



REPUBLIC OF TÜRKİYE
MINISTRY OF AGRICULTURE
AND FORESTRY

**20TH MEETING OF THE COMCEC AGRICULTURE
WORKING GROUP
(May 11th, 2023, Virtual Meeting)**



***“Ensuring the Sustainability of Agricultural Inputs to Combat Food
Insecurity in the OLC Member Countries”***

MINISTRY OF AGRICULTURE AND FORESTRY

REPUBLIC OF TÜRKİYE

GENERAL DIRECTORATE OF PLANT PRODUCTION

DEPARTMENT OF SEED POLICY

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- Agricultural inputs are important for **efficient use of agricultural lands and increase yield**, but with the **recent crises of the World**; Covid-19, climate crisis, food crisis, Ukraine and Russia War highlights the **strategic importance of seed** that directly determines the product quality and productivity (yield) hence in providing food safety and security.
- The importance of seed is also prominent because **quality and healthy seeds** usage has considerable impacts on the **increase of crops yield, prevent harvest losses, protect environment by less use of other inputs like fertilizers, pesticides and water, increase marginal benefits of all inputs** (by optimised use) **and decrease the cost of agricultural production.**
- The analysis of **economic value of seed in the agri-food chain** (Bonny, 2017) shows that although seeds have a low economic weight in the agri-food chain, **the added value is higher** for agri-food system in terms of **economic value of end-product.**
- Source: Bonny Sylvie (2017), Corporate Concentration and Technological Change in the Global Seed Industry, Sustainability, Vol.9, pp.1635



LEGAL FRAMEWORK

seed management and control;

2 main laws (Seed Law and Breeders' Rights Law) and 3 subsidizing laws

- **Law No. 5553** **SEED LAW** **(2006)**
- **Law No. 5042** **LAW ON PROTECTION OF BREEDERS' RIGHTS OF NEW PLANT VARIETIES (2004)**
- **Law No. 5996** **LAW ON VETERINARY SERVICES, PLANT HEALTH, FOOD AND FEED (2010)**
- **Law No. 5488** **AGRICULTURE LAW (2006)**
- **Law No. 5977** **BIOSAFETY LAW (2010)**

and Regulations, Communiqués and Circulars and Instructions



POLICY TARGETS ON THE SECTOR

**Increase
Production for
adequate seed
supply and
quality
assurance
(certification
system)**

**Integration to
Global and
regional trade,
trade balance**

**Sectoral
organization
(Producer
Unions)**

**Promoting
new
varieties,
registration
and
certification**

**Protection,
promoting of
breeders rights
and local
varieties**

**Support and
subsidies
(certified seed
usage and
production)**

**R&D
(genetic
resources,
varieties)**

**Training
(seed
controllers)**

**Planning
Programming**

**Monitoring
and Evaluation**



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MEMBERSHIP TO INTERNATIONAL ORGANISATIONS

SEED PRODUCTION-
CERTIFICATION



The Organization for Economic Co-operation
and Development-Seed schemes

BREEDING AND VARIETY
REGISTRATION



The International Union for the
Protection of New Varieties of
Plants

PHYTOSANITARY, SEED TRADE AND
STANDARDS



International Seed Testing
Association – ISTA



International Seed
Federation



Food and Agriculture Organization
of the United Nations

WTO (WORLD TRADE ORGANIZATION)

EUROPEAN UNION STANDARDS
AND LEGISLATIONS



GLOBAL SEED TRADE (2020)

GLOBAL EXPORT:

Global Seed Export Value accounts to around 16 billion USD, of which Netherlands, France, USA, Germany and Denmark are leaders corresponding to around 60 % of World seed export.

