REGIONAL AGRICULTURE PROFILE (RAP)
TURKEY HUB
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INTRODUCTION

The Islamic Development Bank (IsDB) Regional Hub in Turkey (RH-TH), based in Ankara, Turkey was established in 2018.¹ The RH is responsible for the Bank’s operations in Albania, Azerbaijan, and Turkey.

¹ IsDB opened its office in 2014 as Country Gateway Office.
**IsDB GROUP TOTAL NET APPROVALS 1974-2019 (MILLION US$)**

**TOTAL**

**US$ 13,458.0**

- **5,322.4** (39.5%)
- **4,558.3** (33.9%)
- **660.4** (4.9%)
- **2,916.9** (21.7%)

**OTHER FUNDS**

**US$ 2,916.9**

- **Antonieta Tschofenig**
- **Marina D’Ambrosia**
About 50% of the total land area is agricultural land.
TURKEY HUB
TOTAL COUNTRIES AREA (’000 HA)
90,070
2018

TOTAL POPULATION (’000)
95,128
2018

GDP PER CAPITA ((2018 CURRENT PRICES, US$))
6,453
2018
IsDB Group Approvals by Sector 1974-2019 (Million US$)

- **Others (Finance, Trade, ICT etc)**: $4,704 (34.9%)
- **Transport & Real Estate**: $1,746 (12.9%)
- **Agriculture**: $1,148 (8.5%)
- **Energy, Mining & Industry**: $4,753.1 (35.5%)
- **Education, Health & Social Services**: $1,215 (9.0%)
ECONOMIC RELEVANCE OF AGRICULTURE SECTOR

Since 1990s, the economies of Turkey Hub counties have diversified, resulting in boom in other sectors, particularly service sector. The contribution of agriculture sector to the economy as well as employment including % female employment in the sector has declined over past two decades.

**GDP (BILLION US$)**

<table>
<thead>
<tr>
<th>Year</th>
<th>GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010-14</td>
<td>324.2</td>
</tr>
<tr>
<td>2015-19</td>
<td>403.2</td>
</tr>
</tbody>
</table>

**% AGRICULTURE TO GDP**

<table>
<thead>
<tr>
<th>Year</th>
<th>% Agriculture to GDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010-14</td>
<td>10.6</td>
</tr>
<tr>
<td>2015-19</td>
<td>10.4</td>
</tr>
</tbody>
</table>

**% OF AGRIC. EMPLOYMENT TO TOTAL EMPLOYMENT**

<table>
<thead>
<tr>
<th>Year</th>
<th>% of Agric. Employment to Total Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010-14</td>
<td>34.9</td>
</tr>
<tr>
<td>2015-19</td>
<td>31.6</td>
</tr>
</tbody>
</table>

**% OF FEMALE EMPLOYMENT IN AGRIC. TO FEMALE EMPLOYMENT**

<table>
<thead>
<tr>
<th>Year</th>
<th>% of Female Employment in Agric. to Female Employment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2010-14</td>
<td>44.7</td>
</tr>
<tr>
<td>2015-19</td>
<td>38.2</td>
</tr>
</tbody>
</table>
AGRICULTURE AND LAND USE

Land area consists of crop land comprising arable land and land under permanent crops including permanent meadows, forest area and other land. About 50% of the total land area is agricultural land, of which more than 23% is permanent meadows and pastures. The land area equipped for irrigation, on average, stayed stable by 2.3 million ha over two decades.

**LAND AREA (’000 HA)**

- **AGRICULTURAL LAND**: 50.22%
- **FOREST LAND**: 19.19%
- **OTHER LAND**: 30.59%

**WATER USAGE (% OF TOTAL WATER USAGE)**

- **AGRICULTURAL WATER USAGE**: 79.36%
- **INDUSTRIAL WATER USAGE**: 13.93%
- **FOREST LAND**: 19.19%

**LAND AREA EQUIPPED FOR IRRIGATION (%)**

- 2010-14: 15.8
- 2015-18: 15.9
FOOD SECURITY AND NUTRITION

Wheat is a major staple crop in TH followed by potatoes. Yields of wheat and potatoes significantly increased over the past two decades. Livestock and fisheries (including aquaculture) play a vital role in the development of TH’s economy and important for the country’s food and nutrition security.

<table>
<thead>
<tr>
<th></th>
<th>2000-09</th>
<th>2010-18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wheat Yield (Tons/ha)</td>
<td>2.71</td>
<td>3.15</td>
</tr>
<tr>
<td>Potatoes Yield (Tons/ha)</td>
<td>19.22</td>
<td>23.65</td>
</tr>
<tr>
<td>Fertilizer (Kg/ha)</td>
<td>65.11</td>
<td>83.85</td>
</tr>
<tr>
<td>Cattle (MILLION head)</td>
<td>4.40</td>
<td>5.40</td>
</tr>
<tr>
<td>Goats and Sheep (MILLION head)</td>
<td>14.30</td>
<td>16.1</td>
</tr>
<tr>
<td>Fisheries (TON)</td>
<td>213.20</td>
<td>214.30</td>
</tr>
</tbody>
</table>
Overall food security has significantly improved over the past decade. The Global Food Security Index in TH increased from 58 in 2010-18 to 67.3 in 2019. While Global Hunger Index (GHI) declined from 10.9 in 2010 to 6.3 during the same period.
COUNTRIES IN TURKEY HUB ARE HIGHLY VULNERABLE TO CLIMATE CHANGE AND ARE PARTICULARLY AFFECTED BY FLOODING AND DROUGHT
CLIMATE CHANGE

The countries in TH is highly vulnerable to climate change and agriculture sector which faces threat particularly in areas is affected by flooding, and drought. It is predicted that average annual temperatures will increase by 2.5°C by 2050 if no measures are taken.

