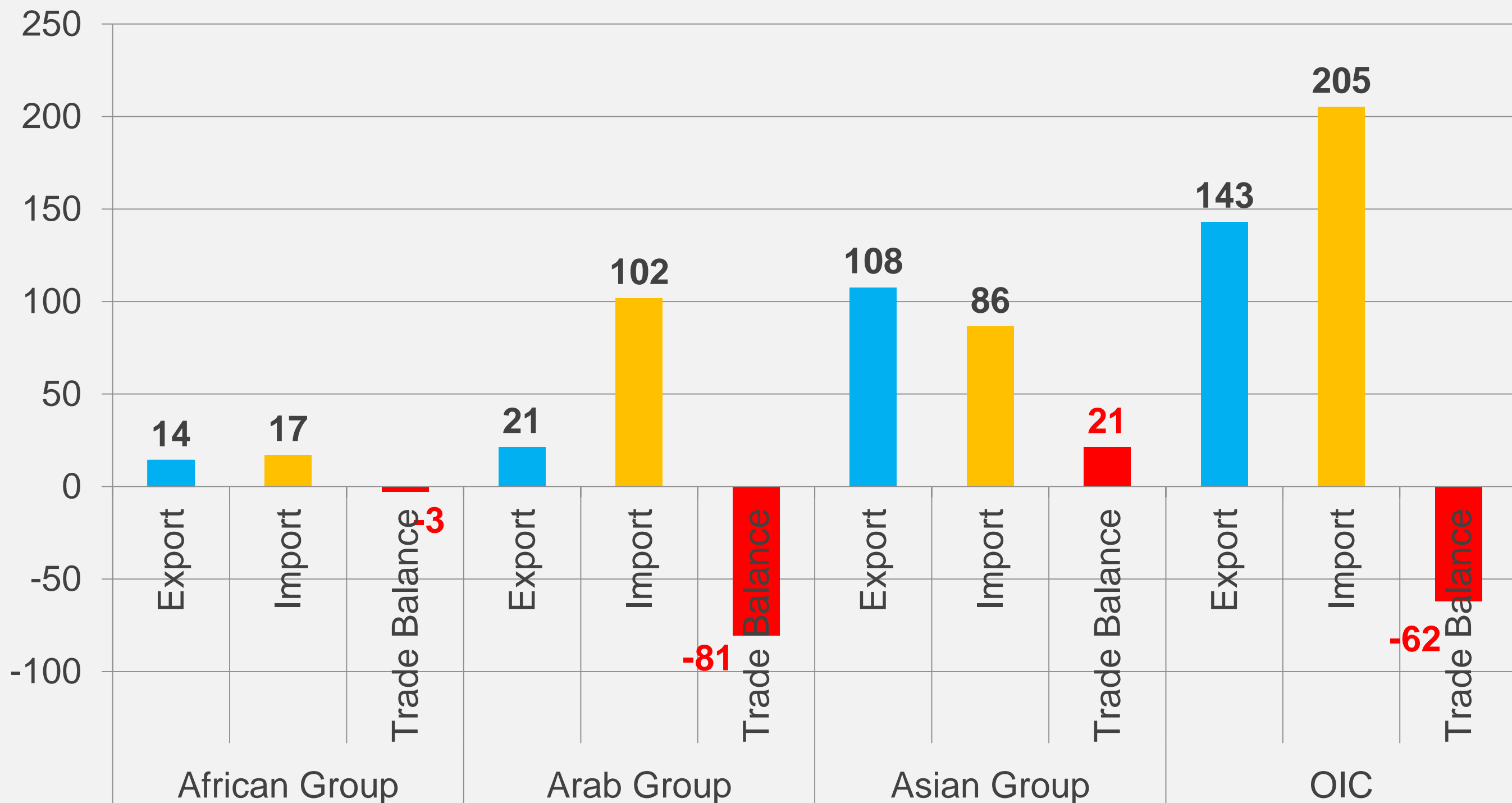
❖ Agricultural Trade of the OIC, 1990-2011



Source: FAO

The Role of Agriculture in the OIC Economy

Agricultural Commodity Trade Balance (2011, billion \$)



