



# ACKNOWLEDGEMENTS



MINISTRY OF AGRICULTURE  
OF THE REPUBLIC OF UZBEKISTAN

## STRATEGY FOR THE DEVELOPMENT OF AGRICULTURE OF THE REPUBLIC OF UZBEKISTAN FOR 2020-2030

The Strategy for the Development of Agriculture of the Republic of Uzbekistan for 2020-2030 was prepared by the Ministry of Agriculture of the Republic of Uzbekistan in collaboration with other relevant Government Ministries and Agencies. The main Strategy was formally adopted by Presidential Decree. Specific reform priorities for 2020 were formally adopted by Presidential Resolution. The official documents which form the legal basis for the strategy were as follows:

- (i) Decree of President of the Republic of Uzbekistan on the 'Approval of the Strategy for the Development of the Agriculture Sector of the Republic of Uzbekistan for 2020-2030 (Presidential Decree #5853 of 23rd October 2019).
- (ii) Resolution of the President of the Republic of Uzbekistan on the 'Measures for implementation in 2020 of the tasks identified in the Strategy for the Development of Agriculture of the Republic of Uzbekistan for 2020-2030' (Presidential Resolution #4575 of 28th January 2020).

This Publication has been compiled based upon the specific details defined in these two documents. Clustering of information has been undertaken for ease of reference only, using the nine strategic priority areas defined in the main Presidential Decree. Additional sections have been included to provide a summary of the vision in the sector in 2030, complemented by additional information on the situation in the agriculture sector of Uzbekistan today and relevant contact information.

The Government of Uzbekistan wishes to acknowledge the extensive technical support and guidance provided by the European Union, the World Bank & the UN Food and Agriculture Organization in the development of the Agriculture Strategy. The support and technical assistance provided by experts from these organizations throughout the design, preparation and consultation process was invaluable. Their support ensured both that the strategy was based upon relevant evidence-based analysis of the challenges in the agriculture sector and guided by relevant international best practices and experience.



European Union



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The Government of Uzbekistan would also like to recognize the active support and participation of various other international organizations, development partners and experts in support of strategic priority working groups throughout the strategy consultation process, whose support was also greatly appreciated including: GIZ, USAID, ADB, KOICA, UNDP, AFD and JICA.



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## PREFACE

**Agriculture lies at the heart of Uzbek society. It is the backbone of our economic and social infrastructure. Its importance extends far beyond providing us with the food we eat. It lies at the heart of our cultural heritage and rural traditions, reflected in each and every region of our beautiful country, through their own unique shades and rich diversity. Today in Uzbekistan, agriculture continues to provide significant employment opportunities and incomes for so many of us and remains a driving force of the growth of our economy.**



But as we gradually adapt and diversify our economy, we also recognize that the agriculture and food sector must also adapt and change, to allow us to effectively compete and thrive, both at home and abroad. This calls for new approaches to the development of the sector and policy making at all levels. This document provides an outline of this new approach and maps the steps to be taken to guide the transformation process.

The Agri-food Development Strategy 2020-2030, which was adopted by Decree on 23<sup>rd</sup> October 2019, responds to this need for change and aims to address, in a comprehensive manner, the need for key reforms that will be introduced over the next ten years to prepare the Uzbek Agri-food sector to effectively compete in global markets.

The Strategy provides a long-term vision for the development of Uzbek agriculture and rural areas, as well as offering the basis for a stable, predictable and transparent legal framework, aimed at improving the business climate and stimulating investment and innovation for the modernization of the sector. The Strategy also provides the basis for the institutional and budgetary reforms necessary for successful implementation.

Pursuing a balanced approach to development, the Strategy aims to boost competitiveness in the agriculture and food sector and to promote exports, while seeking an equitable distribution of its benefits, in particular by contributing to more direct engagement of small-scale farms and rural communities in the development of the sector and the improvement of the quality of life in rural areas, as well as preserving our precious natural resources and the environment.

The Strategy is the result of a collaborative process. The identification and prioritization of needs in Uzbekistan's agriculture sector and rural areas has been coordinated by the Ministry of Agriculture and has involved input from leading institutions within the government, representatives of major donors and international financial institutions, and consultation with other key stakeholders in the private sector and civil society. The efforts of all those who contributed to the process were very much appreciated and have brought considerable additional value and depth to the Strategy.

Comprehensive in its approach, the Strategy encompasses a wide range of issues that affect the agriculture and food sector as a whole, including agriculture land management, access to credit, agricultural research, education and advice, state budget funding and support mechanisms, international trade, food safety, animal and plant health, environmental protection and ensuring the sustainable management and use of the country's precious natural resources.

The successful implementation of the Strategy depends largely on effective public institutional and private sector cooperation and coordination. To this end, the Government will establish a number of new coordination mechanisms to ensure effective follow-up on the implementation of the Strategy and to oversee the delivery of the Roadmap. All interested parties, including leading private sector organizations, civil society and our international development partners will be invited to participate actively in the implementation process.

The government believes that the Strategy has the potential to have a major impact, not only on the development of the agri-food sector and rural areas of our country but also to serve as a locomotive for boosting the national economy of Uzbekistan and ultimately to improve the livelihoods of current and future generations.

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# AGRI-FOOD TRANSFORMATION VISION FOR 2030



**The Uzbekistan Strategy and Roadmap for the Agri-Food Sector provides an integrated, inclusive, equitable, realistic strategic vision and policy framework for reform in the agriculture, food and rural sector for the period 2020 to 2030.**

## OUR 2030 VISION:

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The Vision and long-term objective of the Strategy is to develop a competitive, market and export-oriented agri-food sector that will increase farm incomes, create new jobs, enhance food security and ensure the sustainable use of natural resources.

Implementation of the Strategy will help to accelerate the adoption of modern technologies, moving the country to the forefront of agri-food industry efficiency and innovation, establishing Uzbekistan as the leading exporter of high-value agri-food products in Central Asia.



## WHERE WILL WE BE IN 2030:

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Through the implementation of a long-term, ambitious reform process, Uzbekistan will develop a competitive, export-oriented agriculture sector; an agri-processing industry will produce competitive food products corresponding to international safety and quality standards. Investment and modernization in the processing industry will allow for the production of more processed and high value-added products that diversify the country's export portfolio. Consequently, Uzbekistan's position in traditional export markets will be strengthened and trade in new export products to new partner countries will reinforce the positive agri-food trade balance of the country.

In the farm sector, healthy and diversified production structures will evolve with the help of a reformed, more flexible framework for land use rights and protections. Farms of different sizes and orientations will contribute to efficient agricultural production; specialization and diversification of production will make it possible for different types of farms to be viable. These developments will be possible in the context of a stable and predictable, simple and targeted modern agricultural policy and support system in which market distorting forms of support, such as price support and coupled payments, are kept to a minimum.

Rural policies will be developed that take into account local needs and encourage local initiatives. These will result in new employment opportunities by both developing rural non-farming businesses and by diversifying farm production and developing more high value-added product options - and improved infrastructure, leading to a better quality of life in rural areas throughout the country.

The environmental sustainability of agricultural and food production activities will be taken into account in all policy interventions. Regulatory norms for water, soil and pesticides will be established based on international standards. Wider application of good farming practices, as well as modern and efficient policies will contribute to protecting natural resources.

To realize these ambitious but realistic aspirations, Uzbekistan will capitalize on the positive longterm outlook for global growth in demand for agri-food products, especially in Asia and the Middle East, by playing to its strengths and successfully addressing weaknesses and challenges. There will be a strong focus on the development of targeted horticulture products, through the creation of robust, integrated value-chains.

Farmers and the private sector in general will be put in the driving seat of sectoral change, to enable the sector to generate growth and create new employment opportunities.

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# AGRI-FOOD SECTOR TRENDS AND REFORM PROGRESS



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FAO, UZBEKISTAN

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## AGRI-FOOD SECTOR TRENDS:

The Uzbek Agri-food sector has experienced a number of significant changes since the liberalization of the Uzbek exchange rate in 2017. Unfortunately, the sector has experienced a significant slowdown in growth since 2016. In 2017, following currency liberalization, growth of the sector dropped to 2% and in 2018, fell again to levels below 1%. This was caused by a number of factors, including the declining volumes and value of cotton and wheat production, lower farm crop outputs, poor and unpredictable weather conditions and a gradual shift of some farmers to introduce livestock production.

Trade patterns have also been gradually changing during the last two to three years, as the share of horticulture in agri-food exports has increased rapidly. In 2017 horticulture exports rose to 43% and in 2018, to over 60% of total agri-food exports, with much of this export growth coming from non-traditional markets in East and South Asia. This emerging trend signals the beginnings of a very significant opportunity for the agri-food sector which will be further accelerated through targeted policy reforms and attraction of new investment (See Annex for more detailed statistics on the current trends in the Uzbek Agri-food sector).



Underpinning many of the changes in the sector, a number of important reforms have already been introduced over the last three years. This has included, in 2017, the abolition of the export monopoly of UzAgroExport which previously controlled all agri-food exports from Uzbekistan; the abolition of the system for the mandatory sale of 25% of hard currency earnings. Today exporters are allowed to keep 100% of the value of their earned hard currency on their own business accounts; and there has been a significant reduction in the time required to receive certificates and register contracts with the Uzbek customs authorities for horticulture exporters from 10 days to 3 days. All of these changes have significantly improved the efficiency of agri-food trade flows both from and to Uzbekistan.

These reforms were followed, in 2018, by various reforms to improve the enabling environment for trade. This included the liberalization of transport services, providing agri-food exporters with the freedom to use any form of transportation to move their products for export which was previously restricted to using only the national railroad system. This reform was complemented by: the establishment of a number of “green corridors” at various Uzbek border crossings, to ensure the smooth passage of agri-food products both into and out of the country; the elimination of minimum export prices; the removal of full prepayment requirements for export contracts which were not managed by UzAgroexport; and a significant improvement in access to credit for horticulture agribusinesses to invest and modernize all of which are aimed at improving productivity, quality and diversity of products grown and traded.

