



# Analyses On Selected Countries

Field Visits and Desk Research



COMCEC

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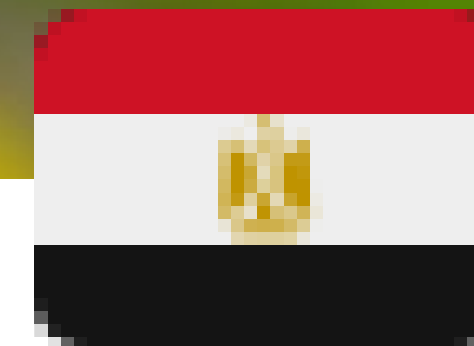
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# Egypt

## Background

The Egyptian civilization was fundamentally established on the fruitful banks of Nile. Egypt which was once the food basket of the Romanian empire, started to be a net importer of agricultural commodities since 1974. Hence, agriculture represents a vital sector for the Egyptian state with a population over 110 Million. Egypt`s population growth has increased pressure on natural resources, including land and water. This part of the study reviews the challenges faced by the Egyptian state in the field of agriculture and the programs planned by the Egyptian governments to enhance the agricultural productivity in Egypt.

# Facts about Agriculture

## Egypt



01

### Employment

The percentage of workers in the agricultural sector is about 25% of the total workforce in the country.

02

### IFAD Ties

Egypt is IFAD's largest recipient of financial assistance in the Near East and North Africa region.

03

### Agricultural Land

The total agricultural area of Egypt is about 9.7 million acres, while the total cropped area of Egypt is about 17.5 million acres.

04

### Growth

Although its contribution to the GDP is gradually diminishing, the agricultural sector in Egypt contributes about 17% to merchandise exports abroad, and the agricultural sector's contribution to the gross domestic product is about 15% .

# Challenges Faced in Agriculture

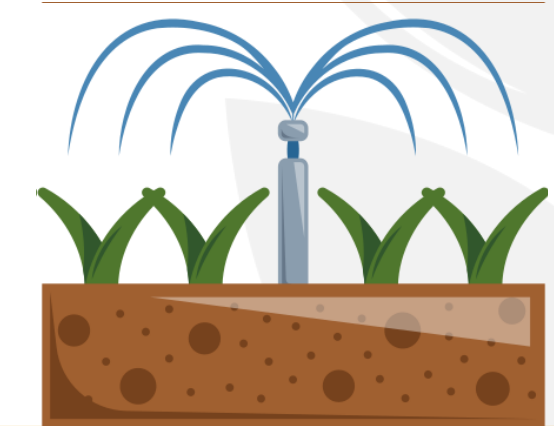
## Egypt



An abolition of subsidies on agricultural loans and hence the increase in interest rates on its agricultural loans has a negative effect.



A decline in roles of cooperatives, which led to high production costs in addition to the cancellation of the agricultural cropping system, which led to increase the size of the food gap in the main crops which has to be covered by imports.