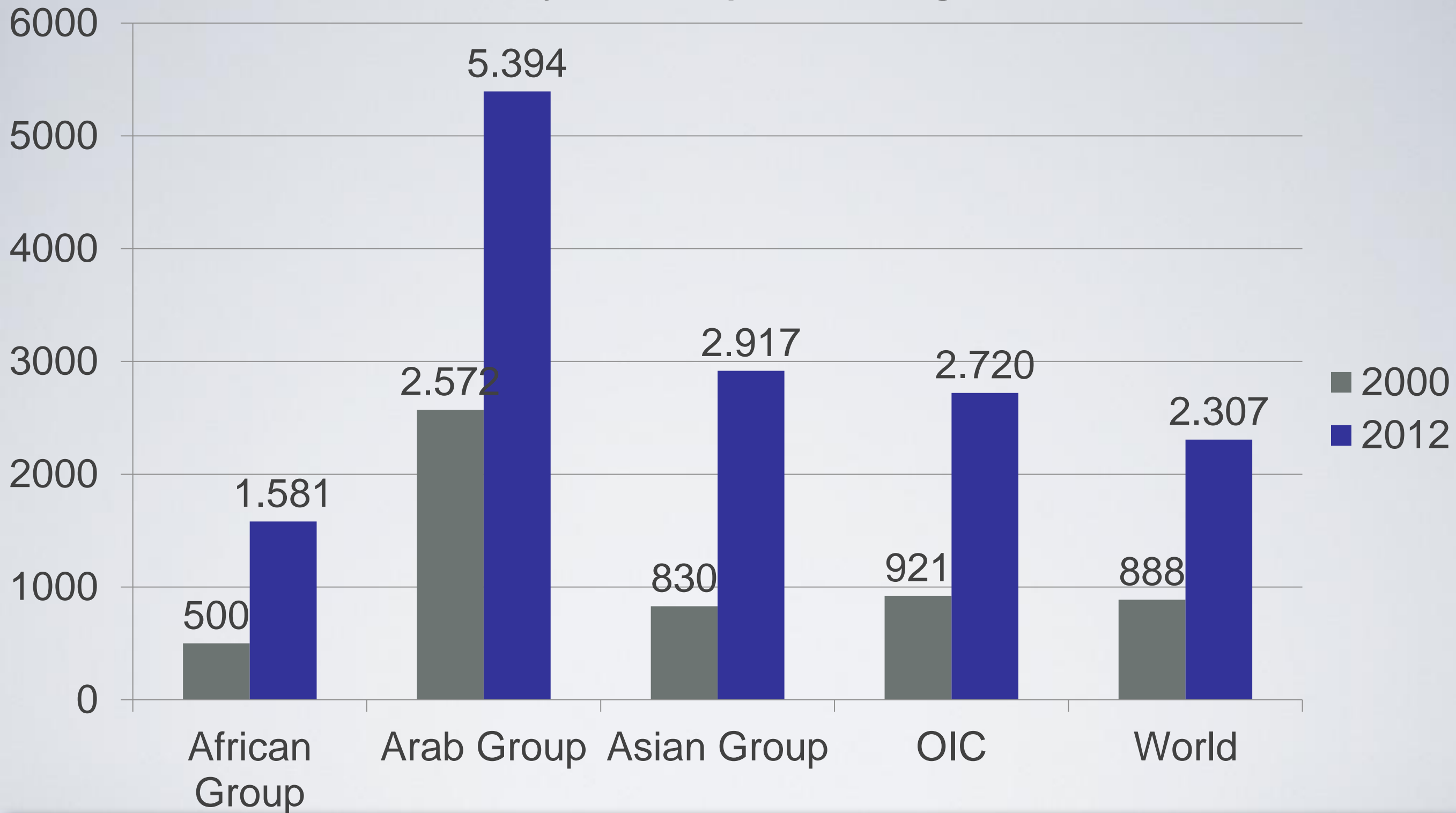
Agricultural Population

As of 2012;

- ❑ The total population of the OIC is about 1,62 billion,
- ❑ The agricultural population of its Member Countries, 568 million, constituted 35,0 percent of the total OIC population,
- ❑ the share of agricultural population in total population:
 - in 1990 46,8 percent
 - in 2000 42,2 percent
 - in 2012 35,0 percent

Agricultural Labor Productivity

❖ US Dollar / Per Economically Active Population in Agriculture



Land Use

	Land Area	Agricultural Area	Arable Land	Permanent Crops	Permanent Meadows and Pastures
OIC (million ha)	3.192	1.420	293	55	1.043
Share in Total Agricultural Area (%)		100	20,7	3,9	73,5
World (million ha)	13.003	4.912	1.396	154	3.359
Share of OIC in the World (%)	24,5	28,9	21,0	35,9	31,1

Source: FAO

Land Use (%)

	Land Area	Agricultural Area	Arable Land	Permanent Crops	Permanent Meadows and Pastures
African Group	24,1	25,3	35,3	24,4	23,2
Arab Group	43,1	37,4	18,7	14,6	43,6
Asian Group	32,9	37,3	46,0	61,0	33,2
OIC	100	100	100	100	100