Importantly, in the cotton sector, which has dominated Uzbek government policy in the sector over the last two decades, there has been: a significant reduction in cotton growing in low-yielding areas; a gradual increase in state procurement prices for cotton; a reduction in the gap with export parity prices; and a gradual shift in cotton exports from low-value fiber to high-value textile products. The government has also introduced a commercialization programme which promotes the establishment of integrated private sector cotton clusters, and in 2019, these new cotton clusters were responsible for managing over 50% of the cotton growing areas in Uzbekistan.

In the wheat sector, significant reform progress has also been made in recent years, including the removal of the state price subsidy for 'social' bread. This inevitably led to an increase in average household expenditures by 4% which was compensated for by the introduction of social measures to support targeted vulnerable households. To stabilize the market, wholesale market prices for flour were fixed in 2018. Subsequently, in 2019, the state wheat procurement price was increased, as part of a gradual policy of closing the gap between state and world market prices to be introduced over the next two years, thereby allowing for full liberalization of the wheat sector by 2022.

Most significantly, the government launched a process for the design of a new agri-food development strategy, following the appointment of the new Minister of Agriculture, Mr. Jamshid Khodaev, in February 2019.

The new Agri-Food Development Strategy was developed following an extensive consultation process. The Strategy was formally adopted in October 2019 by Presidential Decree. The approved strategy and the Roadmap are presented in the following sections and provide a clear pathway for the reform and development of the sector over the next ten years.

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# STRATEGY FOR THE DEVELOPMENT OF THE AGRI-FOOD SECTOR OF THE REPUBLIC OF UZBEKISTAN 2020-2030



PHOTO CREDITS:  
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Future sustainable development of the agriculture and food industry of the Republic of Uzbekistan requires the gradual adjustment of state policy, on the basis of new market-based approaches. The Strategy for the Development of the Agri-food Sector of the Republic of Uzbekistan for 2020–2030 (hereinafter referred to as the Strategy) is designed to achieve this transition.

## THE MAIN OBJECTIVE OF THE STRATEGY IS TO IMPROVE THE COMPETITIVENESS OF THE AGRI-FOOD SECTOR, ARTICULATED THROUGH NINE STRATEGIC PRIORITIES:



1  
Ensuring food security of the population



2  
Creating a favorable agri-business environment and added value chains



3  
Reducing the role of the state and attracting private investment



4  
Ensuring rational use of natural resources and environmental protection



5  
Development of modern public administration systems



6  
Gradual diversification of state expenditures on sector support



7  
Development of research, education, information and advisory services



8  
Development of rural areas



9  
Development of transparent agri-food statistics services



## PRIORITY 1

# ENSURING FOOD SECURITY OF THE POPULATION

### STRATEGIC CHALLENGES:

Major factors affecting food security include population growth, low incomes, increased demand for land, water and energy resources, and increased risk of climate-change related threats from droughts, flooding, hail etc. In recent years, as a result of a series of measures to bolster food security in the country, Uzbekistan has strengthened its position in the world, gradually improving its position in the Global Hunger Index for 2018, where Uzbekistan is now ranked 52nd out of 119 countries. However, there remain significant on-going challenges to ensure the stable supply of food for vulnerable segments of the population, increasing the purchasing power of low-income households, and preventing sharp fluctuations in prices and outputs.

### STRATEGIC OBJECTIVES:

The main goal is the development and effective implementation of state policy aimed at ensuring food security for the entire population. The priority focuses on ensuring that all households have access to safe and nutritious food, at affordable and stable prices.

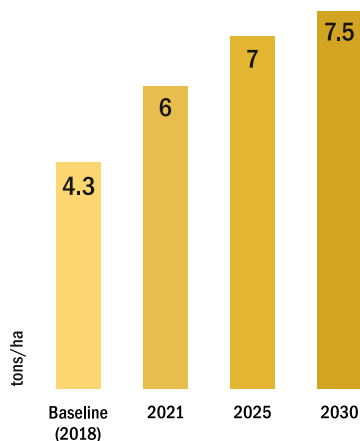
### KEY STRATEGIC

**ACTIONS:** that are planned to contribute to the achievement of these goals include:

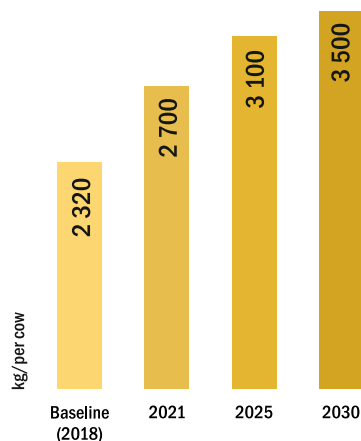
- Improving the mechanisms for providing food to socially vulnerable segments of the population, as well as encouraging more direct linkages between agricultural producers and schools, hospitals and other public service providers.
- Introduction of a system of state procurement of cereals and other products based on quotas at market prices and the phased abolition of state regulation of prices for agri-food products;
- Development of long-term programs to promote healthy food eating habits and culture;
- Implementation of a food security assessment system and continuous monitoring, based on internationally recognized methods and best practices;
- Development of sectoral programs for the intensification of production of socially significant types of products;
- Conducting targeted research and development aimed at increasing livestock productivity, sustainable intensification of production of milk, fish and poultry meat.

# KEY PERFORMANCE INDICATORS AND TARGETS

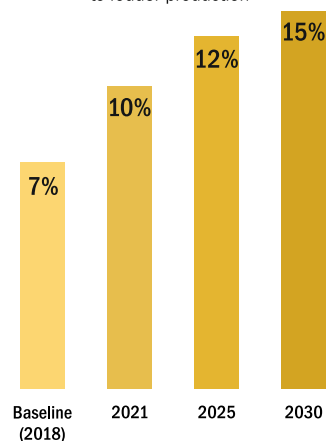
An increase in the average yield of cereal crops



Increase in average milk yield of cow's milk



Percentage of farmland allocated to fodder production



## ROADMAP FOR IMPLEMENTATION

### SHORT TERM ACTIONS

1



May 30, 2020



The Ministry of Agriculture, Ministry of Health, Ministry of Economy and Industry, State Committee for Veterinary and Developing of Livestock Farming

In order to bring the system of food and consumption security in compliance with the international standards to charge the Ministry of Agriculture with the task of coordination of the activities of ministries and agencies, to institutional assessment of the state governance system in the area of food security, development of mechanisms for securing fulfilling the powers of ministries and agencies pertaining to the area is envisaged.

2



October 1, 2020



The Ministry of Agriculture, Ministry of Health, Ministry of Economy and Industry, stake holder ministries and agencies

Introduction of the intervention purchase system for cereal grains in the domestic market envisaging stage by stage decrease of the amount of government order for grains.

2



August 1, 2020



The Ministry of Agriculture, stakeholder ministries and agencies

Developing of efficient mechanisms for providing food to the groups of population needing social protection, including integration of agricultural producers with social facilities.

4



December 30, 2020, and then permanently



The Ministry of Agriculture, stakeholder ministries and agencies

To establish the system of assessing food security on the basis of internationally recognized methodology and best practices, as well as permanently monitor it.

### MEDIUM AND LONG TERM ACTIONS



Regularly



The Ministry of Agriculture, stakeholder ministries and agencies

5

Continuous monitoring of the implementation results of the food safety assessment system based on internationally recognized methodologies and best practices.



Q2 2021



Ministry of Agriculture, Ministry of Health, Ministry of Economy and Industry, State Committee for Veterinary and Livestock Development

6

Conducting a social survey to study the consumption and incomes of the population in order to develop state programs and measures to assess the food security of the population as well as rural development.



Q1 2021



Ministry of Health, Ministry of Agriculture

7

Development of long-term programs to promote a healthy eating culture



Q2 2022



Ministry of Agriculture

8

Development of sectoral programs to improve agricultural efficiency and intensify the production of socially significant types of products.



Q4 2022



State Committee for Veterinary and Livestock Development, Ministry of Agriculture

9

Conducting research aimed at increasing livestock productivity and sustainable production intensification of poultry and fish meat.



## PRIORITY 2

# CREATING A FAVORABLE AGRI-BUSINESS ENVIRONMENT AND ADDED VALUE CHAINS

### STRATEGIC CHALLENGES:

An important factor in ensuring agricultural competitiveness is the development of more integrated and efficient value chains. The current high costs for collection, transportation, storing, processing, packaging and certification of products from the field to final consumers significantly reduces the competitiveness and profitability of Uzbek agri-food producers and processes.

The low level of development of the food industry limits the capabilities for increasing the volume of production of high value-added products. In order to attract investment in agri-food market infrastructure there is a need to develop new financial instruments, improve the business climate and design targeted measures aimed at expanding the agri-food processing sector and promoting the development of more integrated and accessible value chains.

In recent years, some small-scale producers have actively invested in modern storage facilities and processing equipment, supported by various sources of financing, including subsidized credit lines from international financial institutions. Despite such investments, most small-scale producers remain largely isolated from processing enterprises and exporting organizations. This is in part due to the lack of effective mechanisms available to encourage small-scale producers to form farmer groups, thereby limiting economies of scale and inhibiting opportunities for their integration into value chains.

There is also a shortage of laboratories, wholesale markets and logistics centers that meet the requirements of international standards and quality requirements, as well as equipment at customs and border points for phytosanitary control of horticulture products. This, in turn, prevents the increase in the volume of manufactured and sold products, the growth of value added and diversification of product types and export geography.

It is also necessary to ensure the safety and quality of agricultural and food products by bringing the national legal framework for sanitary and phytosanitary controls in line with the requirements of the World Trade Organization and the standards of target international markets. In addition, partnerships between traders, processors and exporters with dekhkan farms and owners of household plots, which account for more than 70% of gross agricultural output, need to be further developed.

### STRATEGIC OBJECTIVES:

The main objective of this strategic priority is to increase the export potential of the agri-food sector, increase the volume of value-added products, expand the introduction of certification systems, based on international standards, and the development of cooperation mechanisms to promote farmer groups.