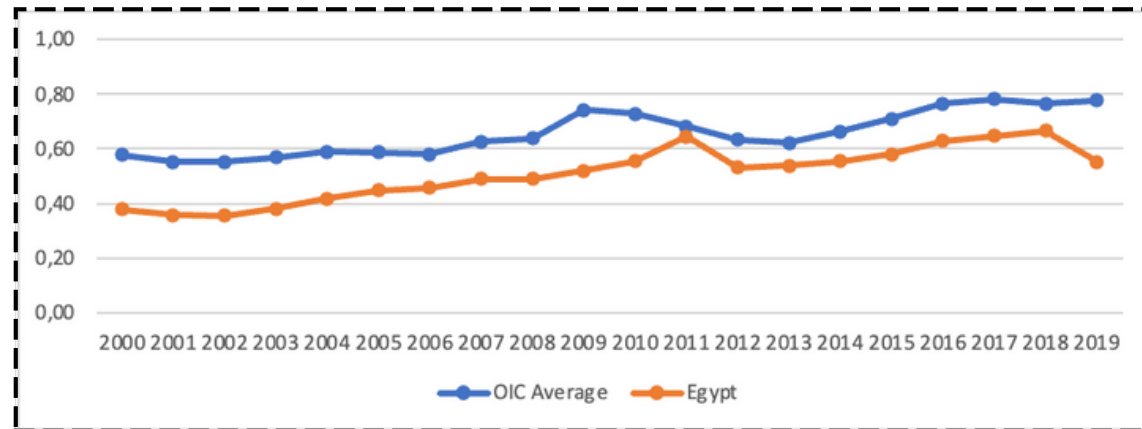


The fragmentation of agricultural holdings, and the dominance of dwarf holdings pose risk as negligence in the maintenance of agricultural economic resources through land clearing along with poor service operations and wasteful irrigation and poor drainage may be challenging.



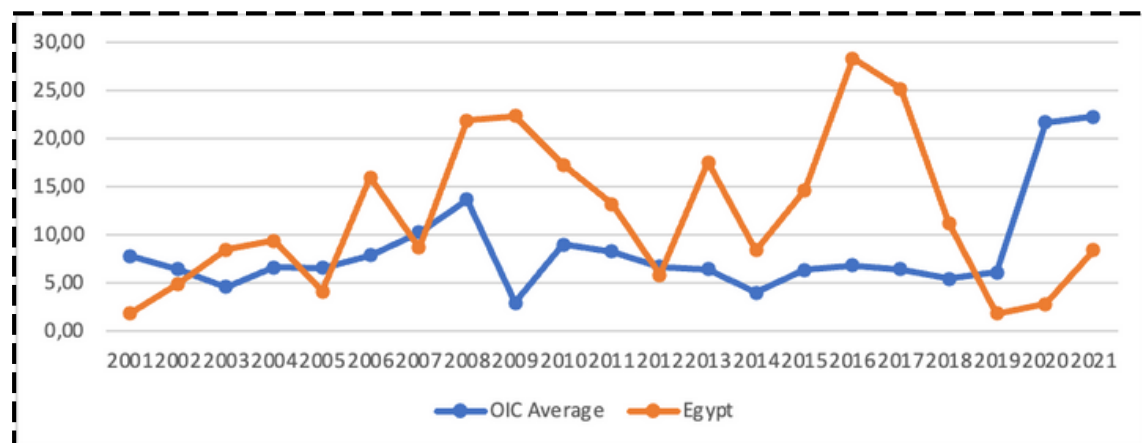
# Highlights from the Data

## Egypt



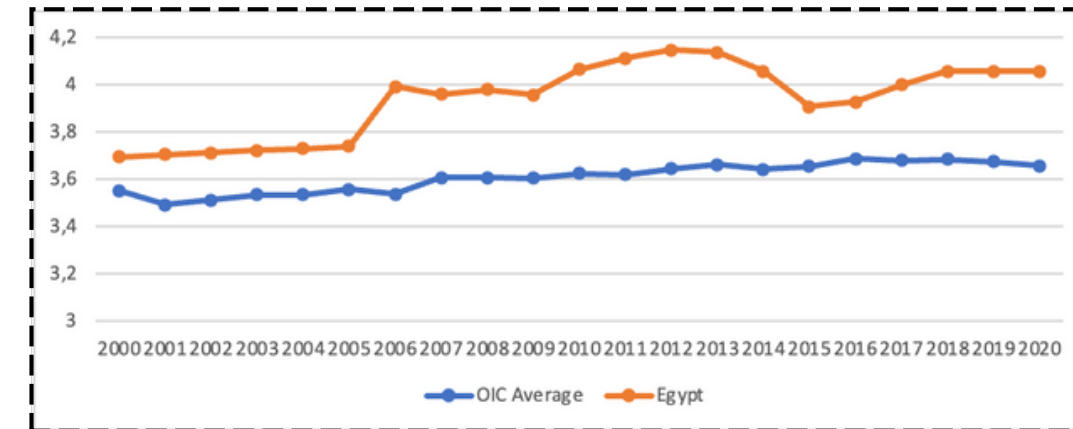
### Water Use Efficiency

Looking at the change in the ratio of agricultural value added to water use volume, which is defined as water use efficiency, it is observed that Egypt has been consistently below the average of OIC countries throughout the 2000-2020 period.



