

REGIONAL AGRICULTURE PROFILE (RAP) KAZAKHSTAN HUB





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AGRICULTURE INFRASTRUCTURE DIVISION

2020 ECONOMIC & SOCIAL INFRASTRUCTURE DEPARTMENT IN COLLABORATION WITH
ECONOMIC AND RESEARCH INSTITUTIONAL LEARNING DEPARTMENT

INTRODUCTION

The Islamic Development Bank (IsDB) Regional Hub in Kazakhstan (RH-KH), based in Almaty, Kazakhstan was established in 2018¹. The RH is responsible the Bank's operations in Kazakhstan, Kyrgyzstan, Tajikistan, Turkmenistan, and Uzbekistan.

THE PRESENT MEMBERSHIP OF THE IsDB CONSISTS OF

57 COUNTRIES

- ISDB MEMBER COUNTRIES
- REGIONAL AGRICULTURE PROFILE HUB



¹ The office was opened in 1997 as a regional office

KAZAKHSTAN

JOINING DATE **1996**
 SUBSCRIBED CAPITAL (SC) **US\$ 54 MILLION**
 % OF TOTAL IsDB SC **0.11**

KYRGYSTAN

JOINING DATE **1993**
 SUBSCRIBED CAPITAL (SC) **US\$ 25.84 MILLION**
 % OF TOTAL IsDB SC **0.05**

TAJIKISTAN

JOINING DATE **1997**
 SUBSCRIBED CAPITAL (SC) **US\$ 18.16 MILLION**
 % OF TOTAL IsDB SC **0.04**

TURKMENISTAN

JOINING DATE **1994**
 SUBSCRIBED CAPITAL (SC) **US\$ 4.96 MILLION**
 % OF TOTAL IsDB SC **0.01**

UZBEKISTAN

JOINING DATE **2003**
 SUBSCRIBED CAPITAL (SC) **13.44 MILLION US\$**
 % OF TOTAL IsDB SC **0.03**

ISDB GROUP TOTAL NET APPROVALS

1993-2019
 (MILLION US\$)

TOTAL
US\$ 5,693.0

OTHER FUNDS

67.6

1.2%



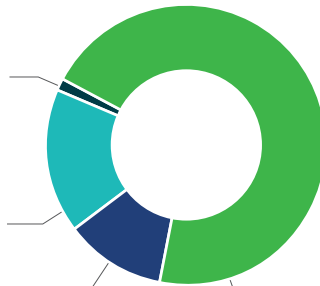
951.0

16.7%



662.1

11.6%



4,012.3

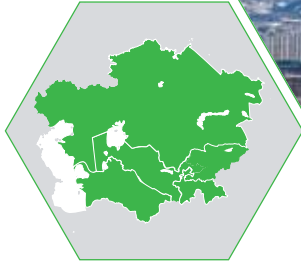
70.5%



KAZAKHSTAN HUB

TOTAL COUNTRIES AREA ('000 HA)

400,325



TOTAL POPULATION ('000)

72,499



2018

GDP PER CAPITA

(CURRENT PRICES, US\$)