## KEY STRATEGIC

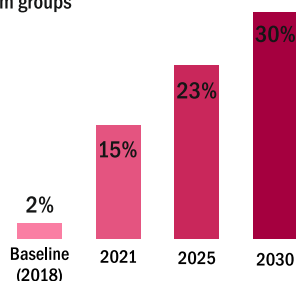
**ACTIONS:** that are planned to contribute to the achievement of these goals include:

- Harmonization of the national plant quarantine and protection system with the requirements of the WTO Agreement on the application of Sanitary and Phytosanitary (SPS) measures;
- Bringing the national system for protecting animal health and controlling livestock production in line with the standards of the World Organization for Animal Health (OIE);
- Establishment of an Innovation Education Center to support the development of value chains in agriculture, based on international best practices;
- Development of mechanisms to facilitate the implementation of internationally recognized quality standards (Global G.A.P, Organic, HACCP, etc.);
- Development and implementation of feedback mechanisms with leading agricultural enterprises;
- Prioritization of negotiations & implementation of trade agreements in new target export markets;
- Reduction of costs for transportation and marketing of agri-food products in local and target international markets;
- Assessment of opportunities for expanding the use of the «Made in Uzbekistan» brand to promote domestic food products in target export markets;
- Development of a plan to improve the national quality system;
- Development of advisory services aimed at providing information on export markets, export readiness, trade regime and trade finance;
- Increasing the role of diplomatic missions of the Republic of Uzbekistan in the process of collecting information about target markets and in promoting trade of agri-food products;
- Improving the system for protecting the rights of authors of plant varieties (including patent tests);
- Introduction of a unified trading system based on agro-logistics centers (based on auction and exchange trading);
- Improvement of services provided by the Crop Variety Testing Center
- Creation of the National Gene Bank for the storage of new plant species;
- Improving the types of services provided by the center for agricultural standardization;
- Widespread introduction of market mechanisms in the production of raw cotton and the cotton and textile sector;
- Adherence to the International Plant Protection Convention (IPPC);
- Development of a mechanism for allocating land on preferential terms to dekhkan farms in order to stimulate the expansion of activities;
- Creation of a special laboratory for testing genetically modified plant varieties with the attraction of funds from international financial institutions;
- Further stimulation of attracting investments in trade infrastructure and agri-logistics centers, food safety laboratories and sanitary and phytosanitary systems, necessary equipment and inventory;
- Improving the registration system of pesticides and the maximum permissible levels of pesticides (MRL) in accordance with the International Plant Protection Convention and other relevant international standards, providing information to exporters and manufacturers;

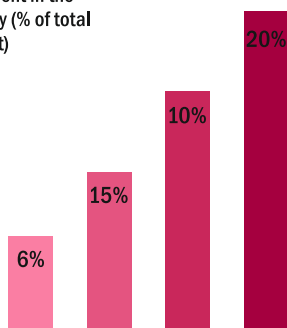
- Attraction of grants and technical assistance funds from international financial institutions for the modernization of the material and technical base of research institutes in the field of seed production and horticulture;
- Stimulation of cooperation between agricultural producers and development of measures for their integration into modern value chains in the domestic and international markets
- Formation of associations (cooperatives and others) coordinating the manufacture of agricultural products and services provided in this area, making operational decisions and participating in a dialogue on the formation of industry policy
- Ensuring cooperation between agricultural associations, farms and dehqan farms with industrial processing enterprises (including clusters);
- Implementation of pilot investment programs to support the development and diversification of small business in the agricultural sector;
- Development of an export growth strategy based on the results of assessments of the horticulture and livestock sectors (initially for the main 10-15 types of exported products based on an analysis of long-term data and market trends);
- Modernization of the food safety and quality control system.

## KEY PERFORMANCE INDICATORS AND TARGETS

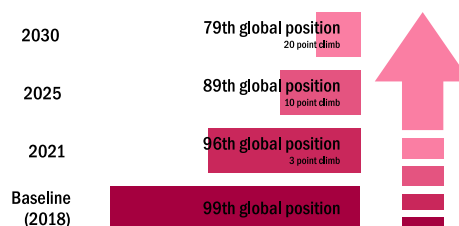
Share of exports under productive partnerships between agribusinesses & farm groups



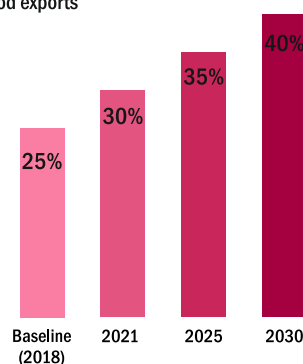
The share of employment in the food and light industry (% of total agri-food employment)



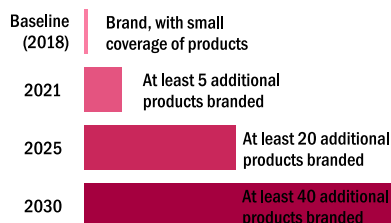
Improving the position of Uzbekistan in the World Bank ranking on the Global Logistics Performance Index



Increase in share of processed products in total agri-food exports



Introduction and promotion of the brand of agricultural products of Uzbekistan



# ROADMAP FOR IMPLEMENTATION

## SHORT TERM ACTIONS

**1**  March 1, 2020  The Ministry of Agriculture, Ministry of Economy and Industry, Uzbektekstilprom Association, Uzpekhtasanoat JSC

Evaluation of the performance of cotton and textile clusters in order to identify measures for securing efficient use of agriculture lands, sophistication of the relations between clusters and farmers on the basis of introduction of transparent market mechanisms aimed at increasing incomes of farmer's entities.

**2**  March 1, 2020 and then permanently  The Ministry of Agriculture, Ministry of Investments and Foreign Trade, O'zstandart Agency

To develop clear mechanisms for helping introduction of quality standards recognized in the international markets (Global G.A.P, Organic, HACCP etc.).

**3**  March 1, 2020 and then permanently  The Ministry of Investments and Foreign Trade, Ministry of Agriculture

Development of consultation services aimed at providing information on export markets, preparation to export, trade regulations and financing of trade.

**4**  May 30, 2020  The State Committee for Veterinary and Developing of Lifestock Farming, Ministry of Agriculture, Ministry of Health, O'zstandart Agency

To bring the National System for Animal Health Protection and Surveillance of Life Stock Products into compliance with the Standards of the International Epizootic Bureau (IEB).

**5**  July 1, 2020 and then permanently  Ministry of Investments and Foreign Trade, Ministry of Agriculture, «Uzbekoziqovqat» Holding

Development and introduction of efficient mechanisms of interaction with leading agriculture enterprises.

Thereat, the following is envisaged:

- identification of priorities for holding negotiations and implementation of trade agreements at the new target export markets;
- reduction of the transportation and marketing cost of agriculture industrial goods at the domestic and target international markets;
- evaluation of opportunities for extensive use of "Made in Uzbekistan" brand for export of the local food products to the target export markets;
- developing of detailed plan for sophistication of the national system of quality.

 July 1, 2020  The Ministry of Agriculture

**6** Sophistication of the services provided by the Centre for standardization of agriculture

 July 1, 2020  The Cabinet of Minister, State Inspection of Plants Quarantine, Ministry of Agriculture, Ministry of Investments and Foreign Trade

**7** Taking measures of harmonization of the national system for plant quarantine and protection with the requirements of the WTO Agreement on the Application of Sanitary and Phytosanitary Measures

 March 1, 2020  The Ministry of Agriculture

**8** To sophisticate the services provided by the Centre for testing agricultural crops, to establish the National Bank of Genes for storing new species of crops.

 September 1, 2020  The Ministry of Agriculture, Ministry of Innovative Development, stakeholder ministries and agencies

**9** Establishment of Innovative Educational Centre for support of the value added chain development in the agriculture on the basis of international best practices.

 November 1, 2020  The Ministry of Agriculture, Ministry of Health, Ministry of Economy and Industry, O'zstandart Agency, State Committee for Veterinary and Developing of Lifestock Farming, State Inspection for Plants Quarantine

**10** Upgrading of the system of food safety and quality control.

 November 1, 2020  The Ministry of Agriculture, Ministry of Justice

**11** Sophistication the system of protection the copy rights of authors of new crops species (including patent testing).

## MEDIUM AND LONG TERM ACTIONS

12



Permanently



Ministry of Agriculture, Uzstandard Agency

Evaluation of the performance of cotton and textile clusters in order to identify measures for securing efficient use of agriculture lands, sophistication of the relations between clusters and farmers on the basis of introduction of transparent market mechanisms aimed at increasing incomes of farmer's entities.

13



Permanently



Ministry of Agriculture, Interested ministries and departments

Organization of short-term trainings, including remote ones, for gardening and greenhouse specialists, development and delivery of training materials to places.

14



Permanently



Ministry of Investment and Foreign Trade, Ministry of Agriculture, "Uzbekozikovkatholding" holding company

Development and implementation of effective mechanisms for interaction with leading agricultural enterprises. Herewith:

- Identify priority areas for negotiation and implementation of trade agreements in new target export markets;
- Reduce costs for transportation and marketing of agri-food products in international markets;
- Assess the potentials of widespread use of the "Made in Uzbekistan" brand to promote domestic food products to target export markets;
- Development of a detailed plan to improve the national quality assurance system.

15



Permanently



Ministry of Agriculture, Ministry of Health, Ministry of Economy & Industry, Uzstandard Agency, State Committee for Veterinary & Livestock, State Inspection for Plant Quarantine

Development of advisory services on providing information on export markets, export readiness, trade regimes and trade financing.

16



Q4 2021



Ministry of Agriculture, Ministry of Investment and Foreign Trade, State Committee for Veterinary and Livestock Development

Development of a strategy to increase export of agricultural products based on the assessment of the main sectors of fruit and vegetable and livestock products (based on long-term data and analysis of market trends for 10-15 main exported products), including organic products with high export potential.

17



Q1 2021



Ministry of Agriculture, Ministry of Health, Ministry of Economy & Industry, Uzstandard Agency, State Committee for Veterinary & Livestock, State Inspection for Plant Quarantine

Restructuring and modernization of the quality control and food safety system based on the analysis of existing infrastructure.