GLOBAL IMPORT:

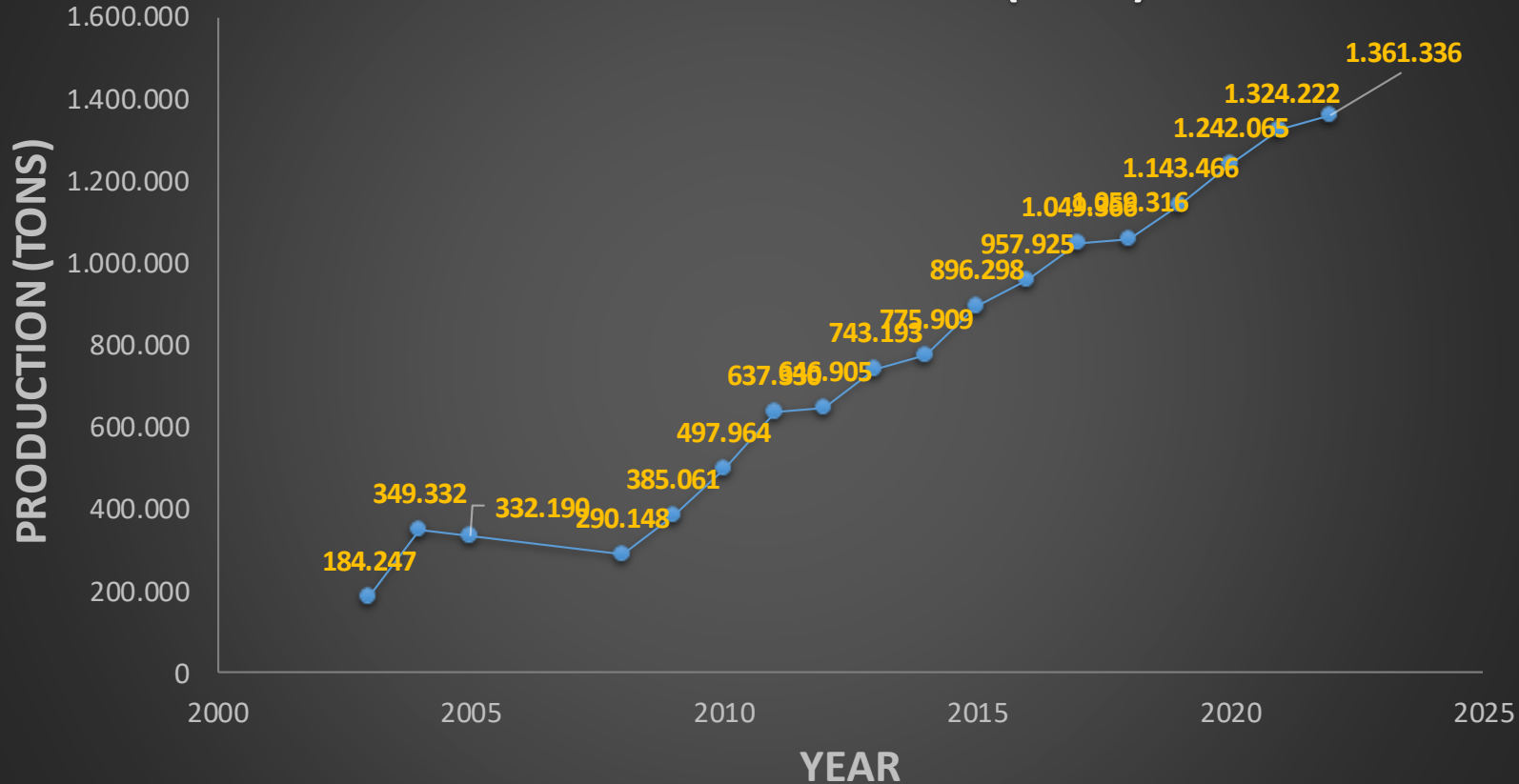
Global Import Value is about 15 Billion USD of which France, Netherlands, USA, Germany and Italy are leading Countries taking the place on the 40% share of the World seed imports.

Türkiye replaces around 1.5 % share and Algeria, Morocco, Pakistan, Egypt and Saudi Arabia have shares of more than 0.5 % of World seed import.