### Food Price Index

Food price index demonstrates a rather unstable movement in Egypt. Since 2002, food prices have been consistently above the OIC average, while they have fallen below the OIC average since 2018.



### Pesticide Use

For the period 2000-2020, Egypt's pesticide use has consistently exceeded the OIC average. There has been a sharp increase especially since 2005, while the rate of increase in pesticide use has continuously accelerated despite the decline in the 2013-2015 period.





# Kyrgyzstan

## Background

Kyrgyzstan, whose capital is Bishkek is a Central Asian country with a population of 6,803,000 according to 2022 data. Located on an area of approximately 200 thousand km<sup>2</sup>, the country ranks 23rd in Asia and 87th in the world in terms of total area. Located in a mountainous region, the country is landlocked and has land borders with China, Kazakhstan, Tajikistan and Uzbekistan.

# Facts about Agriculture

## Kyrgyzstan



01

### Agricultural Structure

Small-scale farms contribute to almost all agricultural production, while livestock is the main source of household income.

02

### Livestock Breeding

Livestock breeding is dominated by cattle, ovine and poultry, but breeding of horses, camels, donkeys, rabbits and beekeeping are also practiced.

03

### Agricultural Products

Most of the agricultural products grown are cereals (47.5%), followed by legumes. Among cereals, wheat and barley are the main crops.

04

### Arable Land

The land available for agriculture is 1,286 thousand hectares, most of which is utilized by small farmers. In 2023, there were 42.6 thousand hectares of arable land, a decrease compared to last year.

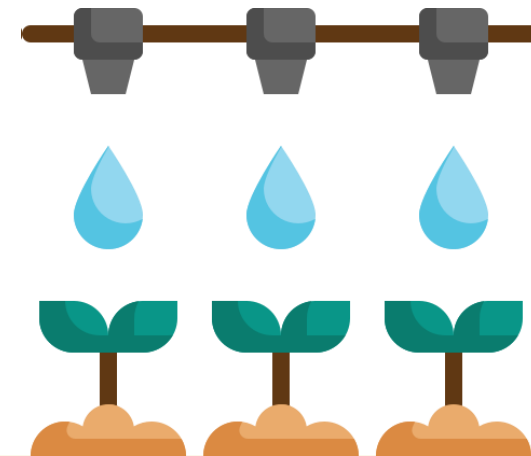


# Challenges Faced in Agriculture

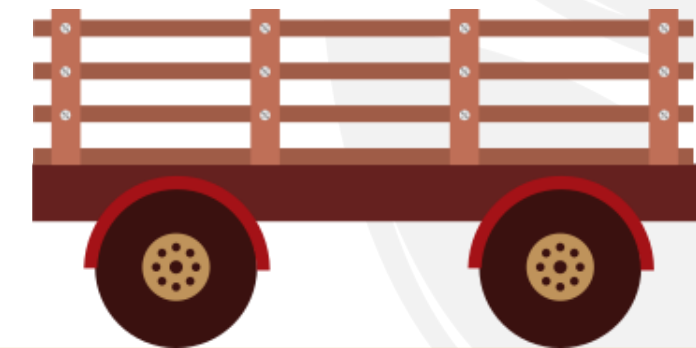
## Kyrgyzstan



Energy needs in Kyrgyzstan are largely met through fossil fuels and the use of biofuels remains limited.