18



Q3 2021



Ministry of Economy & Industry, Ministry of Agriculture, Ministry of Finance, Ministry of Health, State Committee for Veterinary & Livestock Development

Development of targeted support measures for the development of business entities involved in the storage and processing of agricultural products in rural areas, modernization of local markets.



Q2 2021



Ministry of Economy and Industry, Ministry of Agriculture, Ministry of Transport

19

Development of value chains based on a detailed assessment of factors constraining the development, taking into account the characteristics of regions and places of direct concentration of trade.



Q4 2021



Ministry of Agriculture, Ministry of Economy and Industry, Uzteksilprpom association, JSC Uzpakhtasanoat

20

Conducting a detailed assessment of cotton-textile clusters activity in order to identify measures for the development and promotion of clusters in all sectors.



Q2 2021



Ministry of Agriculture, Ministry of Development of Information Technologies & Communications, Ministry of Investment & Foreign Trade, Ministry of Economy & Industry

21

Implementation of modern information technologies for monitoring the agri-food market, focused on key export markets and priority products. At the same time, regularly publish information on prices for goods in order to help manufacturers and processors in decision-making.



Q1 2021



Ministry of Agriculture, Ministry of Economy and Industry, Council of farmers, dekhkan farms and homeowners

22

Implementation of pilot investment programs to support the development and diversification of small businesses, providing grants and subsidized loans to support start-up initiatives and cooperation of producers in rural areas and aimed at creating value chains.



Q1 2021



Goskomzemgeodezkadastr, Ministry of Agriculture

23

Introducing amendments to the Land Code of the Republic of Uzbekistan providing lease and sublease possibilities.



Q4 2021



Ministry of Agriculture, Ministry of Investment and Foreign Trade

24

Creation of a special laboratory for testing genetically modified crops and plant varieties with the involvement of international financial institutions' funds.



Q1 2021



Ministry of Agriculture, Ministry of Investment and Foreign Trade

25

Promotion of a unified trading system (based on auction and exchange trade) on the basis of agri-logistics centers' network.



Q4 2021



The Ministry of Agriculture

26

Modernization of the material and technical base, improvement of the activities of research institutes in the field of seed production and horticulture.



July 1, 2020



Ministry of Economy and Industry, Ministry of Agriculture, Ministry of Investment & Foreign Trade, Ministry of Health, State Committee on Veterinary & Livestock Development, State Inspection for Plant Quarantine

27

Further stimulation of attracting investments in trade infrastructure, agri-logistics centers, food safety laboratories, sanitary and phytosanitary systems, as well as the necessary equipment in order to reduce costs and overcome technical barriers, uninterrupted supply of domestic agricultural products.





### PRIORITY 3

## REDUCING THE ROLE OF THE STATE AND ATTRACTING PRIVATE INVESTMENT

### STRATEGIC CHALLENGES:

The direct participation of the state in the supply of resources for farmers, as well as the production and marketing of products, limits the attraction of private investment in the sector. The effective use of funds from credit lines of international financial institutions is limited by the under-development of advisory services for agri-businesses, a lack of business management skills, human resources in the agro-industrial complex and the banking sector. There are no incentives to promote the use of good agricultural and environmental practices (GAEP), good manufacturing practices (GMP) and other standards. There are also no structures, systems or mechanisms for independent monitoring and evaluation of investment impact effectiveness.

### STRATEGIC OBJECTIVES:

The main objective of this strategic priority is therefore to create an effective system to facilitate the attraction of private investment for the modernization, diversification and sustainable development of the agri-food sector.

### KEY STRATEGIC

**ACTIONS:** that are planned to contribute to the achievement of these goals include:

- Cessation of public procurement of agriculture commodities, with the exception of strategic purchases necessary to ensure price stability in the domestic market;
- Improving financial support mechanisms for agricultural producers from the state, including subsidizing the interest rate of commercial loans, allocated for the production of certain strategically important agricultural products;
- Improving lending and insurance mechanisms in accordance with the strategic priorities and needs of the agri-food sector;
- Improving the activities of the State Fund for Entrepreneurship Support under the Agency for the
- Development of Small Business and Entrepreneurship;
- Introduction of a “warehouse certificate” mechanism when crediting the agricultural producers;
- Expansion of the Uzbek Commodity Exchange trade in agricultural products;
- Development of transparent partnership mechanisms by introducing additional mechanisms and financial instruments, as well as ensuring equal access for market participants; Increasing competition in the market of resources and services through the privatization of non-strategic state enterprises in the field of resources and services supply;
- Abolition of the practice of providing resources and the provision of services at the expense of preferential loans;
- Assistance and encouragement of initiatives on the basis of futures contracts between subjects of the agro-industrial complex;
- Improvement of the mechanism of land use rights as collateral by reviewing the market order of determining the value of the right to lease land;

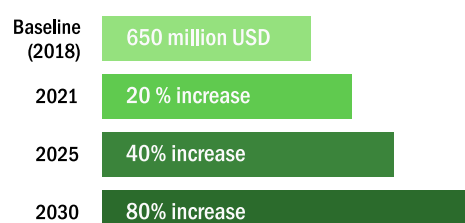
- Development of an investment program to ensure targeted attraction of credit lines of international financial institutions;
- Improvement of mechanisms for assisting commercial banks in the provision of credit resources for dekhkan farms and owners of land plots;
- Revision of agricultural crops allocation;
- Improvement of the motivation system for the implementation of intensive innovative technologies in agriculture.

## KEY PERFORMANCE INDICATORS AND TARGETS

Improved ranking in the World Bank Enabling the Business of Agriculture (EBA) Index



Increase in total value of attracted capital investments in agri-food business



## ROADMAP FOR IMPLEMENTATION

### SHORT TERM ACTIONS

1 March 1, 2020



The Ministry of Agriculture, Ministry of Finance, Central Bank, stakeholder ministries and agencies

Sophistication of mechanism for the government support of agriculture products producers. Thereat, the following is envisaged:

- revisiting the activities of the fund for the government support of agriculture under the Ministry of Finance of the Republic of Uzbekistan
- subsidise the interest rates of loans allocated for producing individual strategically important agriculture products;
- improve financial literacy of agriculture products producers are envisaged.

May 1, 2020



The National Commodity Exchange, Ministry of Agriculture, Ministry of Economy and Industry, Ministry of Investments and Foreign Trade

Expansion of the activities of the Uzbekistan Commodity Exchange in trading in agriculture products.

Thereat, the following is envisaged:

- development of transparent mechanism of cooperation through introduction of additional mechanisms and financial instrument, and establishment of equal conditions for the market participants.

2

3 Q4 2021



Ministry of Investment and Foreign Trade, Ministry of Agriculture, Ministry of Finance, Ministry of Economy and Industry

Development of investment programs to ensure targeted attraction of credit lines of international financial institutions based on the results of needs assessment of the agricultural sector in private investments and subsidized loans.

Q1 2021



Ministry of Agriculture, Ministry of Finance, Ministry of Water Resources

Development of additional measures for the development of public-private partnership mechanisms in the agri-industrial complex.

4

5



Q3 2021



Ministry of Agriculture, Ministry of Finance,  
Ministry of Economy and Industry

Increased competition in the market of material and technical resources through the privatization of non-strategic state enterprises in the sector of material and technical resources supply and provision of services to farmers and agricultural processing enterprises. At the same time:

- Abolish the practice of providing material and technical resources as well as services at the expense of state credit funds;
- Pilot implementation of standardized advance contracts to promote sustainable trade relations between agribusiness entities.

6



Q3 2021



Ministry of Finance, Central bank,  
Ministry of Agriculture

Transition to a system of subsidizing by the State Support Fund for Agriculture under the Ministry of Finance of exclusively interest rates on loans from commercial banks.



Q3 2022



Ministry of Finance, Ministry of Agriculture,  
Ministry of Economy and Industry

7

Ensuring a complete transition to an agricultural support system that stimulates the intensification of agricultural production.



Q1 2023



Ministry of Agriculture, Council of farmers,  
dekhkan farms and homeowners, Ministry of  
Economy and Industry

8

Removal of the state from the practice of crop allocation.



PHOTO CREDITS:  
USAID AGRICULTURAL VALUE CHAINS (AVC) ACTIVITY  
IN UZBEKISTAN

# ENSURING RATIONAL USE OF NATURAL RESOURCES AND ENVIRONMENTAL PROTECTION



## AGRICULTURAL LAND:

The lack of legal protection of individual land use rights currently constrains the effective management of land and limits the attraction of investments. Clear and transparent mechanisms for the distribution of land plots and for protecting the rights of land users have not been fully developed. In addition, the absence of legal sub-leasing mechanisms prevents the transfer of agricultural land to users with the greatest demand and potential.

## WATER AND IRRIGATION:

Only 20% of the 20 million ha of cultivated agricultural land is currently irrigated. Over the last 15 years, availability of irrigated land per capita has declined by 24% (from 0.23 ha to 0.16 ha). This is the result of population growth, reduced water supply and the transfer of agricultural land to other categories of land fund. According to forecasts, over the next 30 years, irrigated land may be reduced by another 20 to 25%.

Approximately 80% of the country's water resources come from transboundary watercourses. This underlines the importance of inter-regional cooperation for sustainable water resources management in Central Asia and in the Republic of Uzbekistan in particular. In the country, 70% of irrigation networks do not have anti-filtration coverage, as a result of which part of the water is lost during transportation to the fields. The existing irrigation infrastructure and most of the pumping stations have been in operation for more than 30–40 years and require reconstruction or overhaul.

Currently, drip irrigation is implemented on only 1.7% of irrigated lands. Given the high degree of dependence of agriculture on irrigation, the situation is set to worsen with increased aridity due to climate change and the continued use of traditional irrigation methods. According to the forecast of the World Resources Institute, by 2040, Uzbekistan will join 33 countries with the largest water shortages. Lower yields will lead to serious negative consequences for food security and the balance of payments, which emphasizes the need for a transition to sustainable water management and resource-saving technologies in crop cultivation. The lack of a mechanism to cover the water supply expenses for agricultural needs hinders the widespread adoption of water-saving technologies.