Source: FAO

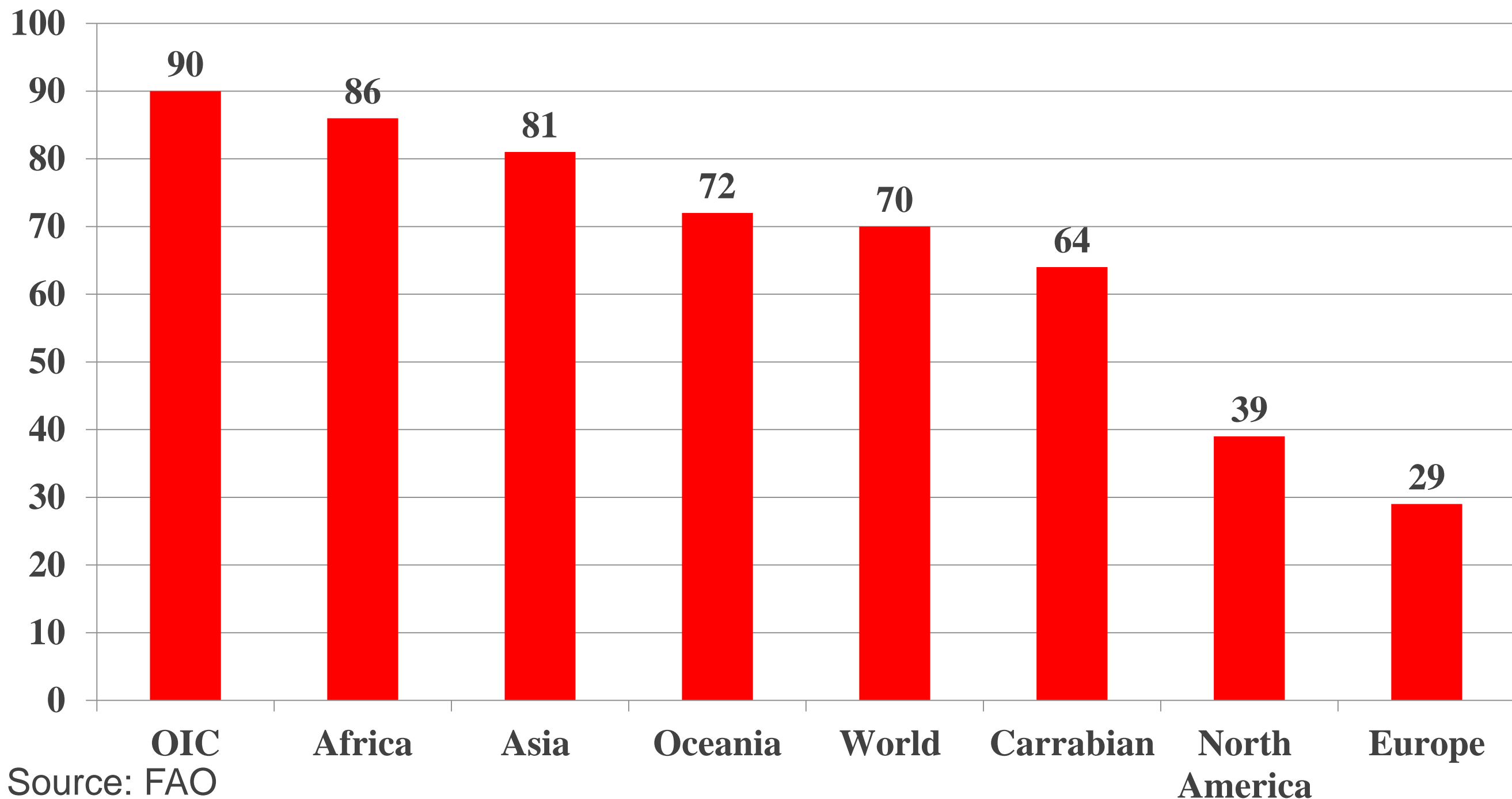
Land Use

At country level top three country are;

- Kazakhstan with 14,7 percent
- Saudi Arabia with 12,2 percent
- Sudan 7,7 percent