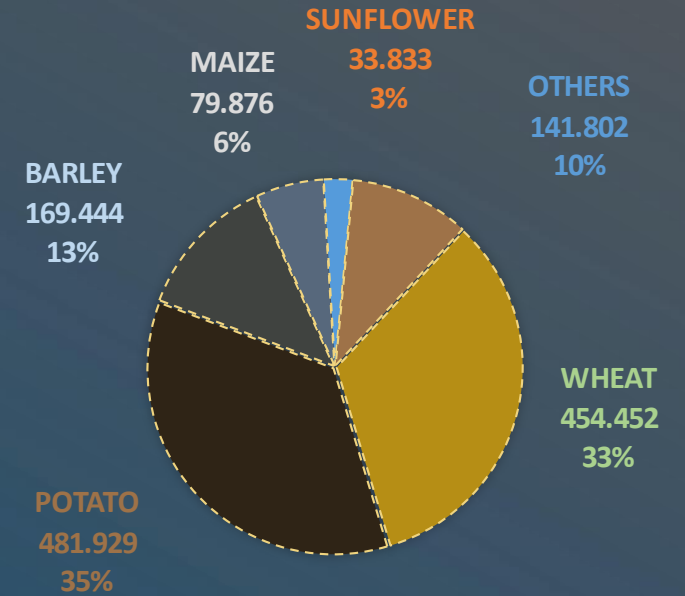


SEED PRODUCTION IN TÜRKİYE

Certified Seed Production (Tons)



PRODUCTION BY SPECIES (2022)