The introduction of new modern water legislation that complies with the Water Directive of the European Union Parliament (2000/60/EU) will ensure the development of the necessary regulatory framework for streamlining future water policies and introducing integrated water management methods.

## FORESTRY:

The Forest fund is one of the country's main natural resources, which occupies 11.1 million hectares or 25 percent of the total territory. While forested areas make up 3.2 million hectares (29 percent). In recent years, the Government paid special attention to the forest resources management. In 2017, the State Forestry Committee was created, the area of forests increased by 2.3 million hectares, 12 new forestry enterprises were created, and a number of measures were taken to strengthen the material and technical base. In particular, special measures were taken to create forests on the dry bottom of the Aral Sea, to expand the area of protective afforestation, to increase windproof green strips on agricultural lands, to create improved monitoring systems and to develop effective environmental education programs. Along with this, effective management of forestry resources is a key priority for the sustainable development of agriculture and rural areas, aimed at minimizing the negative effects on the environment and climate caused by the unsustainable use of natural resources.

## AGRI-ENVIRONMENT:

With regard to national agro-ecological minimum standards, these are based on outdated technologies. Moreover, when developing agricultural practices, environmental factors are not taken into account. The integration of environmental factors is necessary while improving agri-ecological practices and developing standards and mechanisms for the protection of natural resources.

## STRATEGIC OBJECTIVES:

The main objective of this strategic priority is to ensure the rational and efficient use of natural resources and environmental protection in the sustainable development of agriculture.

## KEY STRATEGIC

**ACTIONS:** that are planned to contribute to the achievement of these goals include:

### Water resources:

- 20% reduction in water use per hectare of irrigated area until 2030;
- Improvement of state support mechanisms for local producers and buyers of water-saving technologies;
- Improvement of the water resources management system;
- Developing a procedure for reimbursement of agricultural water supply costs using smart technologies (mini measuring stations and "smart stick");
- Development and piloting of public-private partnership projects in irrigation to increase the efficiency of land and water use, as well attracting private investment in agriculture.

## Agriculture Land resources:

- 🔑 Development and implementation of good agricultural and environmental practices (GAEP);
- 🔑 Introduction of amendments to the Land Code of the Republic of Uzbekistan, ensuring the improvement of mechanisms of protection of land use rights and introduction of the procedure for providing land plots for dekhkan farms for temporary use, while maintaining the right of inherited lifetime possession of the land, as well as introduction of amendments and additions, stipulating the primary right of rejection by adjacent land users upon termination of the land use right in the established manner;
- 🔑 Maintaining and enhancing soil fertility by introducing effective fertilizer use practices based on soil-climatic conditions through the purchase of mobile soil analysis laboratories;
- 🔑 Improving the cadastral system of land registration for agricultural land and integrating a single information system with the real property registration system for land and property use rights;
- 🔑 Revision of the cadastral valuation system for agricultural land;
- 🔑 Development of the cadastral system of agricultural lands, modernization of facilities and infrastructure of institutions in the field of land management.

## Forestry resources:

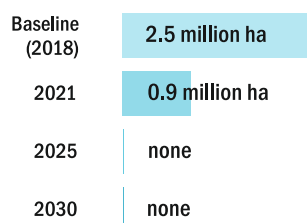
- 🔑 Improving the system of training and retraining of personnel in forest resources management;
- 🔑 Improvement of forest resources management system;
- 🔑 Introduction of modern methods of forest resources assessment and monitoring;
- 🔑 Development of a system to ensure registration of forest resources at market price

## Agri-environment and climate change adaptation and mitigation:

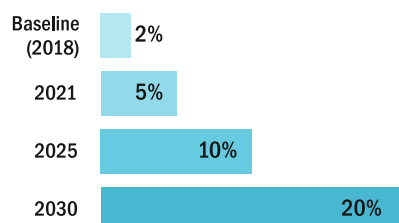
- 🔑 Adoption of a national action plan to prevent the effects of climate change;
- 🔑 Strengthening institutional capacity in the field of biosafety, control of natural resources, pesticides and chemicals in agriculture.
- 🔑 Development of minimum environmental standards and requirements based on appropriate agricultural and environmental practices (GAEP) to monitor the impact of agricultural production on the state of ecosystems and biotopes.

## KEY PERFORMANCE INDICATORS AND TARGETS

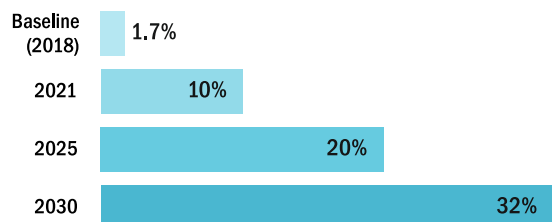
Total farmland area under production for state procurement



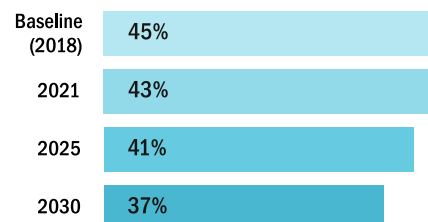
Increase in the number of farmers applying Good Agriculture & Environmental Practices and International standard for quality management



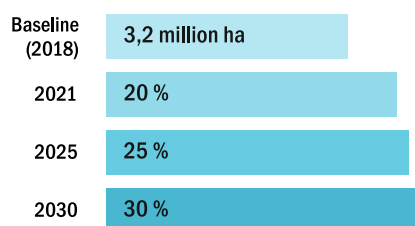
### Total land area irrigated with water-saving technologies



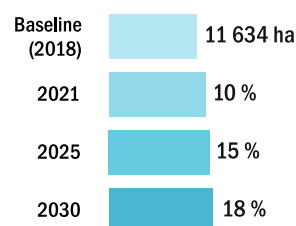
### Reduction in total % of land affected by “high rates” of salinity



### Increase in the total area of forest plantations



### Increase in the total area allocated for nut crops (i.e. pistachio, walnut and almonds)



## ROADMAP FOR IMPLEMENTATION

### SHORT TERM ACTIONS

1



March 1, 2020



The Ministry of Water Resources, State Land Geodesy Cadaster Committee, Ministry of Agriculture

Implementation of up-to-date technologies for monitoring of the land ameliorative condition and salinization.



April 1, 2020



The State Committee on Land, Geodesy Cadastre, Ministry of Agriculture, Ministry of Development of Information Technologies and Communications

Sophistication of the Cadaster system of the agriculture land registering and integration with unified information system of title for immovable property for registering land use rights and title.

3



December 1, 2020



State Land Geodesy Cadaster Committee, The Ministry of Agriculture, Ministry of Water Resources, Uzbekistan Council of Farmers, Individual Farms, and Backyard Land Owners

Amending the Land Code of the Republic of Uzbekistan envisaging the following:

- revisiting of the conditions for termination of rental agreement with the land users and development of pertinent requirements for a simplified and transparent mechanism;
- sophistication the mechanism of land use right protection;
- allocation of land on preferential terms in order to expand activities of farming entities;
- to grant rights to use additional plots of land to the farming entities in order to implement prospective investment projects;
- to introduce priority refusal right with regard of rental of the plots of land for the users of adjacent plots of land;
- to revisit the system of cadaster value of agriculture land.



December 1, 2020



The State Committee on Ecology and Environment Protection, Ministry of Agriculture, Uzbekistan Council of Farmers, Individual Farms, and Backyard Land Owners, State Land Geodesy Cadaster Committee

Development and introduction of due agriculture and environmental practices (GAEP). Thereat, the following is envisaged:

- development of guidelines for compliance with the principled of Good Agriculture and Environmental Practices designed for producers of agriculture products;
- implementation of Good Agriculture and Environmental Practices (GAEP) standards for the agriculture producers as well as Good Manufacturing Practice (GMP) standards for agrarian entrepreneurs and other standards.

3

4

**5**

December 30, 2020



The Ministry of Agriculture, Ministry of Water Resources, State Committee on Ecology and Environment Protection, State Forestry Committee, Uzbekistan Council of Farmers, Individual Farms, and Backyard Land Owners

**Promotion of the practices safe for agriculture and environment. Thereat, propagation of the following is envisaged:**

- step by step establishment of the species of crops adjusted to the climate change, approaches of permaculture and agriforestry, environmental standards;
- surveillance of pesticides use;
- integrated pests control;
- management of agriculture waste is envisaged.



December 30, 2020



The Centre of Hydrometeorology Service, State Committee on Ecology and Environment Protection, Ministry of Agriculture, State Committee for Veterinary and Developing of Livestock Farming

**6**

**Adoption of the national action plan to prevent impact of climate change. Thereat, the development of intergrated measures to adjust to the climate change and reduce the green house gases is envisaged.**



Permanently



The Ministry of Agriculture, State Land Geodesy Cadaster Committee

**7**

**Preservation and improvement of soil fertility with introduction of efficient fertilizers' use practices depending on the soil and climate conditions by means of expansion of operations of soil analysis laboratories.**

## MEDIUM AND LONG TERM ACTIONS

**8**

Permanently



Ministry of Agriculture, Goskomzemgeodezkadastr

**Taking measures to preserve and further improve soil fertility, introduce effective system of fertilizers use based on soil and climatic conditions by expanding the activities of mobile soil analysis laboratories.**



Q1 2021



Goskomzemgeodezkadastr, Ministry of Agriculture, Ministry of Water Resources

**12**

**Implementation of a pilot program for the integration of adjacent agricultural land plots in order to increase the efficiency of land use by farmers.**

**9**

Q1 2021



Goskomzemgeodezkadastr, Ministry of Agriculture, Ministry of Water Resources, Council of farmers, dekhkan farms and homeowners

**Introduce amendments and additions to the Land Code, foreseeing:**

- systematization of all applicable regulatory documents defining tools and mechanisms for the protection of land use rights;
- invalidation of the right to lease land on the basis of GAEP standards and other relevant norms;
- introduction of the right of first refusal when renting land plots.



