



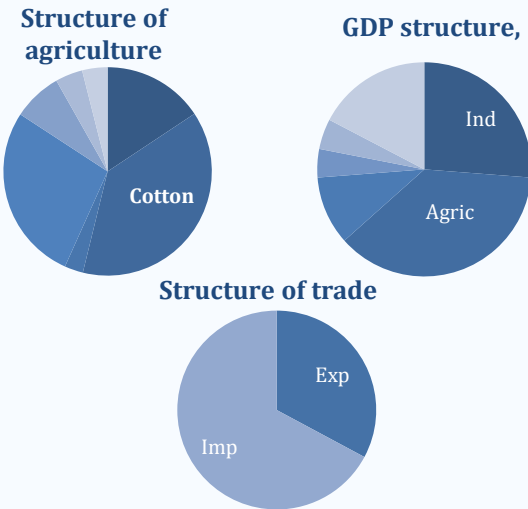
Uzbekistan – 2030: Rethinking the approach to formulating food security strategy

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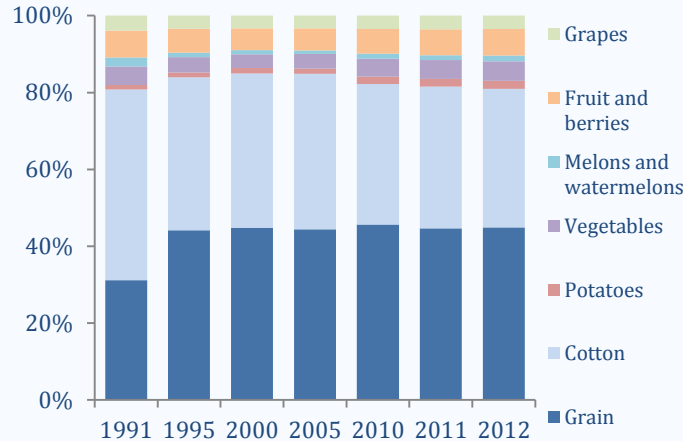
**International Conference on Agriculture & Food Systems,
Climate Change and Nutrition in CIS Countries
February 11, 2015, Moscow, Russia**

Uzbekistan's approach to Food Security 1991-2014

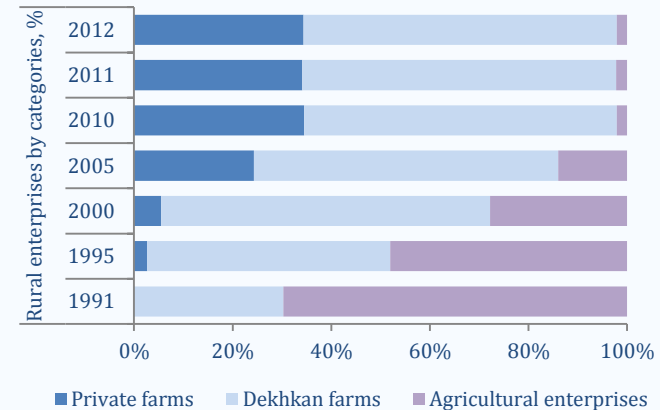
Starting position in 1991



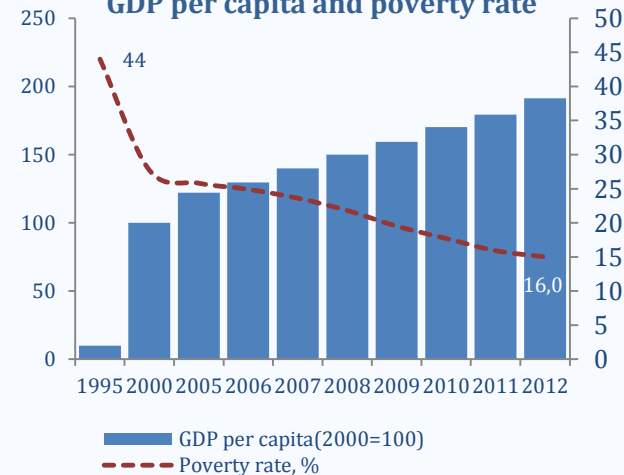
Restructuring of the agricultural output mix:
structure of the sown area by types of crops(%)