4,084



2018

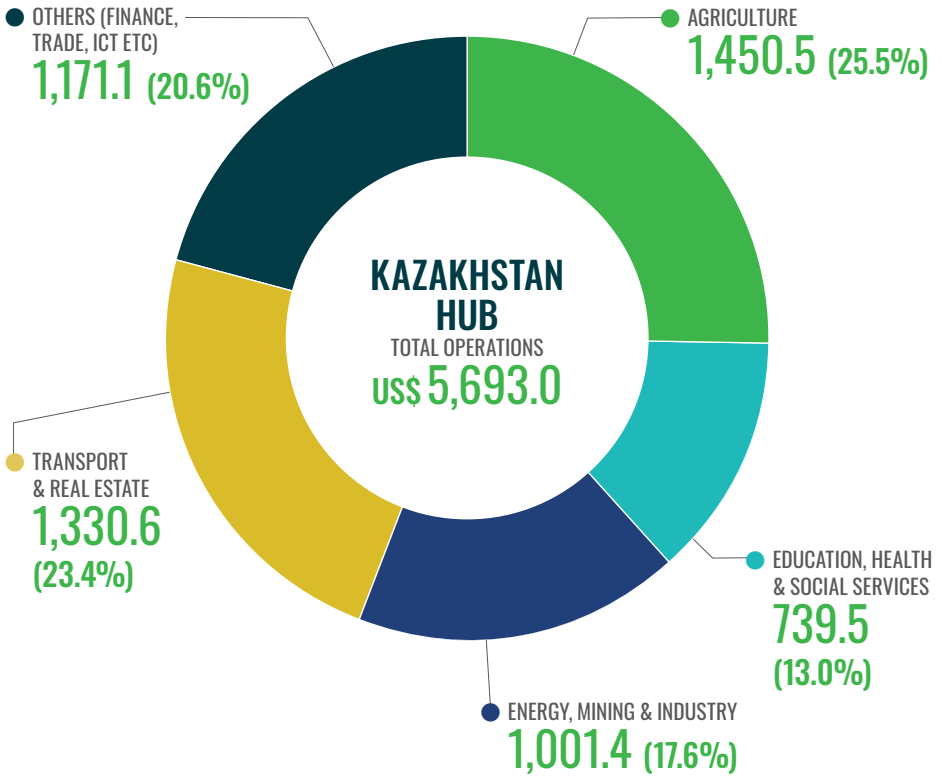




OVER
60%
OF THE TOTAL LAND AREA IS
AGRICULTURAL LAND, OF WHICH
50%
IS PERMANENT MEADOWS
AND PASTURES



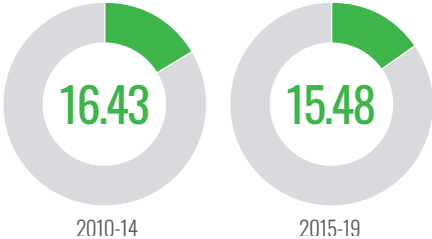
IsDB GROUP OPERATIONS BY SECTOR 1993-2019
(MILLION US\$)



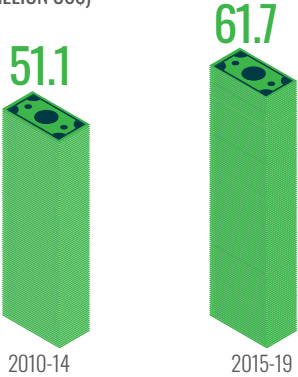
ECONOMIC RELEVANCE OF AGRICULTURE SECTOR

The economies of KH countries significantly expanded since 2000. However, the contribution of the sector to the economy has been declining over the past decade. Similarly, contribution of agriculture sector to total employment along with % female employment in the sector has declined.

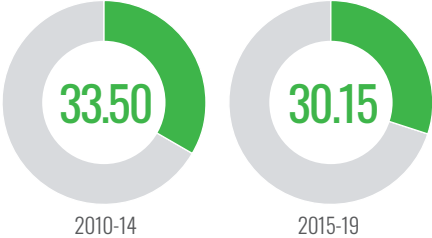
% AGRICULTURE TO GDP



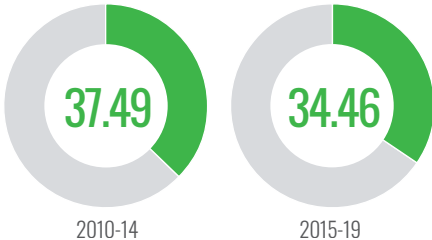
GDP (BILLION US\$)