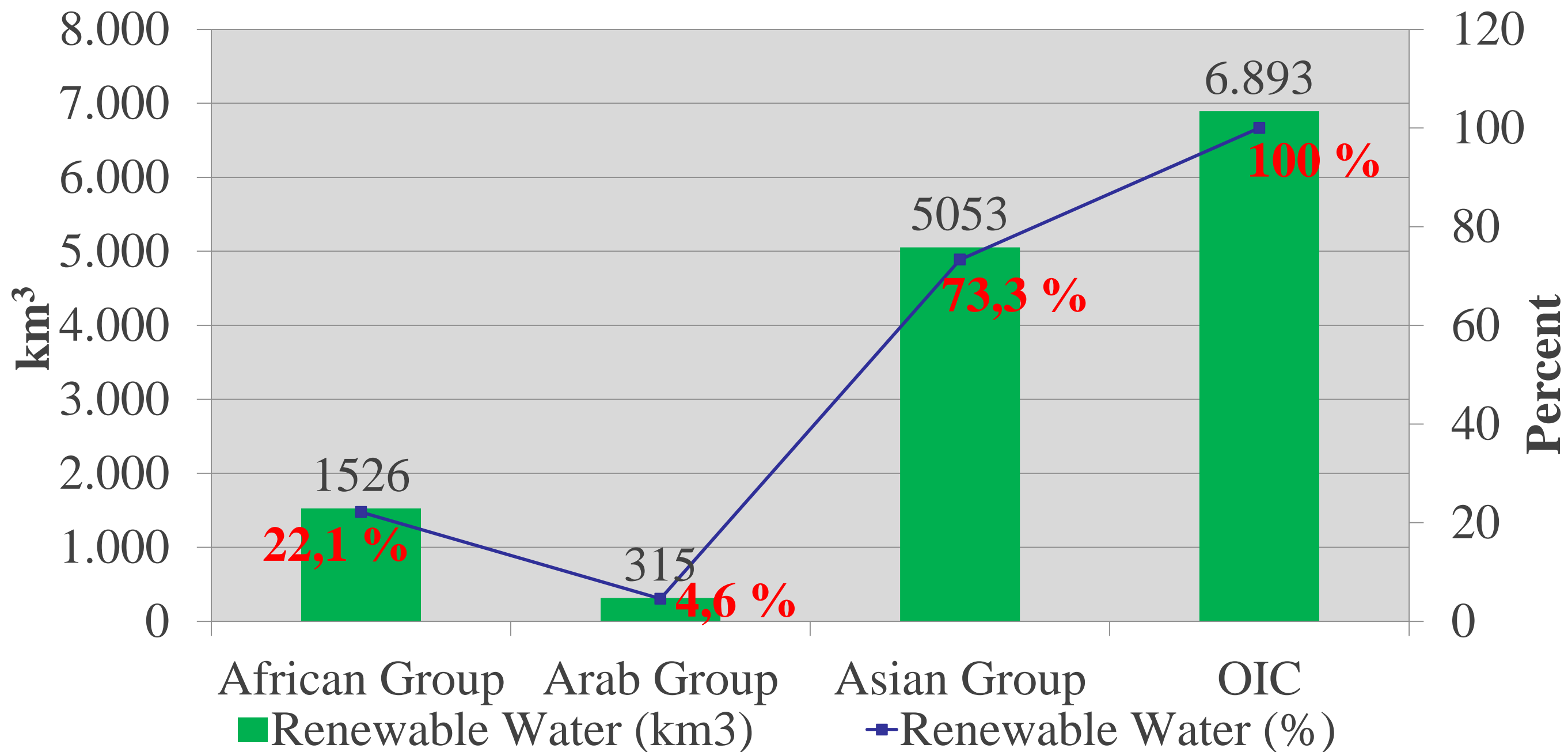
Irrigation

❖ Share of Agriculture in Total Water Consumption.



Irrigation

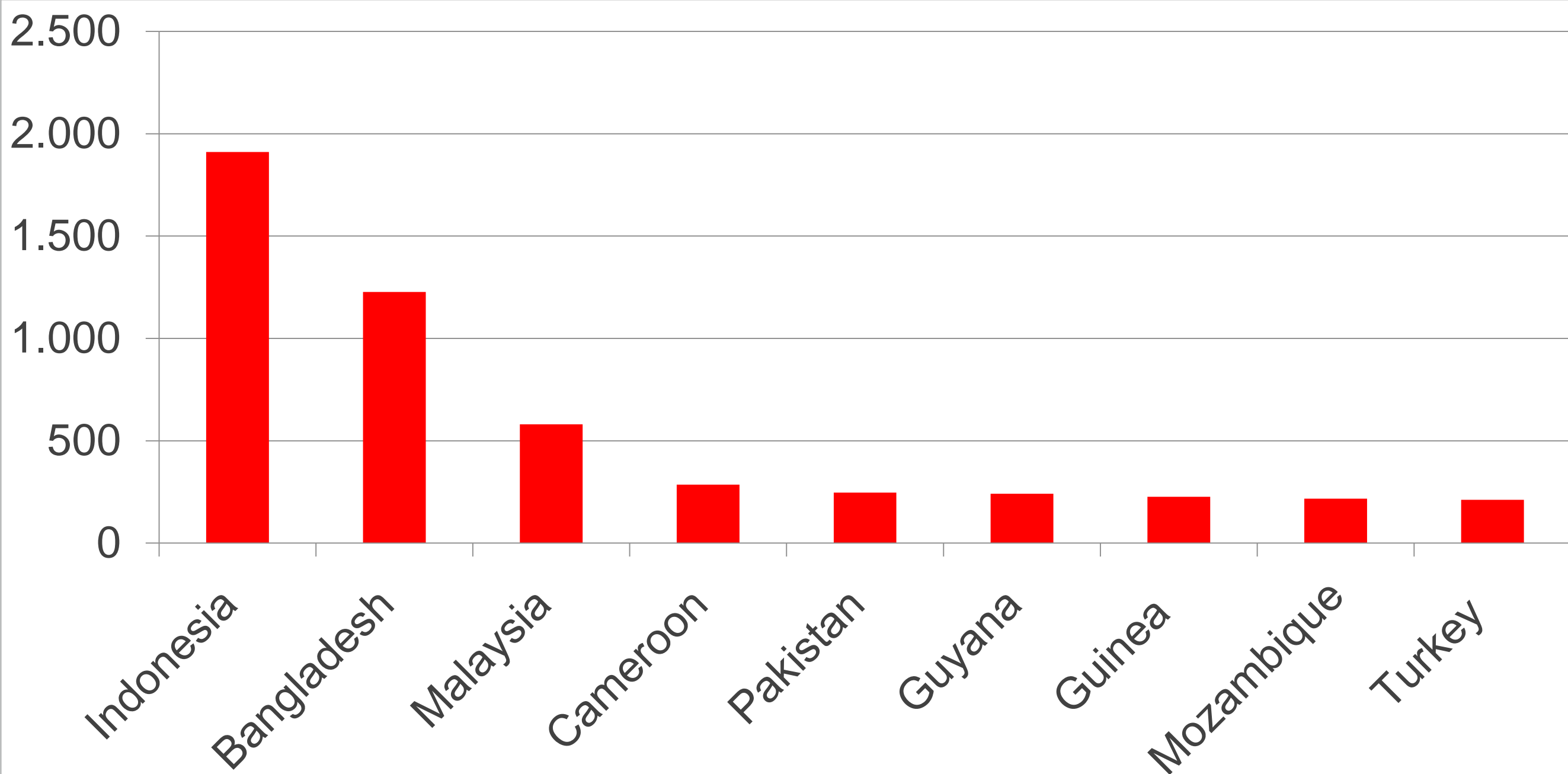
❖ Renewable Water Potential in the OIC (2011)