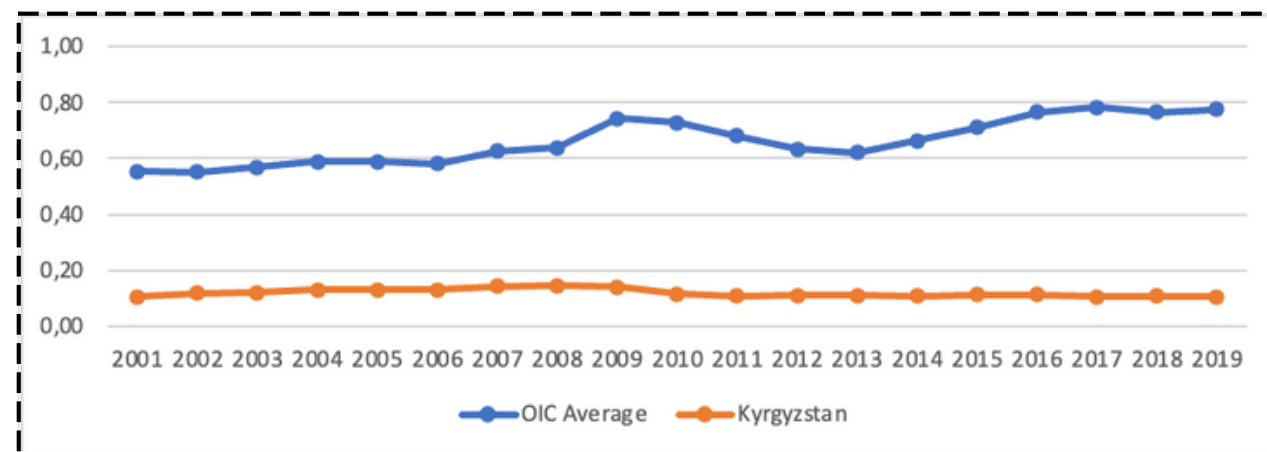
Salinization and waterlogging inefficiencies in the irrigation network, lack of moisture in the soil, remote and stony areas, settlement expansion, lack of productive seeds, exposure to natural disasters hamper agricultural production.



Access to financing and social networks that can disseminate knowledge in the sector are limited combined with the terrain which requires planned effort regarding logistic infrastructure.