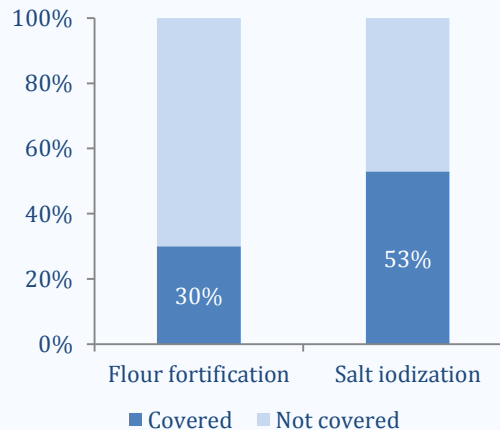
Institutional reforms in agriculture: Structure
of rural enterprises by categories, %



Welfare improvement policy:
GDP per capita and poverty rate



National nutrition policy:
flour fortification & salt iodization



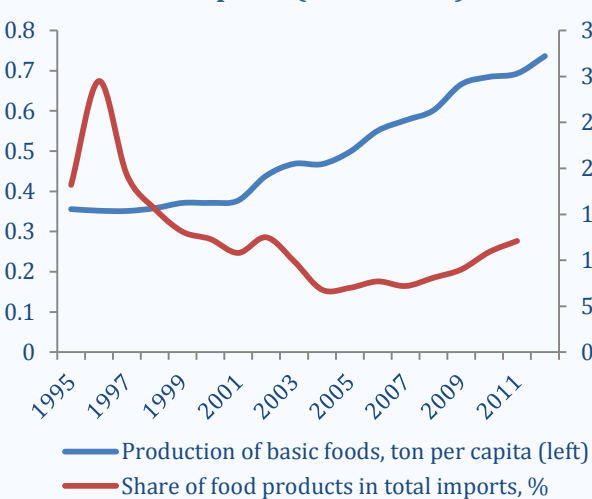
- Starting position in 1991:**
- Uzbekistan – a net importer of basic foods;
 - National agriculture heavily specialized in cotton-growing;
 - Hard currency revenues and reserves insufficient to close gap by imports;
 - Importance to strike a delicate balance to achieve a number of development goals
- **Food Security – one of the Priority issues for Government**
- **Government takes a pro-active role in the food policy regulation process**

Policies employed:

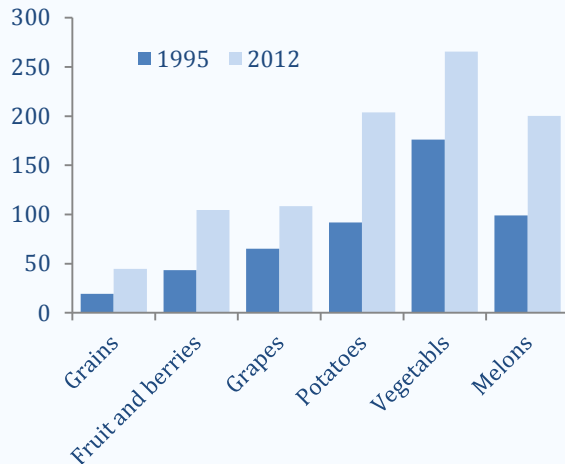
- Restructuring of the agricultural output mix;
- Institutional reforms in agriculture;
- Welfare improvement policies (price controls, social assistance to the target groups;)
- National nutrition policy.

Uzbekistan's Food Policy: Main Outcomes

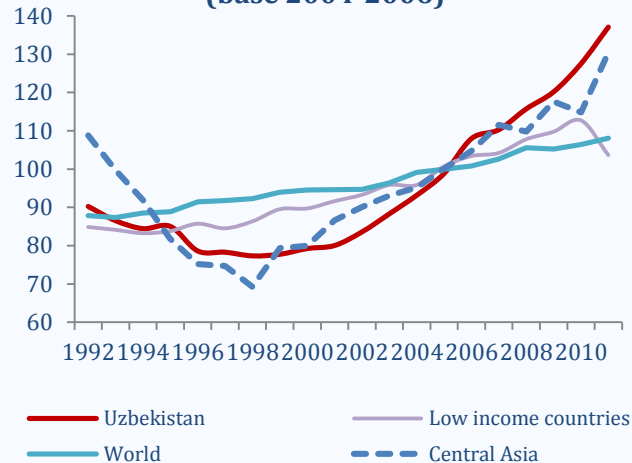
Per capita production of basic foods VS food imports (1995-2012)