Source: FAO

Irrigation

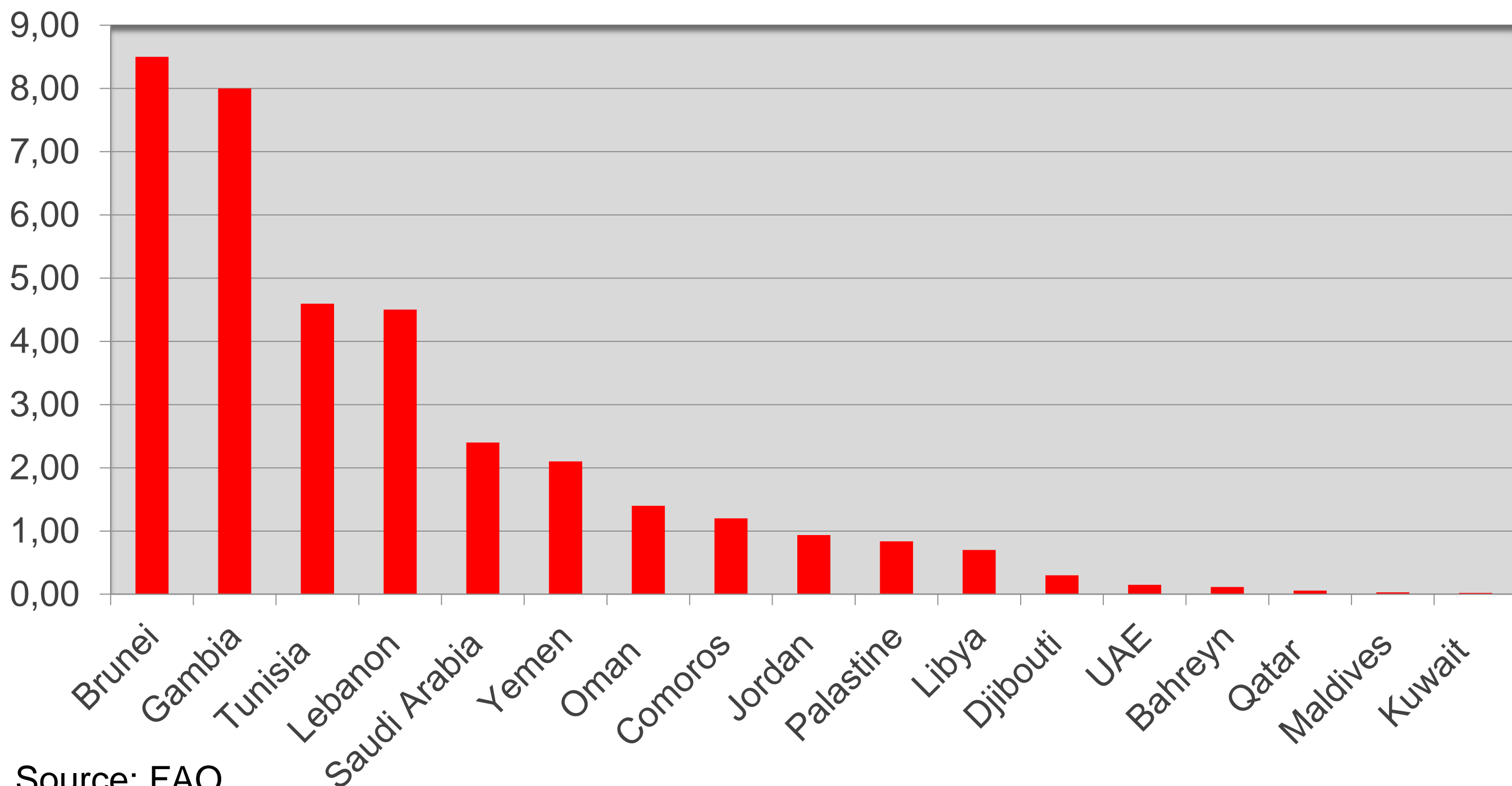
❖ Renewable Water-Rich OIC Member Countries, (over 200 km³/year)



Source: FAO

Irrigation

❖ Renewable Water-Poor OIC Member Countries, (below 10 km³/year)