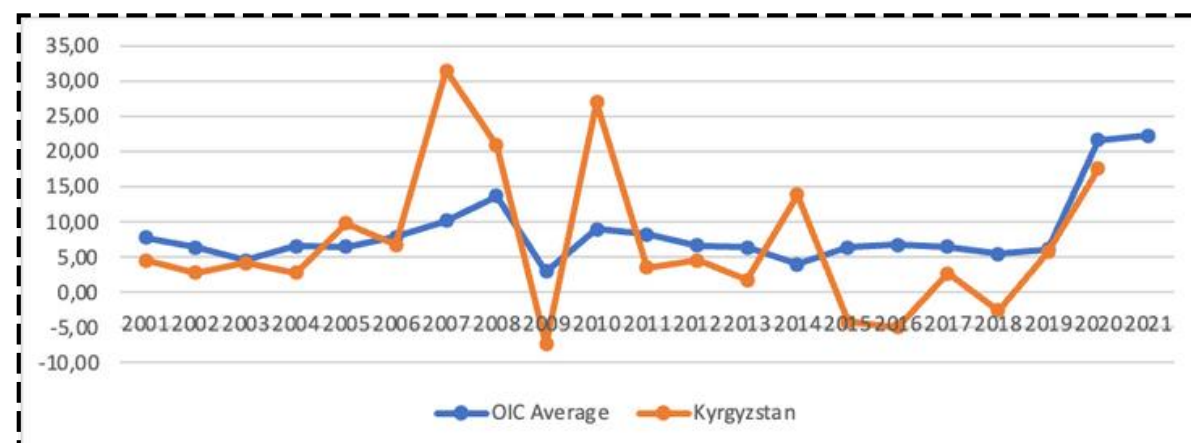
# Highlights from the Data

## Kyrgyzstan



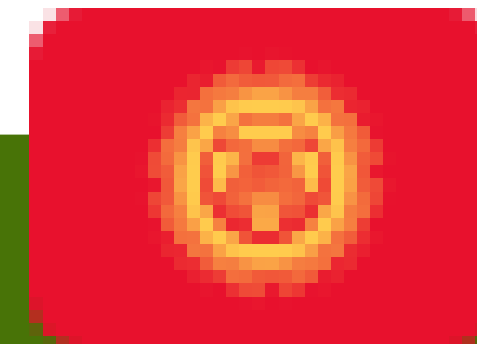
### *Water Use Efficiency*

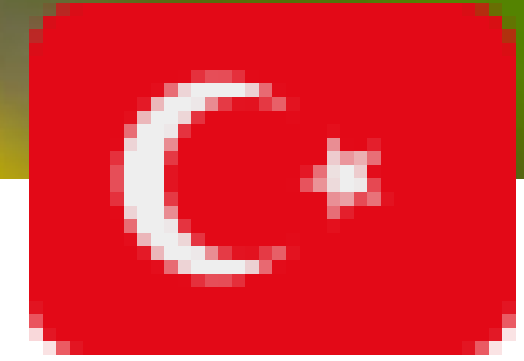
Kyrgyzstan is well below the average of OIC members when it comes to water use efficiency which shows there is an area of improvement from a sustainability perspective.



### *Food Price Index*

Food price index follows a volatile route during certain periods but stays close to the OIC average overall.





# Türkiye

## Background

In Türkiye, food prices which have been highly volatile and on the rise since the second half of the 2000s have negatively affected low-income groups along with price increases of agricultural products. In this context, population growth, rapid urbanization and climate change can be regarded as possible sources of instability. Thus, increasing demand for water resources and the protection of agricultural areas have become critical for food security. Food prices, which have been hovering above world average, can be achieved through increasing productivity while water and land maintain their importance.

# Facts about Agriculture

Türkiye



01

## Employment

Roughly 4% of permanently employed and 13% of seasonal employments are in agricultural sector.

02

## Growth

Agriculture sector has an average annual growth rate of 3.9% and a share of 24.6% from total employment.

03

## Use of Fertilizers

Fertilizer use decreased by 13.2% between 2006-2011 although it increased by 33.2% between 2006-2016.

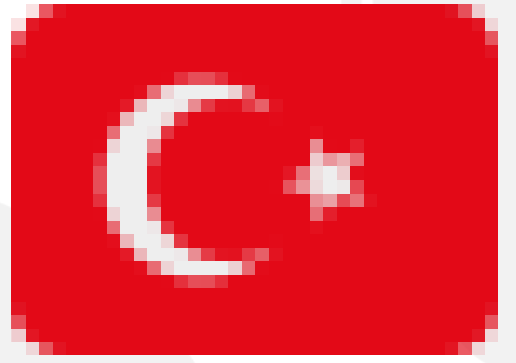
04

## Irrigation

27.8% of cultivated land is irrigated.

# Challenges Faced in Agriculture

## Türkiye



The fragmentation of agricultural lands through inheritance leads to a reduction in the size of holdings and thus to a decrease in agricultural productivity. The shrinkage of agricultural holdings causes significant problems of economies of scale and production tends towards decreasing yields.

Excessive price hikes in basic production inputs such as fertilizers, pesticides, seeds, agricultural machinery and diesel fuel have significantly reduced the profits of agricultural enterprises. This has led to losses for some agricultural businesses.

Although the use of agricultural machinery in Türkiye has shown significant improvements over the years, the contribution to agricultural production and productivity remains low compared to the volume growth when evaluated together with the average age, technological level and the size of the area suitable for machinery use.

# Challenges Faced in Agriculture

## Türkiye



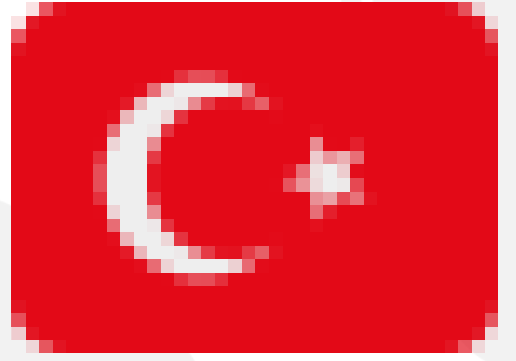
The desired level of farmer training and the use of modern agricultural technologies has not been achieved. For these reasons, farmers' knowledge and capital accumulation have been insufficient. Small-scale agricultural enterprises do not have the financial resources required for modern agricultural tools and equipment and modern agricultural production techniques.



Considering that approximately 70% of agricultural holdings combine animal and crop production, specialization is not widespread in agricultural enterprises.