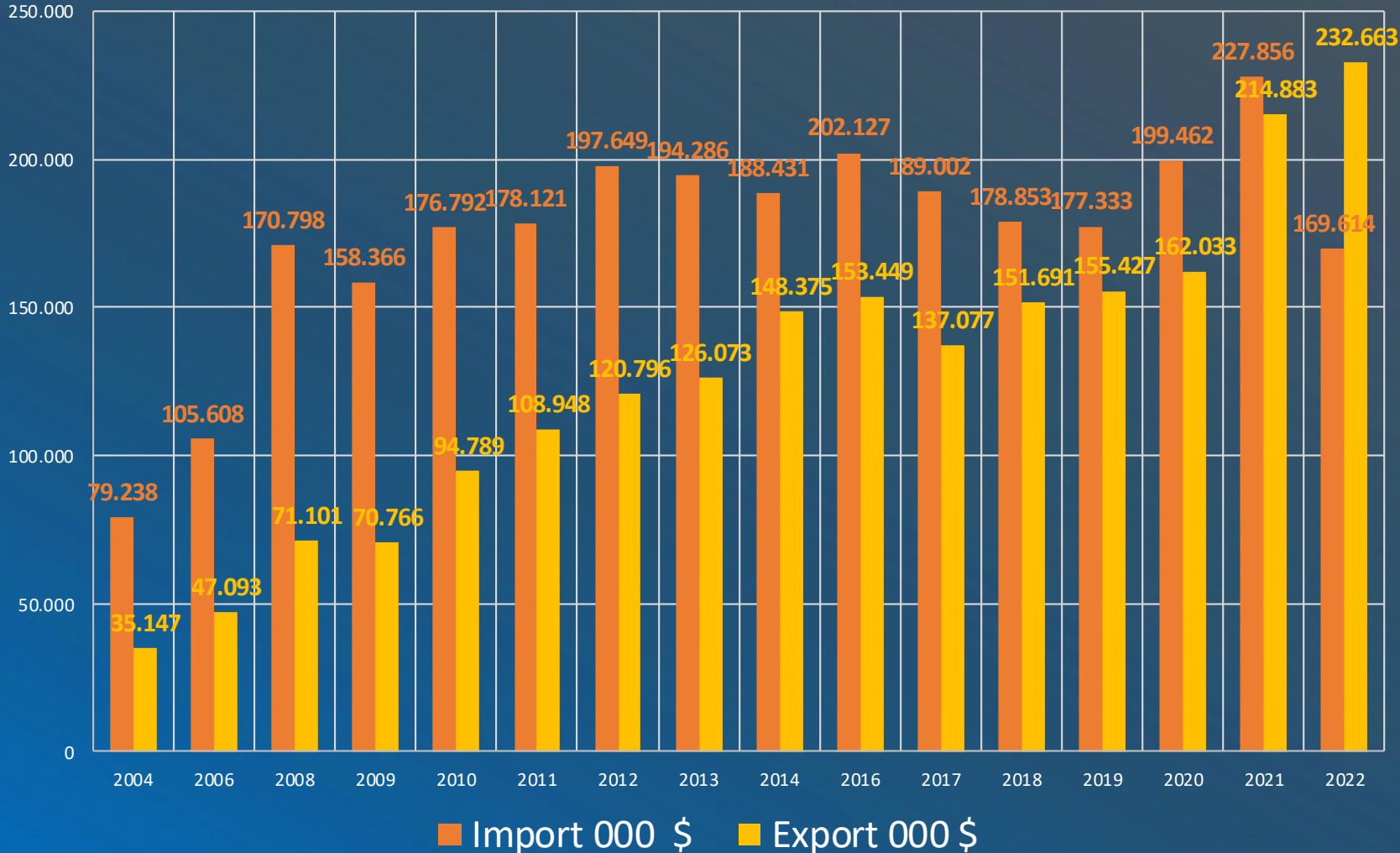




SEED TRADE VALUES IN TÜRKİYE



SEED TRADE VALUES (000 \$)



SEED EXPORT VALUES BY COUNTRY (2022)

COUNTRY	EXPORT (1000 \$)	SHARE (%)
Russia	33.280	14,3
Ukraine	18.966	8,2
Romania	16.199	7,0
Italy	15.344	6,6
Austria	15.168	6,5
Syria	12.953	5,6
Iraq	12.586	5,4
Azerbaijan	11.741	5,0
Kazakhstan	9.668	4,2
France	9.565	4,1
Iran	6.392	2,8
Morocco	3.624	1,6
Jordan	1.307	0,6
Egypt	807	0,4
Pakistan	750	0,3
Other	64.312	28



ORGANIZATION OF SECTOR (UNIONS AND ASSOCIATIONS)

Turkish Seed Association – TÜRKTOB

SUBUNIONS	Members
Seedling – FİDEBİR	211
Plant Breeding – BİSAB	357
Ornamental Plants–SÜSBİR	991
Sapling – FÜAB	965
Seed Industrialists and Producers–TSÜAB	1.084
Seed Distributors – TODAB	7.845
Seed Growers – TYAB	18.893
TOTAL	30.346

NATIONAL PROJECTS

- Seed Development
- Expansion the Use of Native Hybrid Varieties
- Applied Farmer Education Project (UÇEP)
- Impact Analysis of the Supports on Certified Seed Usage and Production

INTERNATIONAL PROJECTS

- Resilience In The Seed Sector With The Rising Of Risks After Covid-19 (COMCEC 2022) (Budget: 43.150\$)
- Improvement of cooperation on seed sector between Türkiye and countries in Central Asia and Caucasus (Türkiye, Azerbaijan, Kazakhstan, and Uzbekistan) (Budget: 190.000\$- 24 months)

COMCEC PROJECT

- The project aimed at sharing of expertise and identification of the best practices for the effective seed management and distribution in selected Countries of COMCEC during the pandemic in order to strengthen the resilience of stakeholders in the agri-food systems against the threats and Covid-19 like crises and to enable food security.

Partners of the Project : Azerbaijan, Malaysia, Morocco, Pakistan, SESRIC and TÜRKİYE

Outputs: A workshop (02-04 November 2022) to share of expertise and identification of the best practices on seed management; A network and communication channel regarding the exchange of experience and technical expertise on how the Covid-19 crisis have been managed in Countries.

Technical Report for Recommendations for the possible food crises and the capacity of the sector for resilience to Covid-19.

CONCLUSION (FUTURE WORK)

- Input supply for optimally priced food production,
- system for seed management/seed quality ,
- access to and supply of seeds at affordable prices,
- **increase the sustainability and resilience of small businesses,**
- promoting quality seed (ISTA, OECD standards)
- **Identification of risks for seed supply, risk evaluation in the sector**
- **Promoting local seeds and commercialization of ancestral (local) seed varieties.**
- **preserving gene resources,**
- Effective monitoring and control mechanism for seed use,
- disseminate the use of certified seeds
- **Increase use of smart agricultural techniques, knowledge and technology,**
- **Digitalization and remote applications/e-government in government affairs (from experience of pandemic)**

SOURCE: UN FOOD SYSTEMSSUMMIT -23 SEPTEMBER 2021 (TÜRKİYE ROAD MAP)
Action Track 5 (AT5): (Build Resilience to Vulnerabilities, Shocks & Stresses)



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THANK YOU...

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