

“Food Security Issues as a Key Element in the Solution of Socio-Economic Problems of the Country”

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Sector Context

- Largest share of the population over 70% residing in the rural area, direct dependence upon agricultural sector
- Key sector allowing massive rural income generation
- Sector employing over 61 % of population
- Competitive advantages due to agro-climatic conditions (early season, peculiar taste due to prevalence of sunny weather, non-excessive use of chemicals)
- High potential of Tajik agricultural produce to take premium niche markets
- Enhanced production of key food items to saturate the local market (cereal, starch, oil, protein)

Overview of agricultural production in Tajikistan

(thousand tons)

Crop	2000	2005	2010	2017	Comparative assessment for 2017 and 2000	
					(+;-)	%
Cereals	550	935	1261	1447	897	1,6 times
Potato	303	555	760	783	480	2,6 times
Vegetables	355	719	1143	1859	1504	4,2 times
Melons	95	170	482	631	536	5,6 times
Fruit	170	148	225	405	176	2,4 times
Grapes	110	91	124	228	118	2,0 times
Meat	59	108	143	249	190	4,2 times
Milk	310	533	661	950	640	3,0 times
Eggs (million items)	24	99	232	341	317	14,2 times

General agricultural production per capita population in the Republic of Tajikistan during the period 1991-2017

(kg per capita)

Crop	1991	1995	2000	2005	2010	2011	2012	2013	2014	2015	2016	2017
Cereal	54,3	42,2	89,8	133,8	165,7	142,8	154,1	172,5	159,6	165,8	164,2	165,6
Potato	32,3	18,9	49,5	80,2	100,9	113,3	123,9	138,2	103,4	105,0	102,7	89,5
Vegetables	112,1	83,3	57,9	103,8	151,7	163,1	167,8	184,6	187,6	197,2	200,0	212,6
Melons	31,2	19,7	15,6	24,6	64,1	55,6	58,1	61,3	66,1	70,1	67,9	72,2
Fruit	31,6	25,2	27,7	21,4	29,9	34,1	39,2	40,7	41,3	35,4	41,6	46,3
Grapes	21,6	16,3	18,0	13,1	16,5	20,3	20,9	21,7	22,9	24,1	24,6	26,6
Meat	6,9	8,7	4,8	7,8	9,5	9,9	10,1	10,7	12,0	13,2	26,7	28,4
Milk	104,9	64,7	50,6	77,2	87,8	91,4	97,3	102,6	103,5	105,2	105,0	108,6
Eggs, items	81,1	8,4	3,8	14,3	30,8	33,4	36,5	42,6	42,4	42,3	38,6	39,0

Achievements

- Successful land reform 1996-2012 implementation. As a result 171'351 farms of various ownership forms established
- Share of agriculture in GDP increased by 20% within the period 2000-2017 (24.5 bln. TJS = 270 MUSD)
- Exploration of new lands, expanding the cultivated areas, including those under key food security crops. Over last 11 years 74'120 ha of new orchards and 8'504 ha vineyards were established
- Tajik commodities are being exported to external markets: CIS, Europe, Asia, Middle East, America/Canada
- Significant improvement of food processing, increase in number and quality of processing enterprises for the local market
- Elaboration and implementation of corresponding sector policies and strategies: MtDS, Ag. Reform, Import Substitution
- Commitment to institutional reform aimed at facilitating the development of the private sector in agriculture (FSC is established, priorities for the institutional reform of MoA are elaborated)

Challenges

- Fragmented production and lack of knowledge of management farms, also lack online platforms for selling and buying inputs and agricultural products
- Limited know-how and access to contemporary technologies
- Underdeveloped access to finance
- Slow development of logistics/transport infrastructure, weak consolidation and post harvest management
- Insufficient introduction of production standards: Global Gap, Bio, Fair Trade affecting marketability of Tajik commodities
- Insufficient coordination and collaboration between the stakeholders

Priorities/Food Security

1. Increase agriculture production
2. Reduce import of food supplies
3. Increase export volume of national production to regional markets
4. Increase agriculture sector contribution to GDP
5. Ensure more Tajikistan's food processing companies are provided raw material from national production
6. Reclamation of additional 25,000 ha agriculture land

Priorities/Competitiveness

1. Enhance value addition in the country
2. Deploy implementation and certification of production in line with standards (Global GAP, Bio, etc)
3. Ensure consolidation of production to achieve economy of scale
4. Facilitate access to premium/niche markets
5. Attract investments for the development corresponding post harvest, logistic infrastructure
6. Promote Tajik brands on different fairs/exhibitions/platforms

Next Steps

- Initiate introduction of production standards in the modality of 200 days of reforms
- Strengthen the involvement of the private sector
- Elaborate concise road maps for the implementation of the reform and track down implementation
- Develop and introduce the FSM system with accordance of the international standards and regular monitoring of the food security situation;

Consolidation of efforts

- Re-launch regular dialogue platform aimed at strengthening cooperation and communication
- Finalize elaboration of the action plans as per identified priorities

**Thank you for
attention!**