Source: FAO

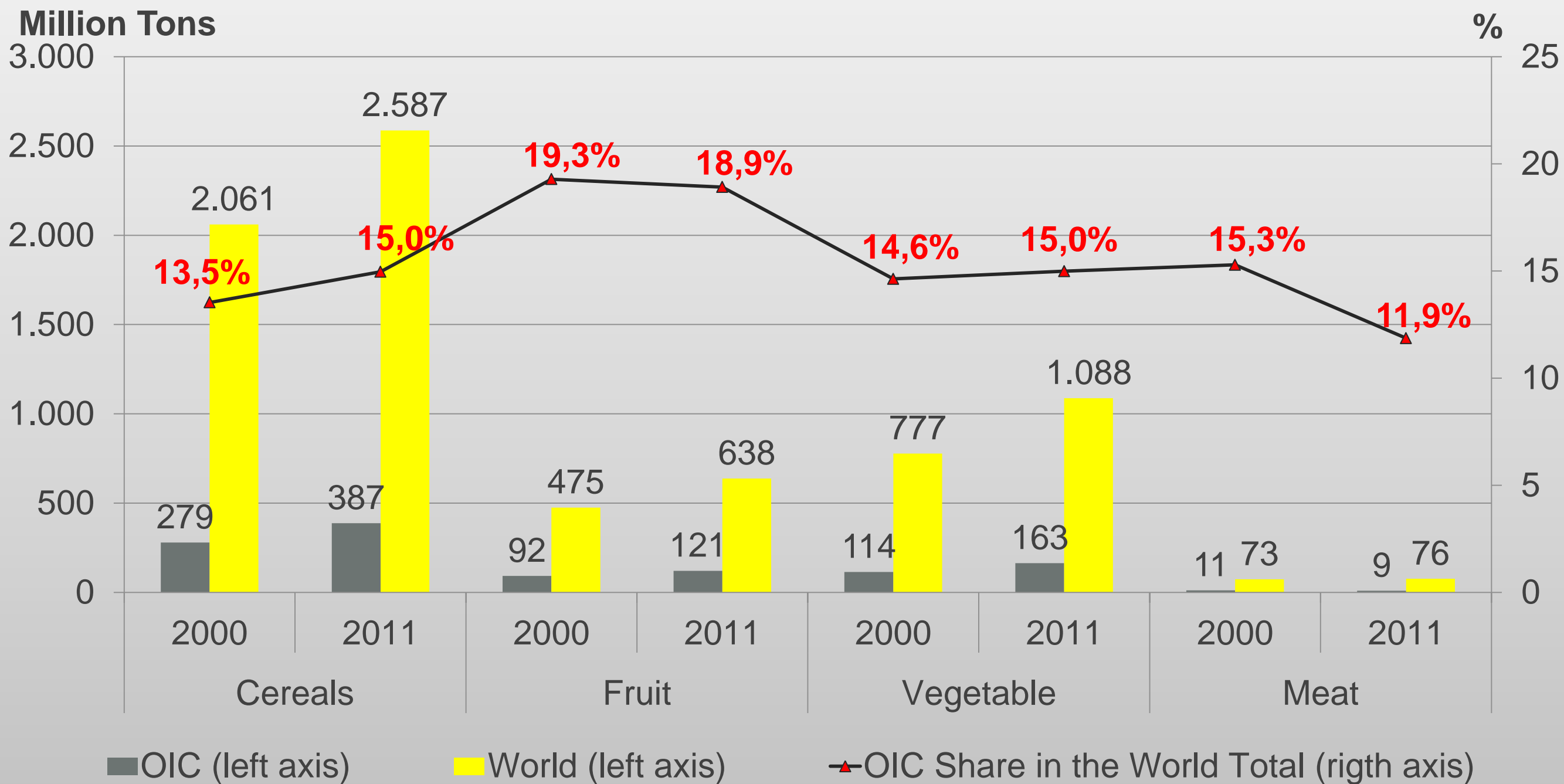
Irrigation

❖ Precipitation

- Most of the OIC Countries have average precipitation less than 500 mm per year,
- Arab Group (covers 20 countries) have 500 mm precipitation (except for Comoros and Lebanon)
- 16 countries possess more than 1.000 mm
- Malaysia, Brunei, Indonesia, Bangladesh, Sierra Leone, Guyana and Suriname receive over 2.000 mm