CHANGES IN TEMPERATURE (DEGREES CELSIUS)

- TURKEY REGION
  - 1990-94: 0.44°
  - 1995-99: 0.67°
  - 2000-04: 1.11°
  - 2005-09: 0.81°
  - 2010-14: 1.34°
  - 2015-18: 1.11°

IT IS PREDICTED THAT AVERAGE ANNUAL TEMPERATURES WILL INCREASE BY 2.5° IF NO MEASURES ARE TAKEN
PROGRESS TOWARDS THE SDGs

AGRICULTURE-RELATED SDG SCORES | TURKEY HUB vs IsDB 57

1. Zero Hunger
   HUB: 96.8
   IsDB 57: 63.8

2. Good Health & Well-being
   HUB: 65.7
   IsDB 57: 45.7

3. Quality Education
   HUB: 59.9
   IsDB 57: 66.1

4. Gender Equality
   HUB: 38.8
   IsDB 57: 26.2

5. Peace & Justice
   HUB: 56.6
   IsDB 57: 60.5

6. Clean Water & Sanitation
   HUB: 74.2
   IsDB 57: 84.3

7. Life on Land
   HUB: 37.9
   IsDB 57: 50.2

8. Sustainable Cities
   HUB: 63.9
   IsDB 57: 59.2

9. Life below Water
   HUB: 68.8
   IsDB 57: 60.5

Overall

HUB: 81.5
IsDB 57: 87.7
TURKEY HUB HAS ACHIEVED THE HIGHEST PROGRESS IN NO POVERTY (SDG 1) WITH A SCORE OF 96.8%
IsDB FOOTPRINT IN THE REGION

IsDB AGRICULTURAL FINANCING | 1974-2019

COUNTRY OPERATIONS
ACTIVE & COMPLETED (PROJECT NO AND USS)

REGIONAL HUB OPERATIONS
ACTIVE & COMPLETED (PROJECT NO AND USS)

PROJECTS (NO.)

AMOUNT (US$ MILL.)

AZERBAIJAN
ALBANIA
TURKEY

PROJECTS (NO.)

AMOUNT (US$ MILL.)

ACTIVE
COMPLETED

AZERBAIJAN
ALBANIA
TURKEY

INTEGRATED RURAL DEVELOPMENT
70.7%

MICROFINANCE
3.4%

IRRIGATION AND DRAINAGE
25.9%
IsDB ONGOING INVESTMENT & KEY EXPECTED OUTPUT IN TURKEY HUB

- Construction of Irrigation and Drainage Canals (km): 1,698
- Water User Associations Offices Constructed (no): 17
- Green House Built (ha): 50
- Farmers Trained (no): 150

TOTAL PROJECT INVESTMENT: US$ 66,390m
**IsDB OUTLOOK IN THE REGION**

IsDB new business model, which is based on Global Value Chain, aims to boost the competitiveness of member countries. IsDB aims to achieve this goal by supporting member countries develop strategic industries in which they have comparative advantage, creating local supply chains, and integrating them with Global Value Chains. This new business model will be implemented through GVC based Member Country Partnership Strategy (MCPS). The Bank has launched the preparation of Turkey MCPS and will prepare Albania and Azerbaijan MCPS in 2022 and are expected to focus on the following thematic areas:

- Irrigation and water resources
- Crop and livestock (including fisheries) production/productivity
- Institutional capacity development for farmers’ organizations
- Islamic Microfinance
- Inclusive value chain development

**DATA SOURCES**

IsDB project data is taken from the existing IsDB Database, while most other indicators are calculated based on the data available from FAOSTAT (http://www.fao.org/faostat/en/#data), except for the following indicators:

(i) National Rainfall Index and total water withdrawal, agricultural water withdrawal and industrial water withdrawal as well as temperature change are taken from FAO AQUASTAT (www.fao.org/nr/water/aquastat/data/query/index.html?lang=en)


(iv) SDG Index Scores are taken and calculated from the 2019 publication of Bertelsmann Stiftung and Sustainable Development Solutions Network (SDSN) titled Sustainable Development Report 2019: Transformations to Achieve the Sustainable Development Goals. Some of the Scores are taken and calculated from the 2019 IsDB Publication titled Reaching the SDGs: Progress of the IsDB Member Countries.

(v) Percentage agriculture GDP to total GDP is from the World Bank (https://data.worldbank.org/). Agriculture includes agriculture, forestry and fishing.

(vi) Percentage of agricultural employment to total employment is from the World Bank (https://data.worldbank.org/).

(vii) Percentage of female employment in agriculture to female employment is from the World Bank (https://data.worldbank.org/).

(viii) Agricultural productivity is from the World Bank (https://data.worldbank.org/).

Note: The figures for the specified period provided in this RAP are based on simple average of available data across the years and countries in the region (Hub) during the period. In some cases, the figures for the Hub may be based only on some years during the period and/or only on some countries in the Hub.
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