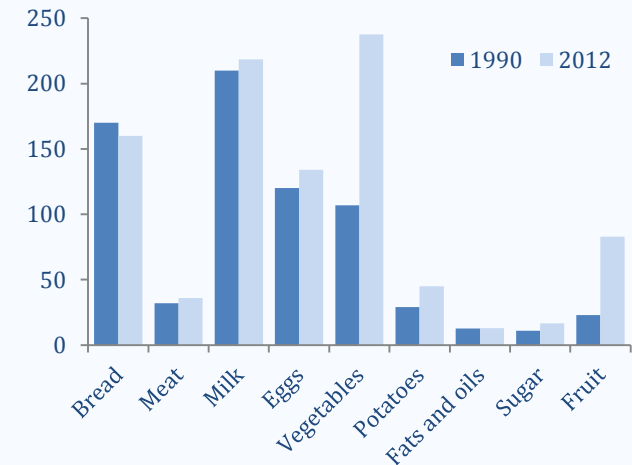
Crop yield : 1995 VS 2012



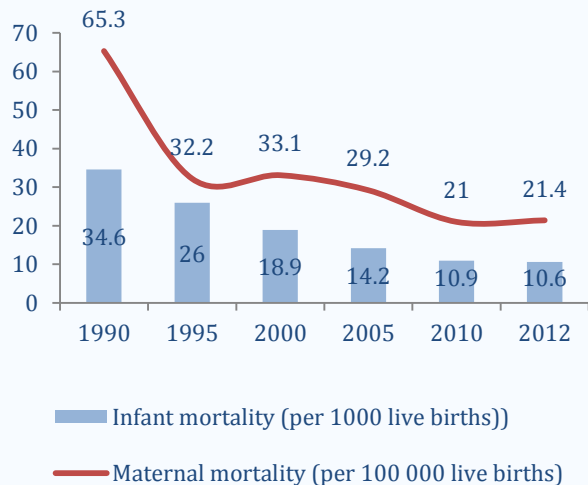
Gross per capita food production index: Uzbekistan VS Other economies (base 2004-2006)



Consumption of basic foods 1990 VS 2012 (kg/ year)



Maternal and infant mortality (1990-2012)



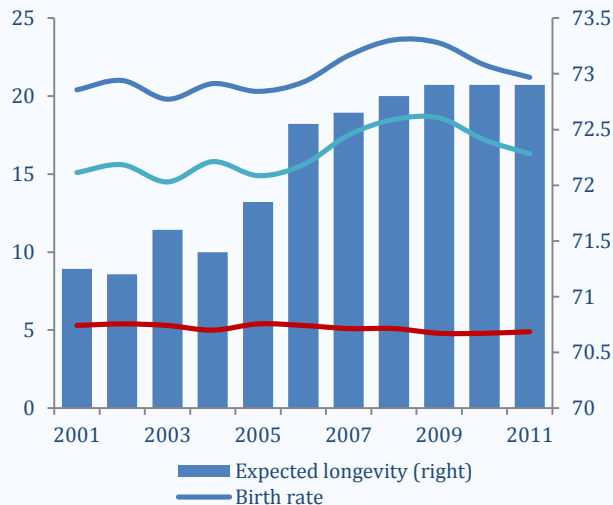
Outcomes:

- Grain independence as well as the self-sufficiency in basic foods is attained;
- Steep rise in crop yield and output of meat, eggs, potatoes, fruit & vegetables;
- Improved access to the basic foods;
- Improved quality of nutrition, decline in child mortality and improvement in anthropometric indicators;
- → Uzbekistan's Food Policy proved its effectiveness and averted the threats to the nation's food security;
- → Elements of Uzbekistan's Food policy are now widely recognized and considered as internationally accepted best practices

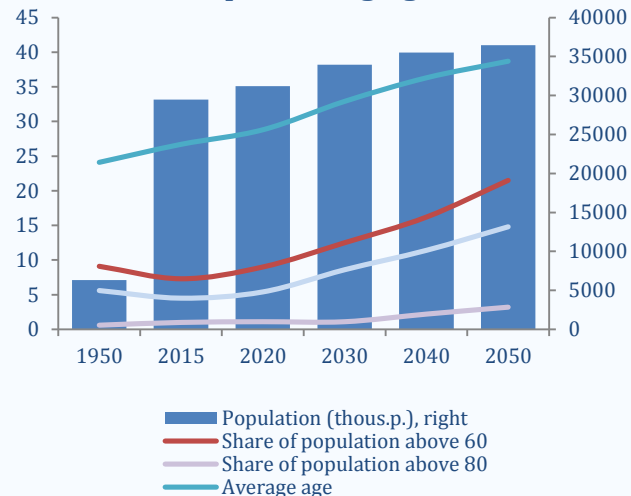
How to sustain the achieved results:

Main challenges

Demographic trends: population, natality, expected longevity



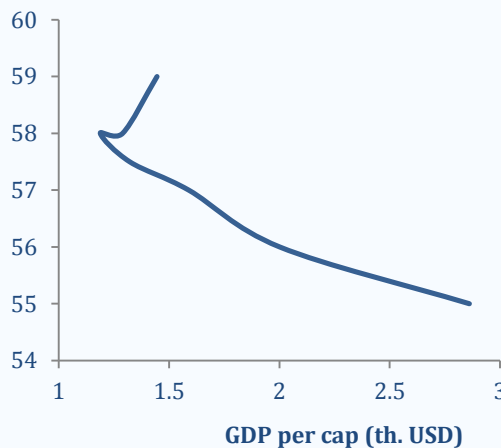
Transformation of the demographic pattern: Aging



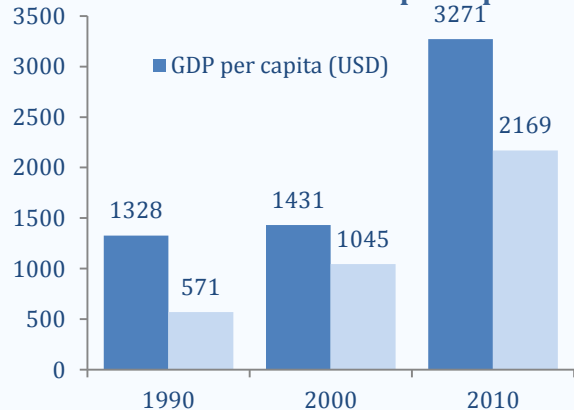
- Current and expected trends in the global and national economy are posing new challenges for sustaining nation's food security in the long term:
- Population growth and change in the demographic pattern + growth of personal income → transformations of the lifestyle and behavioral stereotypes → **increased demand for food and transformed food consumption pattern**

Index of land quality against GDP per capita (1993-2012)