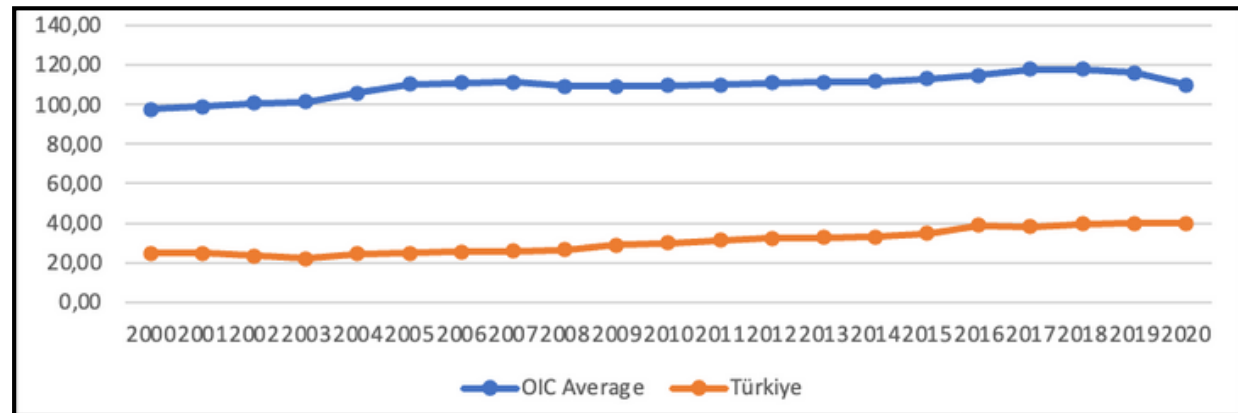


One of the most important problems of Türkiye's agricultural sector is the smaller average size of agricultural land compared to developed countries and the existence of unemployment in rural areas.