% OF AGRIC. EMPLOYMENT TO TOTAL EMPLOYMENT

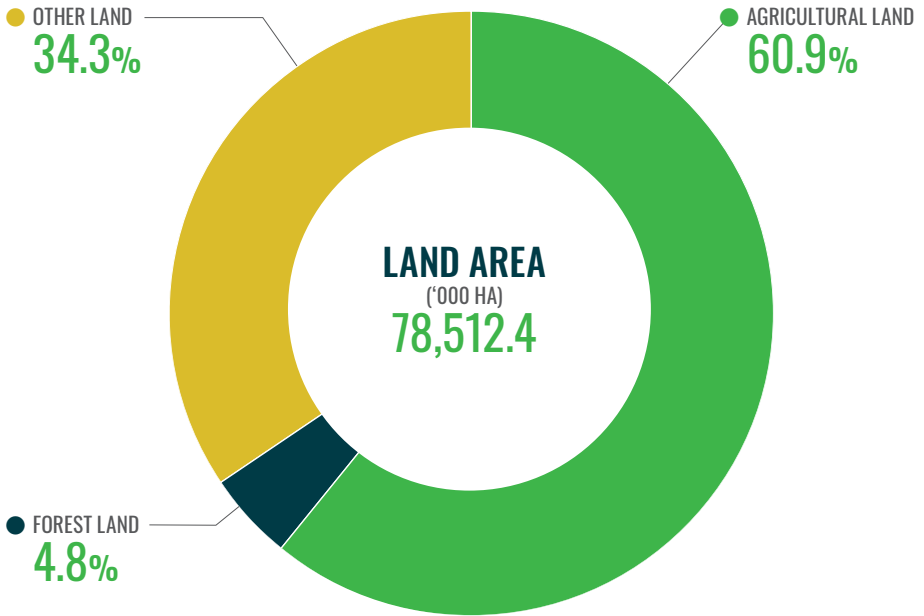


% OF FEMALE EMPLOYMENT IN AGRIC. TO FEMALE EMPLOYMENT

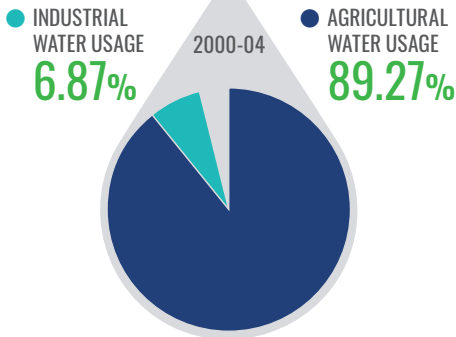


AGRICULTURE AND LAND USE

Land area consists of crop land comprising arable land and land under permanent crops including permanent meadows, forest area and other land. Over 60% of the total land area is agricultural land – of which more than 50% is permanent meadows and pastures. The land equipped for irrigation increased by 5% over the past two decades.



WATER USAGE (% OF TOTAL WATER USAGE)

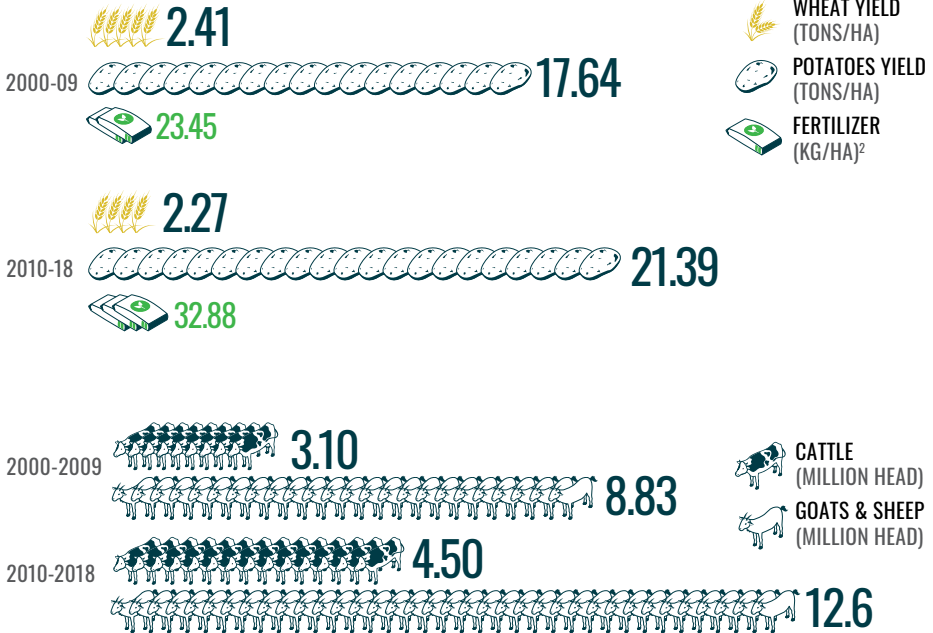


LAND AREA EQUIPPED FOR IRRIGATION (%)