Index of land quality

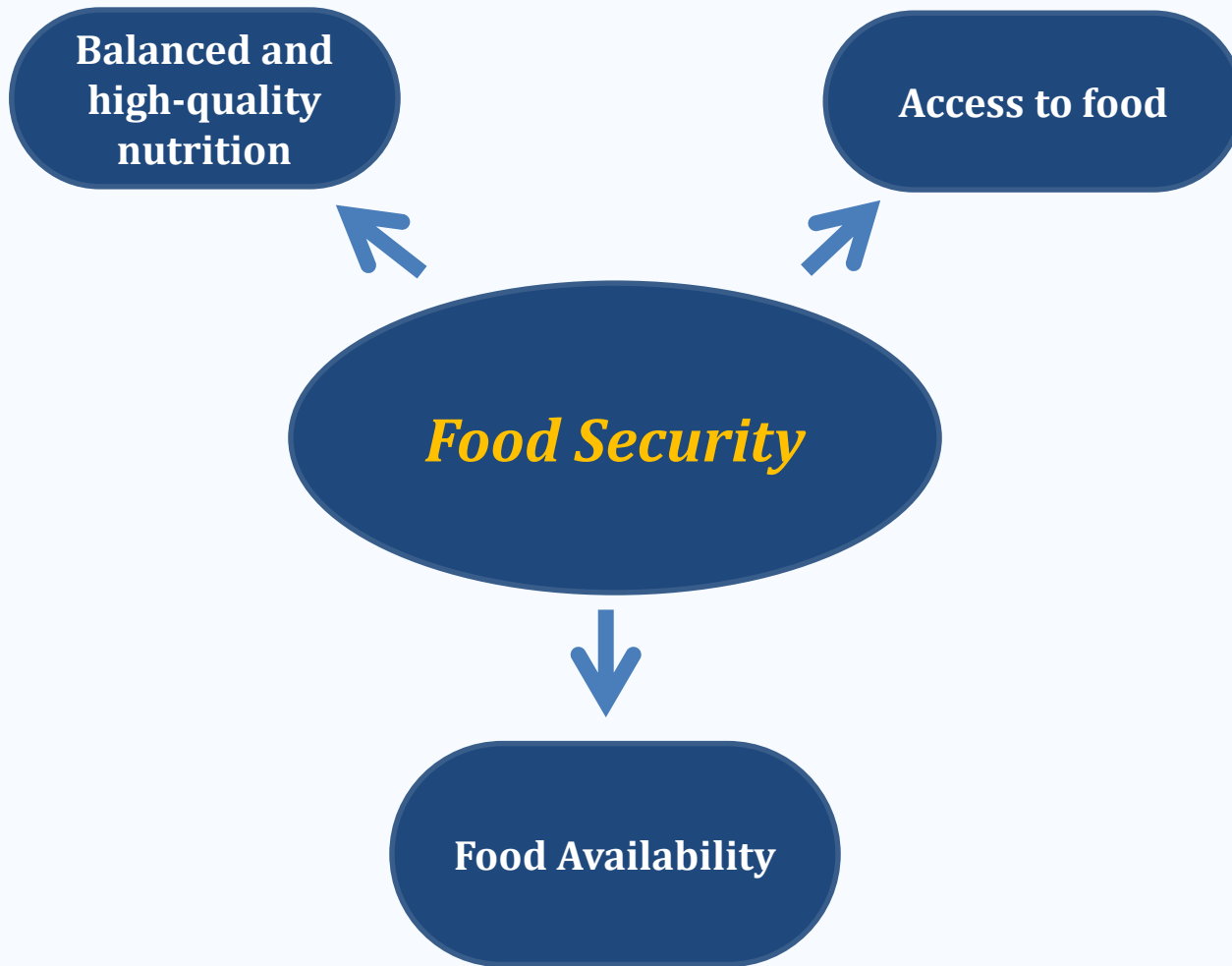


Growth of personal income: GDP and cash income per capita



- **Aggravating problems of deteriorating land quality and diminishing water supply** (due to the climatic and geopolitical factors)
- **To cope with the new challenges more comprehensive and complex approaches, methods and policy instruments need to be implemented**

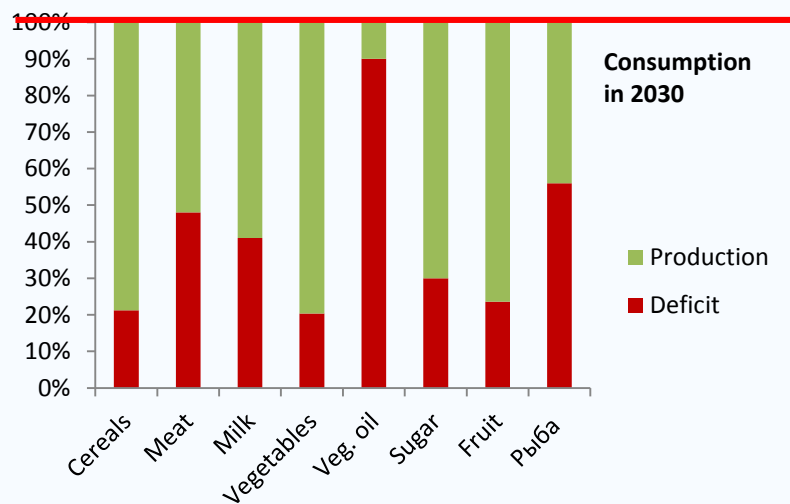
Complex approach to the Food Security: 3 key dimensions



- Food Security should be considered as an integrated concept incorporating 3 key dimensions
- The principal benchmarks of food policy should be determined in the three key areas:
 - ✓ **Goal 1** – to ensure the availability of the required amount of food;
 - ✓ **Goal 2** – to ensure the access to the essential foods for all the strata of the population;
 - ✓ **Goal 3** – to maintain a balanced and high-quality nutrition in order to improve the nation's gene pool.