Q1 2021



Goskomzemgeodezkadastr, Ministry of Water Resources, Ministry of Agriculture, Ministry of Investment & Foreign Trade, Ministry of Finance

**13**

**Development and pilot implementation of public-private partnership projects in the field of irrigation to increase the efficiency of land and water resources, as well as to attract private investment in agriculture.**

**10**

Permanently



Ministry of Water Resources, Goskomzemgeodezkadastr, Ministry of Agriculture

**Regular monitoring of the reclamation state and degree of salinity of the land based on modern technologies.**



Q2 2021



Ministry of Water Resources

**14**

**Revision of water management system.**

**11**

Q4 2020



Central bank, Ministry of Agriculture, Ministry of Water Resources, Council of farmers, dekhkan farms and homeowners

**Simplification of the procedure for using a land plot rental rights as collateral for obtaining loans, taking into account the introduction of market value pricing mechanisms.**



Permanently



Council of farmers, dekhkan farms and homeowners, Ministry of Agriculture, State Committee for Ecology and Environmental Protection, Goskomzemgeodezkadastr

**15**


**Monitoring the implementation of good agricultural and environmental practices GAEP.**

16  Q4 2021

 Ministry of Agriculture, Goskomzemgeodezkadastr, Academy of Sciences, Council of Ministers of the Republic of Karakalpakstan and regional authorities

Optimization of land plots of agricultural research institutes based on an assessment of their use in order to develop a plan for further use in accordance with research priorities.

17  Q1 2022

 State Committee for Ecology and Environmental Protection, Ministry of Agriculture


Strengthening institutional capacity in the area of biosafety, control over the use of natural resources, pesticides and chemicals in agriculture.

18  Q2 2022

 State Committee for Ecology and Environmental Protection, Ministry of Agriculture, Council of farmers, dekhkan farms and homeowners

Development and implementation of minimal environmental standards and requirements based on good agricultural and environmental practices (GAEP) to monitor the impact of agricultural activities on the state of ecosystems and biotopes.

 Q4 2022

 Ministry of Water Resources, Ministry of Agriculture, Ministry of Innovative Development, Ministry of Finance, Uzbekhydrogeology Committee

Implementation of an effective system of payment for water services associated with the delivery of water and its distribution between water consumers through the use of smart technologies (mini-measuring stations and “smartsticks”).

 Q2 2023

 Goskomzemgeodezkadastr, Ministry of Agriculture

Creating a secondary market to ensure the free transfer of land tenure rights from inefficient users.

 Q1 2023

 Goskomzemgeodezkadastr, Ministry of Investment and Foreign Trade, Ministry of Agriculture, Council of farmers, dekhkan farms and homeowners

Development of an investment program aimed at development of a cadastral system of agricultural land, institutional capacity and the modernization of infrastructure in the field of land management in order to increase the effectiveness of state policies & improve financing mechanisms based on land tenure rights.

19

20

21

PHOTO CREDITS:  
FAO UZBEKISTAN





# DEVELOPMENT OF MODERN PUBLIC ADMINISTRATION SYSTEM

## STRATEGIC CHALLENGES:

Most of the functions of government agencies in the agro-industrial complex are focused on production processes, and some of these functions can be transferred to the private sector. Despite significant growth in the horticulture and livestock industries, most of the service infrastructure, material supply structures, as well as research and educational institutions are focused on the production of raw cotton and cereals. Problems in the sector are also exacerbated by a lack of modern and high-quality infrastructure for the provision of services that meets international standards and requirements. This primarily goes for public services related to food safety, veterinary and phytosanitary services. It is also necessary to develop the private sector, that provides certification and advisory services to manufacturers and processors to enter new markets. Currently, a number of services are provided and monopolized by state-owned enterprises which leads to negative consequences in attracting private investment in the field and creating competition in the supply of resources and the provision of marketing services.

## STRATEGIC OBJECTIVES:

The main goal of this priority area is to revise the existing institutional structures through the creation of systems, services and coordination mechanisms that can meet the needs of the agrarian market.

## KEY STRATEGIC

**ACTIONS:** that are planned to contribute to the achievement of these goals include:

- Functional assessment of the Ministry of Agriculture (Management Functional Assessment Model - MFAM) and based on the results, review of the organizational structure and activities of units in order to determine new authorities and areas of activity of the ministry;
- Reforming the public administration system in the agri-food sector in order to coordinate the activities of organizations responsible for the implementation of the Strategy;
- Development of incentive mechanisms by assessing the effectiveness of the activities of ministries and agencies in the sector and enhancing strategic and project management capacity of management personnel;
- Development of public-private partnership model to provide additional services in the network;
- Organization of a forum for stakeholders in the industry (which includes public, private and public organizations);
- Organization of a forum for the Government and partners (all donors and international financial institutions involved in the sector support) to develop agriculture and the food industry.

# KEY PERFORMANCE INDICATORS AND TARGETS

		Baseline (2018)	2021	2025	2030
5.1	Establishment of sector coordination mechanisms	Establishment of sector coordination mechanisms for: - Inter-government - Public-private stakeholders - Government & development partners/donors	Publication of annual reports on the state of the agri-food sector (supported by monitoring and evaluation system)	Publication of annual reports on the state of the agri-food sector (supported by monitoring and evaluation system)	Publication of annual reports on the state of the agri-food sector (supported by monitoring and evaluation system)
5.2	Conducting a functional analysis of public administration structures in the sector	-	Functional reviews completed for: agriculture; veterinary; phytosanitary; food safety; irrigation	Functional reviews at regional and district level completed for all relevant governance structures	Functional reviews of all relevant subordinate bodies completed
5.3	Approval and implementation of sector institutional restructuring plans	-	Approval and implementation of institutional restructuring plans for: agriculture; veterinary; phytosanitary; food safety; irrigation	Institutional restructuring plans for all relevant regional and district level governance structures approved and implemented	Institutional restructuring plans for all relevant subordinate bodies approved and implemented
5.4	Approval of long-term strategies for development of public services	Not approved	Strategies approved and being implemented for: - Veterinary Services - Phytosanitary Services - Food Safety Services - Advisory Services - Irrigation Services	Regular publication of monitoring and evaluation reports on progress with implementation of public service strategies	Regular publication of monitoring and evaluation reports on progress with implementation of public service strategies
5.5	Privatization of state-owned enterprises in Agri-food sector	Conducting audit of all state-owned enterprises in agri-food sector	Divestment plan approved and implemented for state-owned share in agri-food sector enterprises	At least 50% of divestment plan completed	Divestment plan fully completed

## ROADMAP FOR IMPLEMENTATION

### SHORT TERM ACTIONS

1



May 1, 2020



The Ministry of Agriculture

Holding functional evaluation of activities of the Ministry of Agriculture of the Republic of Uzbekistan, by the results of which the organizational structure and functions divisions thereof will be reconsidered in order to identify new powers and areas of activities of the ministry.

Thereat, the following is envisaged:

- sophistication of the vertical and horizontal systems of governance;
- step by step decreasing the role of government services and transfer them to the private sector;
- development of professional development programmes for cadre capacity building.



April 1, 2020



The State Agency for Management of the State Assets, Ministry of Finance, Ministry of Economy and Industry, Ministry of Agriculture

2

Privatization of the enterprises with the government share in the business processing cereal grains and cotton, resources supply and provision of agriculture services.

## MEDIUM AND LONG TERM ACTIONS

3



Q4 2021



Ministry of Agriculture, Ministry of Development of Information Technologies and Communications, Ministry of Economy & Industry, State Committee on Statistics

Creation of a website providing online public services, information on changes in the agri-food market, as well as on the progress of sector reforms and achieved results.

4



Q4 2021



El-Yurt Umidi Foundation, Ministry of Agriculture, Ministry of Higher and Secondary Special Education, Youth Union

Implementation of internship programs and the provision of scholarships for training of managerial staff among young specialists, providing for the organization of short-term, medium-term and long-term programs for the provision of scholarships and employees exchange programs in priority areas such as agricultural economics, agricultural business management and marketing, agri-food products trade and other priority areas.



Q4 2021



Ministry of Justice, Ministry of Agriculture, Ministry of Water Resources, State Committee for Veterinary and Livestock Development, Council of farmers, dekhkan farms & homeowners, Goskomzemgeodezkadastr

5

Development of a long-term strategy for the development of public services in following areas:

- veterinary control, animal health protection and livestock development;
- phyto-sanitary control and plant protection services;
- food safety and consumer rights protection services;
- advisory services in the field of agriculture and agribusiness and applied research activities;
- providing food relief support for socially vulnerable groups of the population;
- services to promote the effective use of land and water resources in agriculture.



Q3 2025



Ministry of Agriculture, Ministry of Finance

6

Implementation of outsourcing practices for the provision of important additional services in the industry with the support of the private sector, development of an effective model of public-private partnership.





## PRIORITY 6

# GRADUAL DIVERSIFICATION OF PUBLIC EXPENDITURES ON NETWORK SUPPORT

### STRATEGIC CHALLENGES:

Currently, public expenditure in support of the agriculture sector, as a share of public expenditures in the GDP of the country (1.68%) is three times higher compared to middle-income non-OECD countries (0.62%) and ten times more than OECD countries (0.17%). Despite this, agricultural efficiency and competitiveness, as well as producer incomes, remain low. The bulk of public sector financing is spent on irrigation systems (63%) and often aims to support the production of cotton and cereals. Most of the budget funds are spent on electricity costs for water pumping and operation and maintenance of existing irrigation systems. As a result, not enough is spent on development and modernization of irrigation and drainage systems.

A large part of support for general services is currently recorded in the budget framework under the category of “miscellaneous,” indicating a lack of strategic planning for public spending in the sector. There is also no systematic linkage within the budget system between International finance and credit programs in support of the sector (more than \$ 3.5 billion) and large government investment programs or strategic planning processes.

For the development of agriculture, it is necessary to improve the financing system and revise the amounts of allocated budget funds for state programs and services in the following areas: (i) Environmental protection, increasing soil fertility and introducing water-saving technologies; (ii) Food safety, animal disease control, veterinary and phytosanitary services; (iii) Support of various forms of associations (cooperatives, clusters, production associations); Improvement of monitoring systems for agricultural markets and the collection of statistical data, development of market and transport and logistics infrastructure; (v) Developing a system of applied research and development, education and knowledge dissemination in agriculture.