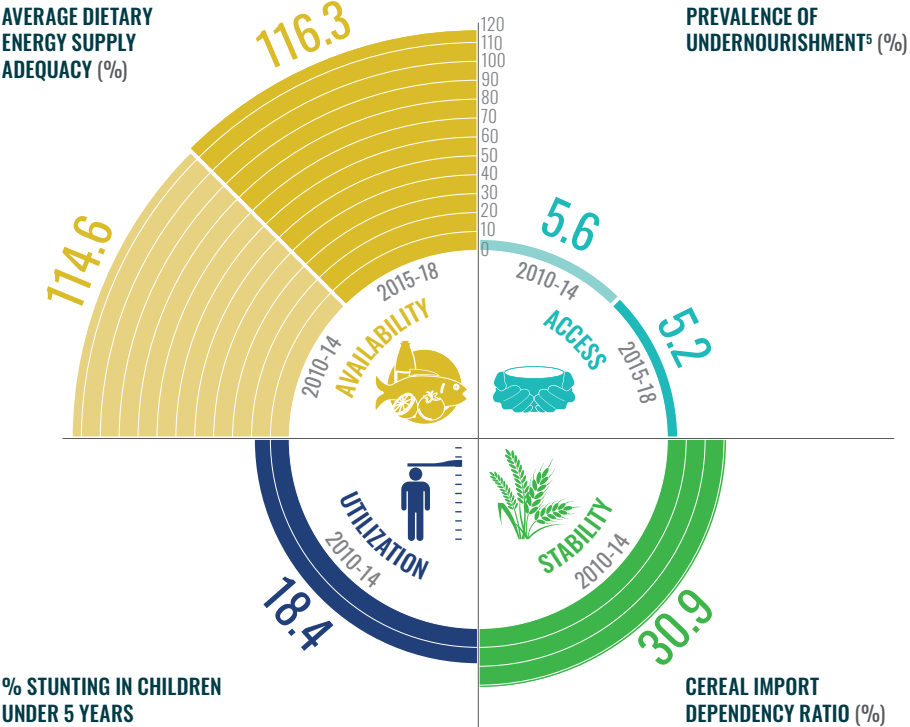
FOOD SECURITY AND NUTRITION

Wheat is a major staple crop in the region, followed by potato and livestock. Yield of wheat slightly declined while yield of potatoes increased over the past two decades. Livestock play a vital role in the socio-economic development of the region and important for the countries' food and nutrition security.



² Only for Kazakhstan, Kyrgyzstan and Tajikistan..

Overall food security in KH countries has significantly improved in recent years. Global Food Security Index increased from 47.2 in 2010-18 to 58.4 in 2019, while Global Hunger Index declined from 12.7 in 2010 to 9.2 in 2019.



³ Based on data for Kazakhstan, Tajikistan and Uzbekistan.
⁴ Excluding Tajikistan.
⁵ Only for Kazakhstan, Kyrgyzstan and Tajikistan.



IT IS PREDICTED
THAT IF NO MEASURES
ARE TAKEN, BY 2050
PRECIPITATION WILL RISE

18.7MM

LEADING TO INCREASED
FLOODING

CLIMATE CHANGE

The countries in KH 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 2.68°C by 2050 if no measures are taken. Likewise, precipitation will rise 18.7 mm by 2050.

CHANGES IN TEMPERATURE (DEGREES CELSIUS)