Agricultural Production and Productivity

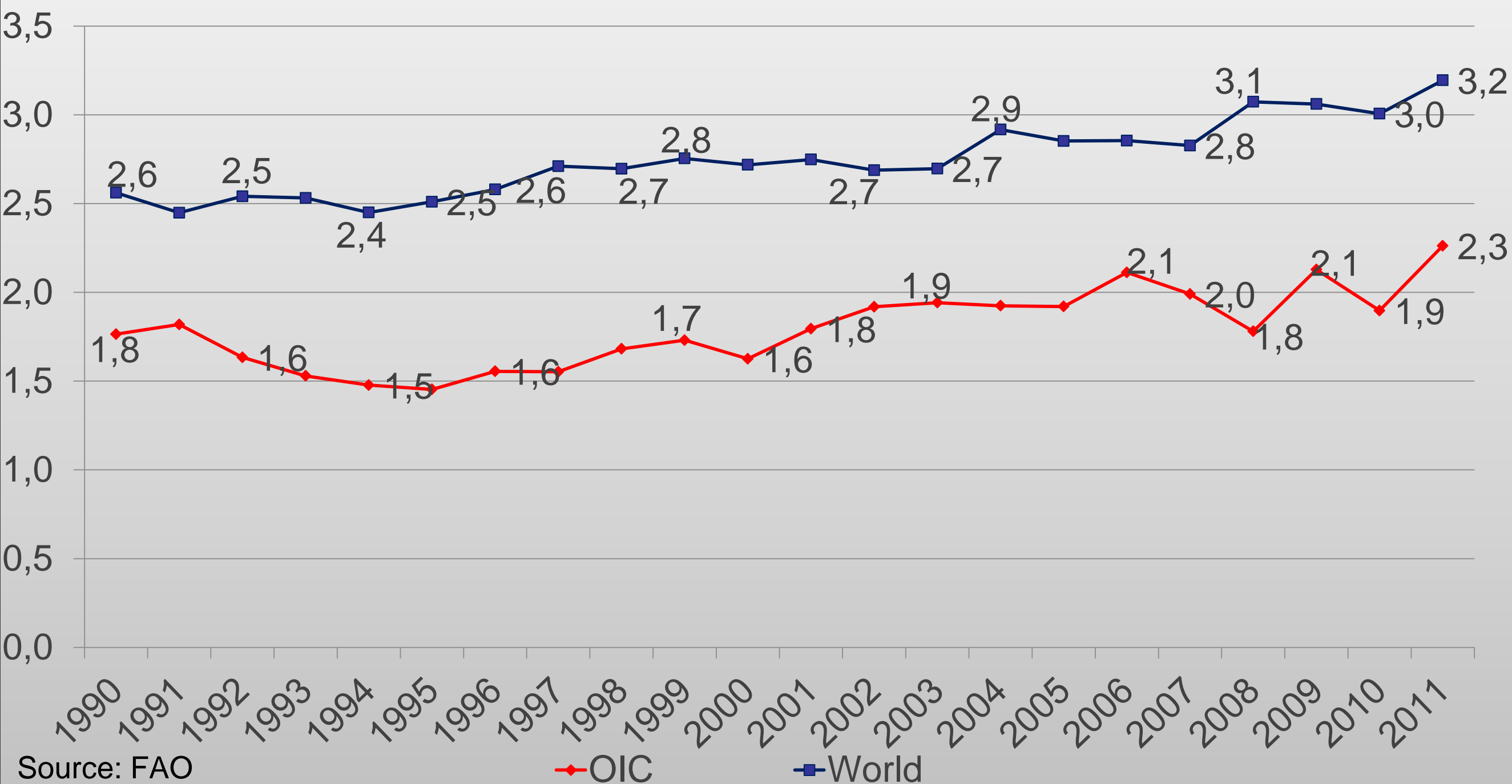
❖ Agricultural Production in the OIC



Source: FAO

Agricultural Production and Productivity

❖ Wheat Yield in the OIC and the World, (1990-2011, tons/hectare)