### STRATEGIC OBJECTIVES:

The main objective of this area is to increase the utilization efficiency of agricultural investments through the gradual redistribution of public financial resources provided for basic public services and implementation of structural reforms in accordance with new priorities of agrarian policy.

### KEY STRATEGIC

**ACTIONS:** that are planned to contribute to the achievement of these goals include:

- Revising the distribution of expenditures on agricultural financing, increasing the allocated funds for research and development activities, a network for disseminating agricultural knowledge, as well as information and consulting services;
- Carrying out a comprehensive audit of activities of all non-budget funds related to agriculture and the food industry and to develop recommendations for the gradual transfer of service provision to the private sector;
- Implementation of a program to expand the use of international technical assistance funds to ensure the effective implementation of the medium-term budget program;
- In-depth analysis of the taxation system in the agricultural sector and the development of specific measures to reduce the tax burden on agricultural producers.

## KEY PERFORMANCE INDICATORS AND TARGETS

	Baseline (2018)	2021	2025	2030	
6.1	The increase in the state budget expenditures on services of the agri-food sector not related to irrigation	20% of total sector expenditure for agriculture	30 % of total sector expenditure for agriculture	35 % of total sector expenditure for agriculture	40 % of total sector expenditure for agriculture
6.2	Gradual increase of public spending on research in agriculture (as a percentage from agriculture GDP)	0.02%	0.05%	0.5%	1%
6.3	Introduction of mid-term expenditure framework	Mid-term expenditure for 2020-2022 prepared and approved	Mid-term expenditure for 2020-2022 implemented	Mid-term expenditure for 2020-2022, Mid-term expenditure for 2025-2027	Mid-term expenditure for 2028-2030 implemented

## ROADMAP FOR IMPLEMENTATION

### SHORT TERM ACTIONS

1



March 1, 2020



The Ministry of Agriculture, Ministry of Finance, Ministry of Economy and Industry

Cancellation of system of discounts and premiums used for the government purchasing prices of cereal grain crops produced by the agriculture entities on irrigated lands, depending on their productivity.

2



June 1, 2020



The Ministry of Agriculture, Ministry of Finance

Reconsidering principles of distribution of expenditures for financing agriculture, envisaging increase of funds allocation for research and experiments and design work, and information and consultancy services



December 1, 2020



The Ministry of Agriculture, stakeholder ministries and agencies

3

Development of recommendations on step by step transferring the services related to agriculture and food industry to the private sector.



March 1, 2020



The Ministry of Finance, Ministry of Economy and Industry, Ministry of Agriculture

4

Till expansion the activities of the Fund for the Government Support of Agriculture under the Ministry of Finance of the Republic of Uzbekistan, in 2020, to define the interest rate on the loans allocated for financing expenditure for raw cotton and growing cereal grain crops in the amount of 50 percent of the Central Bank of the Republic of Uzbekistan refinancing interest rate (of that 2.0 percent is bank margin).

### MEDIUM AND LONG TERM ACTIONS

5



Q4 2021



Ministry of Agriculture, Ministry of Finance

Implementation of a program to expand access to international technical assistance in order to effectively implement medium-term budget programs.



Q4 2021



Ministry of Agriculture, Ministry of Finance, Ministry of Investment and Foreign Trade, Ministry of Water Resources, Council of farmers, dekhkan farms and homeowners

7

Expansion of the range of direct support tools to agricultural producers ranging from subsidized loans to a comprehensive set of support measures aimed at stimulating investment and on-farm services at the expense of the State budget aimed at accelerating structural changes.

6



Q3 2021



Ministry of Agriculture, Ministry of Finance, State Tax Committee

Analysis of the taxation system in the field of agriculture and development of recommendations to reduce the tax burden on agricultural producers.



## PRIORITY 7

# DEVELOPMENT OF RESEARCH, EDUCATION AND SYSTEM OF INFORMATION AND ADVISORY SERVICES IN AGRICULTURE

### STRATEGIC CHALLENGES:

The absence of a well-functioning agricultural knowledge and information system (AKIS) that can effectively link research, education and the provision of advisory and extension services remains one of the most significant constraints to sector development. Currently, public investment in research amounts to 0.2% of the total agricultural budget. The lack of effective mechanisms for interaction between farmers and agri-business, based on government-funded research, significantly limits practical implementation of the research results funded by the state.

The majority of local varieties of agricultural crops have low productivity and do not meet foreign market requirements. Dependence on imported varieties of agriculture crops which are expensive and inappropriate for local conditions is growing.

Education and training courses, education systems, and the form and methods of teaching in educational institutions, do not meet modern requirements. An inter-sectoral and inter-departmental coordination system is required to study labor market requirements and introduce new specialties. At present, the country does not have modern private structures for disseminating agricultural knowledge and information.

### STRATEGIC OBJECTIVES:

Creation of a modern, integrated and flexible system in the areas of agriculture, food supply, education, training and information and advisory services is the main purpose of this strategic priority.

### KEY STRATEGIC

**ACTIONS:** that are planned to contribute to the achievement of these goals include:

- Radically reforming the activities of scientific research institutions in the sector;
- Reforming the system of agricultural education and training with the technical support of donor organizations;
- Auditing of existing administrative systems to identify the strengths and weaknesses of public services and systems for agribusiness entities, as well as developing plans for restructuring and simplification;
- Establishment of the Center for Coordination of Environmentally Safe Methods and Agricultural Practices and Technologies, information and advisory services on mitigation and adaptation to climate change;
- Training of a dedicated staff for agro-technology information and extension centers;
- Establishment of information and extension centers in all regions of the country on the basis of public-private partnerships.

## KEY PERFORMANCE INDICATORS AND TARGETS

	Baseline (2018)	2021	2025	2030	
7.1	Establishment of the Coordination Council on integration of agricultural science, education and production as well as introduction of mid-term framework for funding research activities	-	Approval and implementation of mid-term research budget for 2019-2021	Development and approval of mid-term research budgets for subsequent three-year cycles	Development and approval of mid-term research budgets for subsequent three-year cycles
7.2	Increase in number of graduates of education institutions employed in agri-businesses	2180	10%	30%	50%
7.3	Increasing the number of farmers with access to advisory and extension services	51.1 thousands	10%	35%	50%
7.4	Increase in the number of farmers satisfied with extension centers and advisory services	41.1 thousands	20%	40%	80%

## ROADMAP FOR IMPLEMENTATION

### SHORT TERM ACTIONS

1



April 1, 2020



The Ministry of Agriculture, Ministry of Higher and Secondary Special Education, Ministry of Innovative Development

To exempt materials, equipment, vehicles, assemblies, appliances, instruments, spare parts, remote-piloted vehicles (for the purpose of training cadres in the area of digitalization) used for research work of research institutions and teaching activities of educational institutions in the area of agriculture imported and that are not produced in the country of customs fees (except VAT) according to the list determined by the Cabinet of Ministers.

2



October 1, 2020



The Ministry of Agriculture, Ministry of Innovative Development, Ministry of Investments and Foreign Trade, Ministry of Economy and Industry, State Committee for Veterinary and Developing of Livestock Farming, State Land Geodesy Cadaster Committee

Radical reforms of the operations of research institutions and the whole research in the area of agriculture and industry complex. Thereat, the following is envisaged:

- in order to optimise the research institutions, independent assessment of efficiency of their performance;
- establishment of the Coordination Council in order to determine priorities in the areas of research, coordination and monitoring of the projects of agriculture research;
- carrying targeted research aimed at implementation of advanced methods and technologies of running agriculture and environment protection;
- development of feasibility studies of projects on implementation of public-private partnership mechanisms in carrying out research with participation of the local and international organizations and evaluation of efficiency;
- establishment of the system for assessing and incentivation of researchers on the basis of efficiency indicators;
- sophistication of legal basis for diversification of funding sources, including attraction of financial resources from the private sector;
- implementation of incentive mechanisms for carrying out research programmes together with international research and educational institutions;



March 1, 2020



The Ministry of Higher and Secondary Special Education, Ministry of Economy and Industry, Ministry of Agriculture, Ministry of Water Resources, State Committee for Veterinary and Developing of Livestock Farming, State Forestry Committee, State Land Geodesy Cadaster Committee

3

Pro bono transfer, as established, of laboratory equipment, mini-shops, agriculture machinery, training literature of professional colleges of agricultural specialization, imported through funds of the international financial institutions, to the professional educational institutions transferred to the system of Ministry of Agriculture and its higher educational institution.

- securing targeted engagement of grant fund aimed at increasing knowledge level and practical skills, best practices exchange within framework of investment projects in the area of agriculture, implemented with participation of the international financial institutions and international organizations, on concurrence with the relevant ministries.



March 1, 2020



The Ministry of Higher and Secondary Special Education, Ministry of Agriculture, Ministry of Economy and Industry, Ministry of Innovative Development

4

Establishment of branches of the specialized chairs of the Tashkent State Agrarian University at the higher educational institutions of the Republic of Karakalpakstan and the regions, for training of highly professional cadre in the area of fruits and vegetables production and vine growing, growing of fruits and vegetables in the state-of-art green houses, storing and processing of agriculture products.

- Thereat, the following is envisaged:
- starting from the academic year 2019/2020, quotas for admission for bachelor degree education in higher education institutions, where the specialized chairs of the Tashkent State Agrarian University to be established in the areas of Horticulture-Viniculture, Vegetable production, gourd field, and potato production, Establishment and running green houses, as well as for respective master's degree education;
  - allocation, as an exception, in 2020, of additional targeted quota for admission in the basic doctoral study on the specialization Horticulture-Viniculture, Vegetable production, and Storage and processing of agriculture products.

5

October 30,  
2020

The Ministry of Agriculture, Ministry of Water Resources, Ministry of Economy and Industry, Uzbekistan Council of Farmers, Individual Farms, and Backyard Land Owners, State Committee for Veterinary and Developing of Livestock Farming, State Committee for Veterinary and Developing of Livestock Farming

Establishment of a Coordination Centre on information and consultation services.