Goal 1: Food Availability

Consumption, production and deficit of food in 2030
(consumption =100%)



Scenario 2. Focus on production of crops with the comparative advantage

	Vegetables VS Cotton		Fruit VS Wheat	
Change in the sown area, thous. ha	60	-60	42	-42
Change in yields, centners per hectare	180	1.2	100	2.4
Change in output, thous. tons	5810.4	-11.94	3283.0	164.19
Change in production costs, bln soums	1154.4	-59.8	149.1	-26.5
Change in export revenues (import costs), mln. USD	2232.2	-256.4	4866.8	-57.2
Additional investments, mln USD	728.36		1576.7	
Change in employment	125.8	-28.2	37.7	-1.68
Total benefit, mln USD	1384.2		3398.2	
New jobs, thous pers.	97.6		36	

- Projections of food production and consumption in 2030 → inertial development pattern will lead to the deficit of food and will not ensure the availability of the required amount of food.

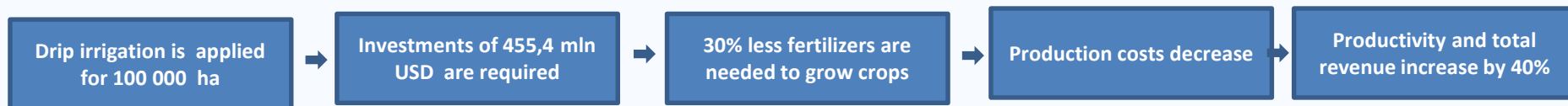
Scenarios to cover the deficit:

- Scenario 1 – sustaining a balance between the consumption and production of food by:
 - boosting productivity and crop yield;
 - expanding the sown area.
- Scenario 2 – focus on production of foods in which Uzbekistan has a comparative advantage
 - Reallocate 42 thous. ha from grain to fruit and 60 th. ha from cotton to vegetables;
 - Increase crop yield of fruit twice, of vegetables – by 1,6 times.

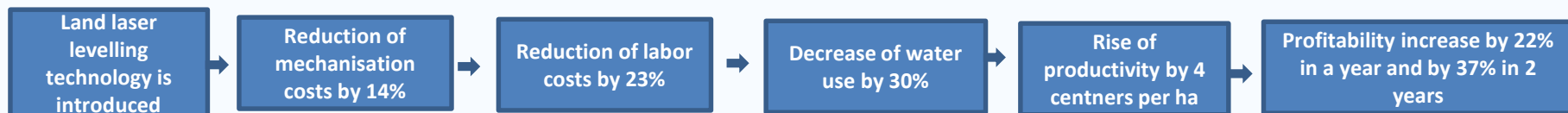
Goal 1: Food Availability: Recommendations to implement the scenarios

Effective implementation of either of the scenarios will require to:

1) Improve the water management and water use system to produce the required amounts of food:



2) Introduce advanced agro-technologies to raise the crop yield and livestock productivity



3) Step up research and development in agriculture to create more efficient local varieties of plants and breeds of animals and improve the quality of animal-husbandry technologies (90 mln. USD)

4) Expand and improve the quality of the veterinary services: in 2030 30,3 thousand veterinary personnel need to be present within the sector. (Now - 8,3 thousand specialists (27% of the required level))

Goal 2: Food Accessibility

- 1) Reformation of the agrarian institutions and optimization of the farm size by expanding the animal farms to 1000 heads of livestock, vegetable-growing farms - to 85 ha, fruit-growing farms - to 40 ha.

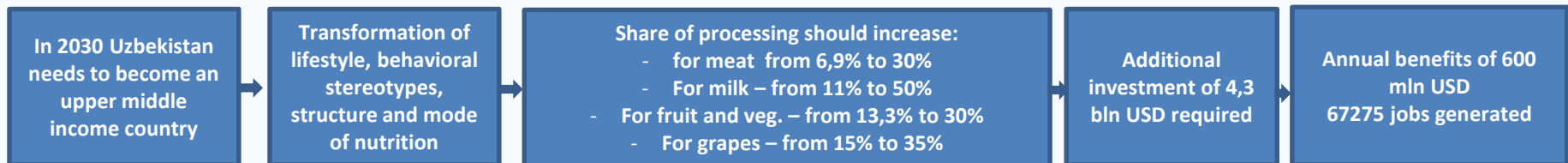


- 2) Create an efficient system of procurements, distribution, processing and sales of agricultural food products