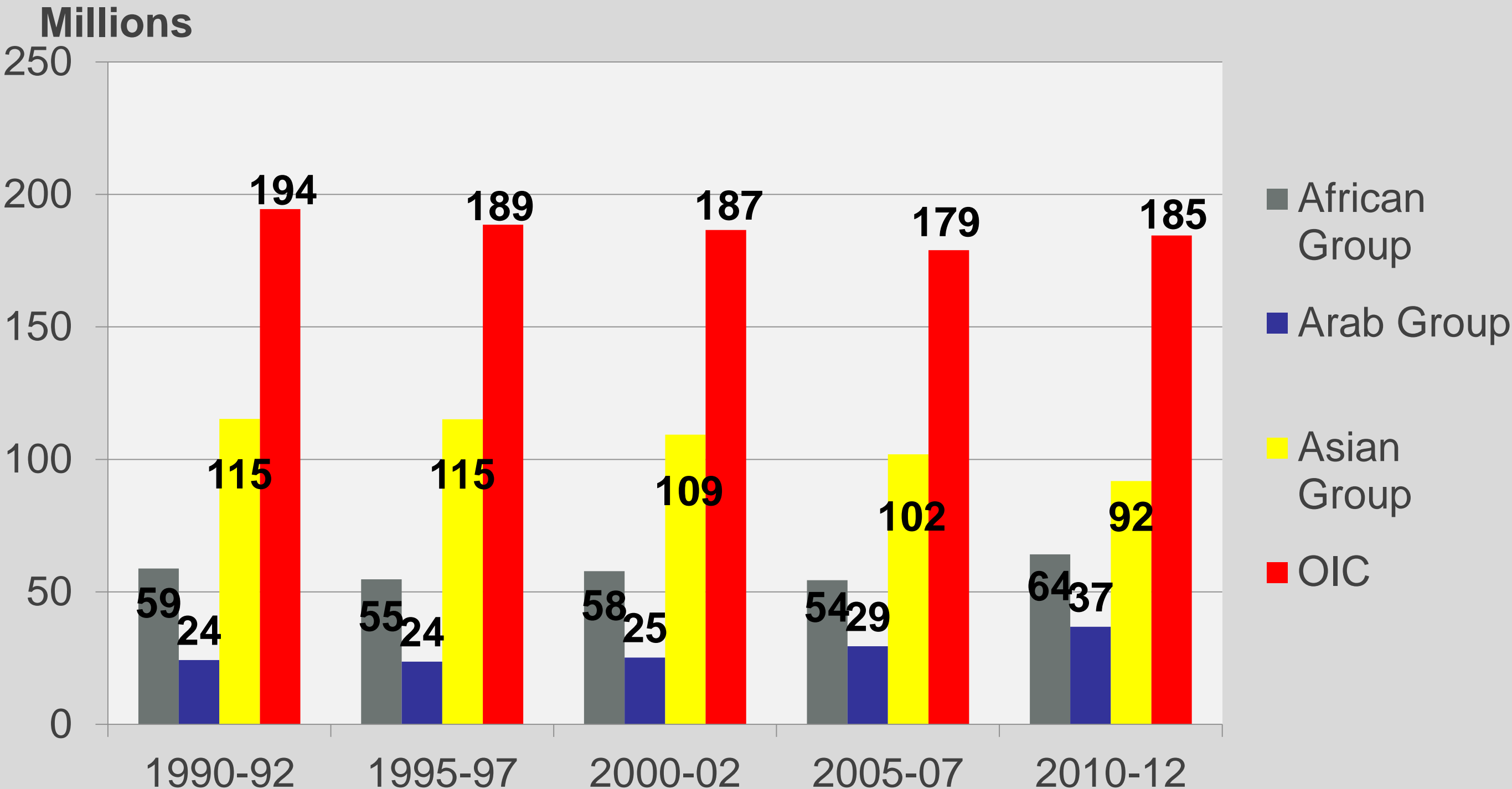
Food Security and Malnutrition



HUNGER MAP						
Category						
Undernourished	< 5 %	5 - 9 %	10 - 19 %	20 - 34 %	≥ 35 %	
Description	Extremely Low	Very Low	Moderately Low	Moderately High	Very High	Incomplete Data

Food Security and Malnutrition

❖ Trend of the Number of the Undernourished People In the OIC



Source: FAO and IFPRI

Food Security and Malnutrition

Two basic categories regarding to the food consumption;

- ❑ **dietary energy supply adequacy:** there is not a serious problem in the OIC as a whole
- ❑ **average protein supply:** less than needed level in general

Food Security and Malnutrition

❖ Affordability

- ❑ OIC's economic growth ratio has been over the world average since 2001,
- ❑ The share of the OIC in global GDP (8,3 percent) is still very low, considering the OIC population constitutes almost 23 percent of the world population,
- ✓ Percapita GDP in the OIC is 1/3 of the world's

Food Price Indices and Food Security

	2000	2005	2006	2007	2008	2009	2010	2011	2012
Albania	100	114,3	115,6	119	124,3	130,4	136,7	143,2	146,5
Bahrain	100	101,3	103,3		119,8	130,6	137	139,7	145,4
Bangladesh	100	127,8	137,5	151,9	168,7	177,9	195,9	221	237,5
Egypt	100	105,1	115,7	130,6	162	188,1	225,3	260,2	284,2
Indonesia	100	140,3	161,9	180,4	210,9	225,7	247	268,1	283,8
Iran	100	186,3	205,5	100	131	146,5	164,8	207,8	283,1
Malaysia	100	108,8	112,5	115,9	126,1		134,5	141	144,8
Turkey	100	112,1	123	138,2	155,9	168,4	186,2	197,8	214,5
France	100	111	112,7	114,3	119,9	120,4	121,4	123,7	127,4
Germany	100	105,3	107,3	110,5	118,3	116,8	118,5	121,8	125,8
Africa	99,8	156,6	168,9	186,6	224,8	252,4	271,2	308,1	336,3
Asia	100	119,6	126,3	136,6	154,7	164,6	179,7	195,3	207,4
Europe	100	127,2	132	138	151,6	157	160,5	168,3	173,4
World	100	126,3	133,1	143,3	162	172,4	185,1	200,7	212,8

Source: FAO



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Global Food Security Index

- ❑ The Global Food Security Index considers the core issues of affordability, availability, quality and safety across a set of 105 countries.
- ❑ The overall goal of the study is to assess which countries are most and least vulnerable to food insecurity through the categories of Affordability, Availability, and Quality and Safety.
- ❑ All scores are normalised on a scale of 0-100 where 100=most favourable.

Global Food Security Index

The Index includes 34 OIC Countries;

FIRST TEN COUNTRIES		LAST TEN COUNTRIES	
Saudi Arabia	68,7	Burkina Faso	30,2
Malaysia	63,9	Cambodia	30
Turkey	63,7	Rwanda	29,8
Tunisia	52,7	Mozambique	29,2
Egypt	51,6	Niger	29,2
Kazakhstan	51,1	Senegal	28,8
Jordan	50,6	Sierra Leone	28,7
Morocco	49,3	Sudan	27,6
Indonesia	46,8	Togo	27,5
Azerbaijan	44,4	Chad	20,2

Challenges in the OIC Agriculture

- ❑ Low productivity,
- ❑ Inefficient use of water resources and land
- ❑ Inefficient use of agricultural machinery and technologies,
- ❑ Low levels of agricultural investments,
- ❑ Poor market performance,
- ❑ Deregulation policies and inadequate agricultural planning and strategy making,
- ❑ Lack of reliable and up-to-date data,
- ❑ Lack of effective governance
- ❑ Poor risk management of natural disasters

Recommendations

- ❑ To make efforts to increase agricultural productivity,
- ❑ To increase collaboration on information share,
- ❑ To increase intra-OIC agricultural technology transfer,
- ❑ To make efforts to enhance intra-OIC agricultural investments,
- ❑ To increase efficiency of agricultural commodity markets

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Thank You



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