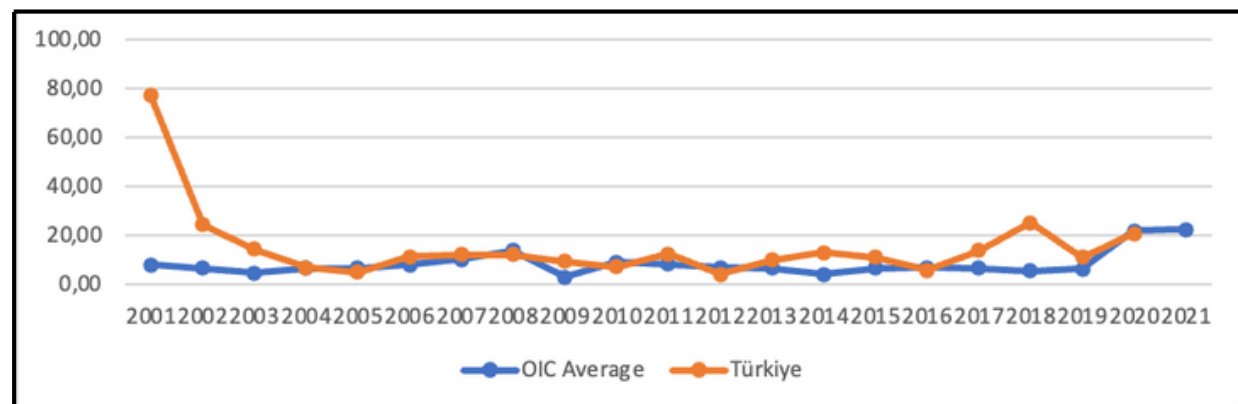
# Highlights from the Data

## Türkiye



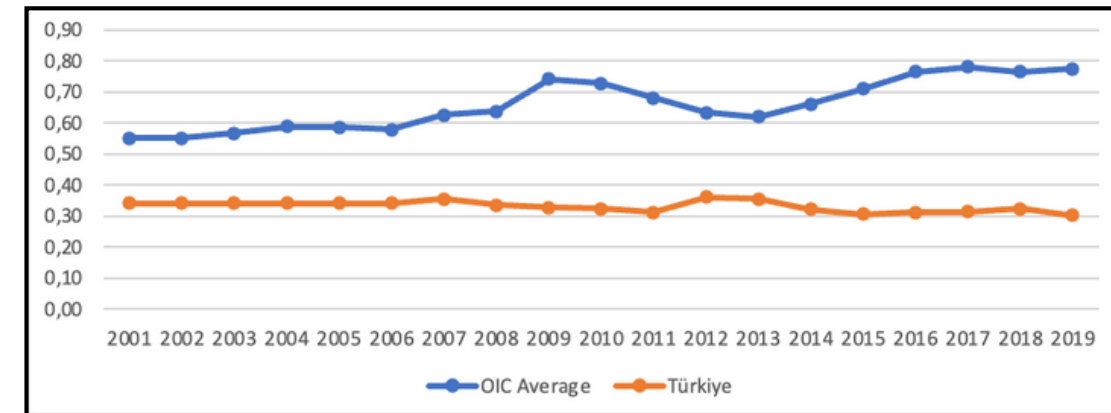
### Level of Water Stress

Türkiye appears to be a low-stress country with a water stress level exceeding 40 percent. The fact that the water stress level, which was about 20 percent at the beginning of the period, has doubled in 20 years is observed as an important difference.



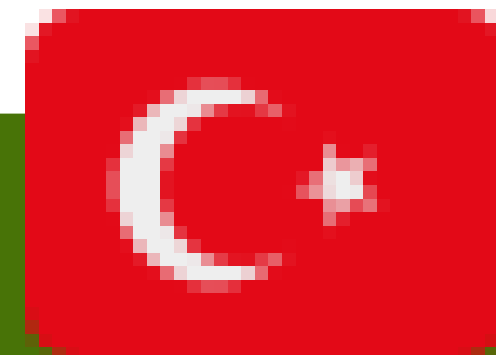
### Food Price Index

Food price index shows that food prices in Türkiye, which declined rapidly between 2001 and 2003, have followed a course close to the OIC average except for 2014 and 2018.



### Water Use Efficiency

When Türkiye is evaluated in terms of water use efficiency, it is seen that it has a very low level of efficiency compared to the OIC average. Especially in the 2015-2019 period, Türkiye's water use efficiency level reached the lowest level of the last 20 years.





# The Netherlands

## Background

The agricultural sector in the Netherlands is the most productive and productive per unit of land in the European Union (EU). However, ammonia emissions, nitrogen and phosphorus excesses, and pesticide use per hectare of agricultural land are also among the highest in the EU. While agriculture which is a productive sector in the Netherlands has an important share in national income, it is under the pressure of important environmental problems in terms of input use. Despite successful policies and farm measures to reduce this pollution, agriculture still poses the greatest environmental pressure on biodiversity.



# Facts about Agriculture

## The Netherlands



01

### Economic Importance

The contribution of agricultural production to GDP is 1.79% on average. In terms of quantity, exports cover imports in the foreign trade of the country as of 2004.

02

### Employment

In the Netherlands, agricultural employment accounts for 2.78% of total employment and agricultural employment is on a downward trend.

03

### Agricultural Output

The amount of output per agricultural employment increased by 75% from US\$ 41,887 in 2000 to US\$ 53,391 in 2020.

04

### Cooperation

The stakeholders of the agricultural sector - primary agricultural producers, suppliers, banks, food manufacturing companies, exporters, catering companies and restaurants - are in close cooperation with each other.

# Challenges Faced in Agriculture

## The Netherlands



In order to obtain maximum benefit, raw materials obtained at minimum cost are processed with maximum efficiency. Dependence on weather conditions, animal and plant diseases are still a major risk and this has a direct impact on producers' incomes. Individual small-scale producers can be powerless in the face of large purchasers.



Fishing is part of the cultural history of the Netherlands and the main source of income for some villages. However, the fishing grounds are being devoted to sustainable energy and nature conservation measures and their size is gradually decreasing.



Although the government has concrete targets to reduce greenhouse gas emissions by 3.5 megatons by 2030 according to the CAP and the Paris Framework Agreement, industrial livestock farming has been increasing in the country.