KAZAKHSTAN
HUB



1990-94



1995-99



2000-04



2005-09



2010-14



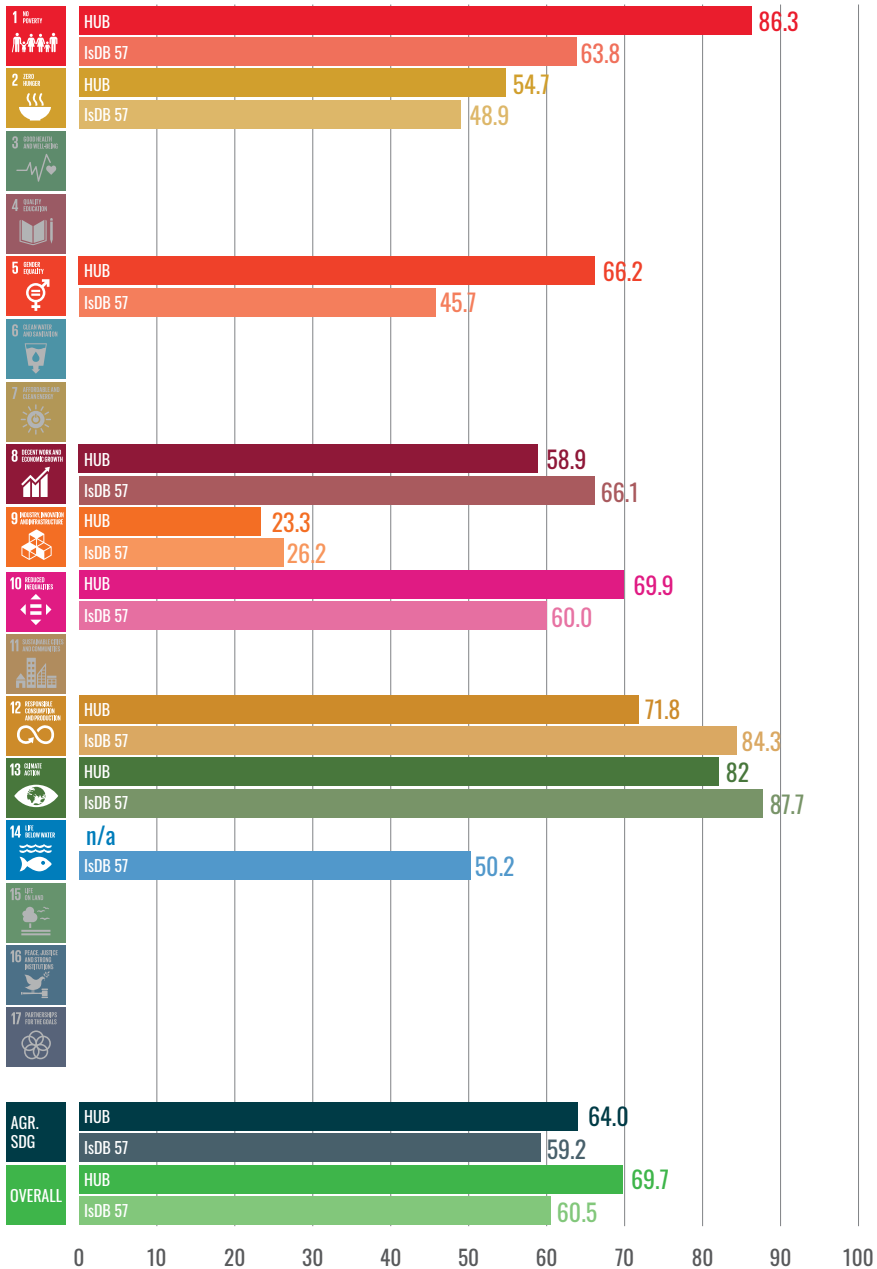
2015-18

2015-18
RECORDED A
1.75°
TEMPERATURE
RISE



PROGRESS TOWARDS THE SDGs

AGRICULTURE-RELATED SDG SCORES | KAZAKHSTAN HUB vs IsDB 57





KAZAKHSTAN
HUB HAS ACHIEVED THE
HIGHEST PROGRESS IN NO
POVERTY (SDG 1) WITH A
SCORE OF

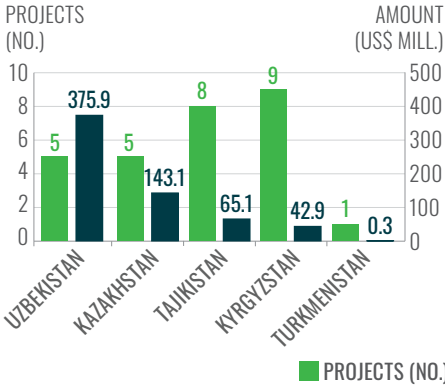
86.3%

IsDB FOOTPRINT IN THE REGION

IsDB AGRICULTURAL FINANCING | 1993-2019

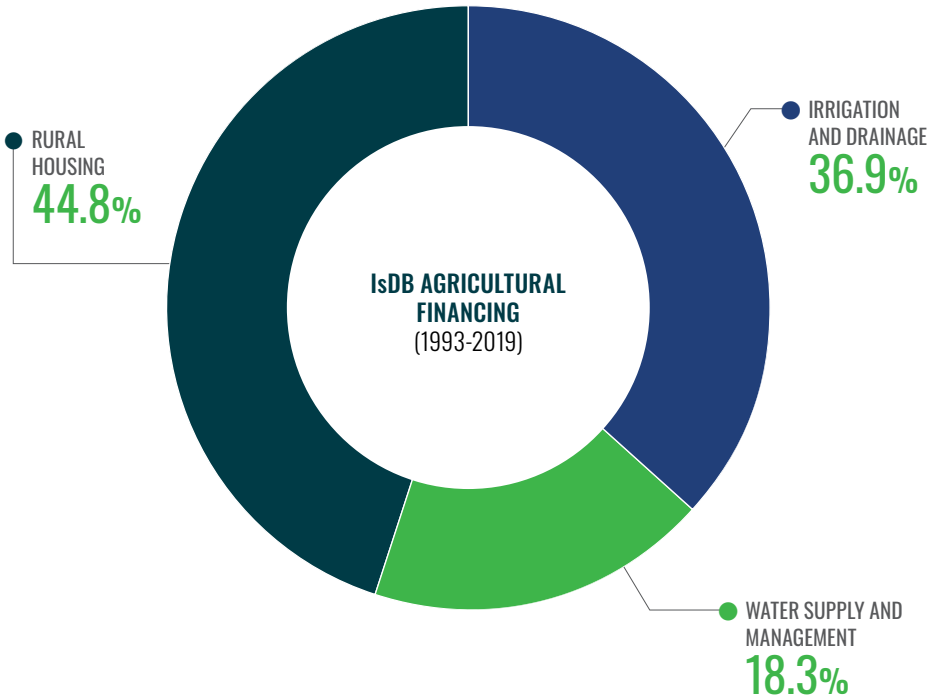
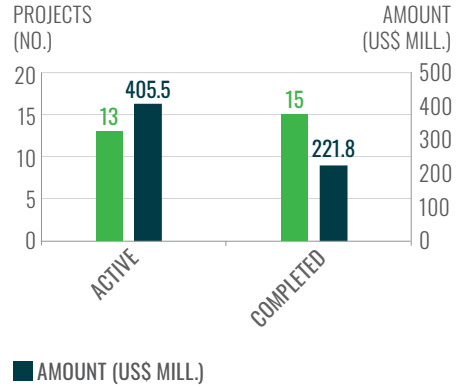
COUNTRY OPERATIONS

ACTIVE & COMPLETED (PROJECT NO AND US\$)



REGIONAL HUB OPERATIONS

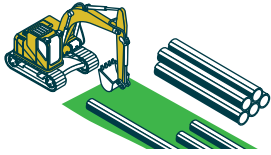
ACTIVE & COMPLETED (PROJECT NO AND US\$)



ISDB ONGOING INVESTMENT & KEY EXPECTED OUTPUT IN KAZAKHSTAN HUB

TOTAL PROJECT INVESTMENT:

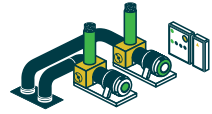
US\$ 899,77M



IRRIGATION/DRAINAGE CANALS (KM)
9,955



DEVELOPMENT OF IRRIGATED LAND (HA)
71,328



CONSTRUCTION OF WELLS-PUMP STATIONS (NO)
51



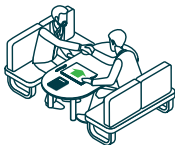
CONSTRUCTION OF WATER SUPPLY SYSTEMS (NO)
31



BENEFICIARIES (NO)
339,500



FARMERS TRAINED (NO)
35,724



JOBS CREATED (NO)
143,000



RURAL HOUSES BUILT (NO)
6,404



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 will launch the preparation of Kazakhstan, Tajikistan, Turkmenistan and Kyrgyzstan MCPS in 2022 and are expected to focus on the following thematic areas:



Irrigation, drainage and water resources



Institutional capacity development for agencies and farmers' organizations and cooperatives



Crop and livestock production/productivity



Support Islamic Financial Services Industry Development;



Inclusive value chain development along with market access

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)
- (ii) Global Food Security Index is taken from 2018 Global Food Security Index and 2019 Global Food Security Index (<https://foodsecurityindex.eiu.com/>).
- (iii) Global Food Hunger Index Scores from 2000 to 2019 from 2019 Global Hunger Index (<https://www.globalhungerindex.org/download/all.html>).
- (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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