- a) Establish an efficient cold storage system for fresh and processed foods



- b) Develop an efficient system of food processing

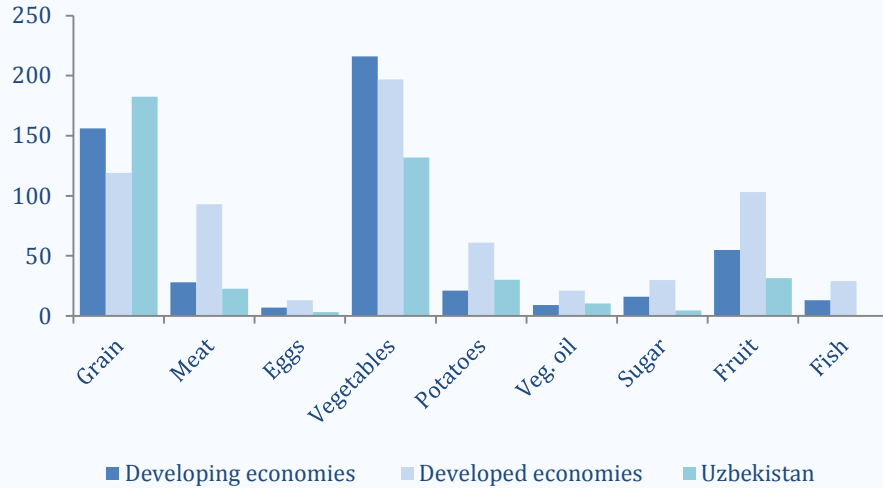


- c) Develop the efficient sales, marketing and distribution system

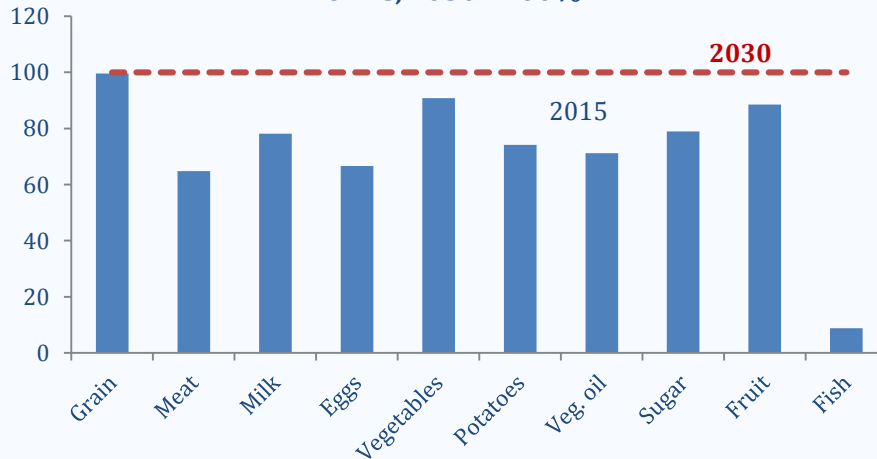
- Reformation of institutions in agriculture will require the shift from bazaar trade to the grocery store and supermarket trade to minimize transaction, transportation and administrative costs and ensure food safety
- By 2030, 70% of retail food sales should take place in stores and supermarkets (now – 37%)

Goal 3: Balanced nutrition and Quality of Food

Consumption levels of the various food groups:
Uzbekistan VS Other economies (kg per cap)



Consumption per capita: actual consumption against
norms, 2030 =100%



- 1) Balanced and high-quality nutrition is essential to improve the nation's gene pool
- 2) If the balanced and high-quality diet is provided benefits in the terms of people's health and human development will grow;
- 3) Instruments to achieve these results are:
 - Implementation of programs to improve the nutrition of pregnant women, breast-feeding mothers and children under 5 (1,14 bln USD);
 - Introduction of dietary standards and guidelines according to the ISO-2000 (257,8 mln USD);
 - Raising public awareness and dissemination of the information on healthy lifestyle and appropriate nutrition.

Findings

- The complex multidimensional approach to food security needs to be implemented;
- There is a need for multi-optional scenarios and estimations;
- Forecasting methods should go beyond the extrapolation, but rather take into account the transformative processes in all spheres;
- Food Security Strategy needs to be integrated into the broader framework of the country development strategy;
- The regional development context is important to develop the National Food Security Strategy.

Thank you!



Resources in English:

<http://www.cer.uz>

<http://transformation.cer.uz/>

<https://www.facebook.com/CER.Uzbekistan>