Thereat, the following is envisaged:

- introduction of the procedure of registration and certification of consultants;
- development of consultation centres and sources of financing, in particular, on the terms of public private partnership, as well as development of the government support mechanism for engagement of the international donors' funds;
- assistance to wide application of measures of due agriculture and environmental practice (GAEP), as well as mitigation of the impact of and adaptation to climate change.

6

Starting from  
2020-2021  
academic year

The Ministry of Agriculture, Tashkent State Agrarian University

To establish vocational schools at the professional education level on the basis of professional colleges transferred to the structure of the Ministry of Agriculture of the Republic of Uzbekistan and the Tashkent State Agrarian University, and integrated with the system of higher education.

December 1,  
2020

The Ministry of Agriculture, Ministry of Innovative Development, Ministry of Water Resources, Ministry of Economy and Industry, Uzbekistan Council of Farmers, Individual Farms, and Backyard Land Owners, State Committee for Veterinary and Developing of Livestock Farming, Ministry of Investments and Foreign Trade

7

Under technical assistance from donor organisations, to reform agriculture education and professional training system.

Thereat, the following is envisaged:

- assessment of agriculture educational institutions capacity;
- establishment of up-to-date learning courses and retraining programmes, exchange of faculty;
- organizing in service training courses at the ministries and agencies of the branch;
- upgrading the material and technical basis of agriculture educational facilities through public private partnership;
- empowering the educational facilities through attraction of staff speaking foreign languages and possessing experience of participation in the international conferences, scholarships, and teaching in the international educational institutions;
- taking into account needs of agribusiness and international practices, optimization of number of the government higher educational institutions, as well as areas of education and majors;
- further development of cooperation with leading foreign educational institutions and research centres, as well as with international partners.

## MEDIUM AND LONG TERM ACTIONS

8



Q2 2021



Ministry of Agriculture, Ministry of Innovative Development, Ministry of Water Resources, Ministry of Economy and Industry, State Committee for Veterinary and Livestock Development, Ministry of Investment and Foreign Trade

Development of advisory and information services for the dissemination of knowledge for farms and agribusiness at the republican, regional and local levels. At the same time, provide for:

- Provision of consulting services to agribusiness entities and assessment of the regulatory framework;
- Diversification of funding sources, including expansion of financing opportunities from the private sector;
- Development of effective mechanisms for transferring research results and introducing innovations to agricultural producers.



Q1 2021



Ministry of Agriculture, Ministry of Finance, Ministry of Economy and Industry, Ministry of Development of Information Technologies and Communications, Council of Ministers of the Republic of Karakalpakstan and regional authorities

9

Implementation of information and advisory services systems in all regions of the country on the basis of public-private partnership.

# DEVELOPMENT OF RURAL AREAS



## STRATEGIC CHALLENGES:

Approximately 16.4 million people (49.4% of the total population) reside in rural areas of Uzbekistan (2018). The country also has a high birth rate (23.3 pro mil) and correspondingly, a labor force surplus in rural areas. People under 25 years represent 45.5% of the population and over 55% of the population is under 30.

Public services in rural areas, as well as transportation and information and communication links, remain limited. The development of comprehensive strategies and programs, based upon a thorough assessment of regional needs and comparative advantages, is needed.

In the agrarian sector, supportive measures are often directed directly to farmers and other agricultural producers. Analysis of foreign countries indicates that rural economic development needs to be explicitly linked to agricultural development to help ensure its success, as well as the inefficiency of reforms, based on the provision of subsidies to address locally important socio-economic problems.

Rural development policies supported by the Ministry of Economy tend to focus predominantly on addressing regional economic imbalances in favor of large urban centers and support is only provided to a small segment of the rural population – farmers and other entrepreneurs engaged in agriculture while however, the countryside remains aloof.

## STRATEGIC OBJECTIVES:

Ensuring sustainable development of rural areas is the main purpose of this strategic priority.

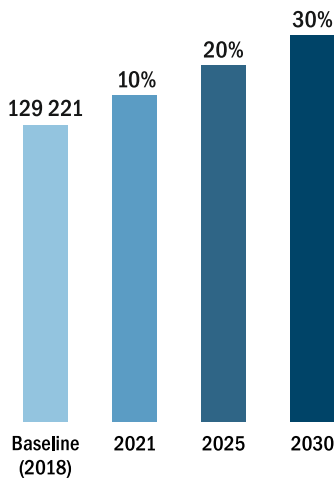
## KEY STRATEGIC

**ACTIONS:** that are planned to contribute to the achievement of these goals include:

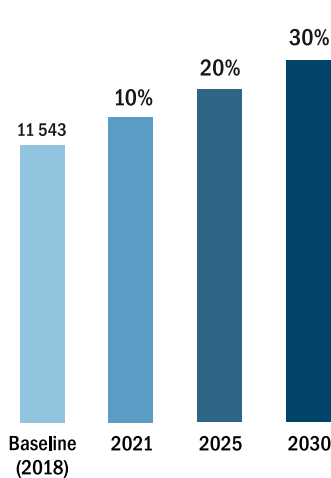
- Reforming the system of public administration in rural development;
- Detailed assessment of real needs for rural development;
- Improving the regulatory framework for government support and protection of rural communities and decentralization of decision-making;
- Development and pilot implementation of transparent mechanism of attraction of grant funds and investments for establishment and development of non-agricultural enterprises, mobilization of existing capacity of mahallas, development of public-private partnership between citizens, agricultural business, civil society institutions and state bodies;
- Development of the National Rural Development Program.

# KEY PERFORMANCE INDICATORS AND TARGETS

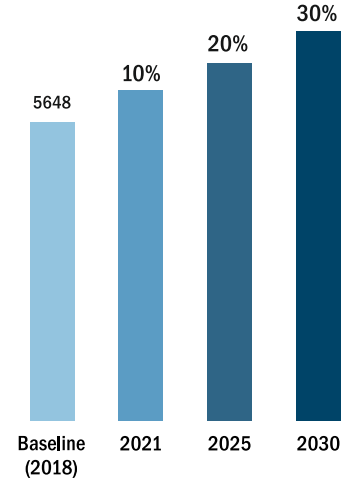
Increase in the total number of small-scale businesses (micro firms) in rural areas



Increase in women-led enterprises in rural areas



Increase in youth-led enterprises in rural areas



## SHORT TERM ACTIONS

1



From March 1, 2020, on annually



The Ministry of Investments and Foreign Trade, Ministry of Economy and Industry, Ministry of Agriculture

To publish catalogue of data and information on the large local manufacturers and processing entities for the purpose of promotion of agriculture industrial export.

2



May 1, 2020



The State Committee for Statistics, Ministry of Agriculture

Collect, compare, and publish data on economic indices (cost, revenue, profit, profitability rate) of production of the main types of agriculture products.

3



July 1, 2020



The Ministry of Agriculture, Ministry of Innovative Development

Development “Smart Agriculture” government programme.

4



August 30, 2020, later on bi-annually



The Uzbekistan Council of Farmers, Individual Farms, and Backyard Land Owners, Ministry of Agriculture, State Committee for Statistics

Publication of a collection of information (handbook) on running a farm, comprising data on efficiency of production, government support of branches, labour laws, taxation, loans, and other necessary information.



September 1, 2020



State Committee for Statistics, Ministry of Agriculture, Ministry of Investments and Foreign Trade

5

To adopt the plan for development of statistics of agriculture and food products.

Thereat, the following is envisaged:

- assesment of information communication technologies, digital services, and data bases used in the sphere;
- upgrading of material and technical basis and step by step digitalization of data collection and analysis;
- participation in the inter-state data exchange in the area.



December 30, 2020, further on permanently



The Ministry of Agriculture, Ministry of Economy and Industry, Ministry of Investments and Foreign Trade, State Committee for Statistics

6

Publication of Annual Agriculture Report comprising the results implemented in the branch, as well as prospective measures of the government policy.



Q1 2020



Ministry of Economy and Industry, Ministry of Employment and Labor Relations, Ministry of Agriculture, Ministry of Education, Ministry of Preschool Education, Ministry of Transport, Ministry of Energy, Ministry of Investment and Foreign Trade, Ministry of Health

7

Development and monitoring of the implementation of the “Concept of sustainable rural development for 2020–2025”.

## MEDIUM AND LONG TERM ACTIONS



# CREATING TRANSPARENT NETWORK STATISTICS AND DATA COLLECTION SYSTEMS

## STRATEGIC CHALLENGES:

The systems for collecting data and information in the agri-food sector are based on outdated mechanisms and practices developed as part of a centrally planned economy. Estimates of production, yield and performance misrepresent the actual situation in the field. The lack of accurate and reliable data constrains the design of new legislative acts and also does not allow for an objective assessment of their impact on the sector. The lack of reliable marketing information significantly limits the ability of farmers and other agri-business entities to take advantage of existing and changing market opportunities when developing business plans or the proper planning of activities.

Attracting investments in the system of collecting reliable statistical information, processing and disseminating data reflecting the state of the agri-food sector will have a positive impact on the development of the public and private sectors.

## STRATEGIC OBJECTIVES:

The main objective of this priority area is to improve the collection, comparison and dissemination of reliable statistical information.

## KEY STRATEGIC

**ACTIONS:** that are planned to contribute to the achievement of these goals include:

- Adoption of a clear plan for the development of agriculture and food statistics;
- Collection, comparison and publication of information on economic indicators (costs, profit, profit, profitability) of major agricultural products;
- Developing a state program for the development of "smart agriculture";
- Publication of a reference book on farm productivity, state support of industries, labor legislation, taxation, crediting and other necessary information;
- Publication of the annual agriculture report (Agriculture annual report), which includes measures and achievements in the sector and planned state policy measures;
- Active participation in information exchange platforms and international forums for the development of national agricultural systems and services;
- Conducting an Agricultural Census;
- Introduction of a system for identifying, monitoring movement and tracking of farm animals.

## KEY PERFORMANCE INDICATORS AND TARGETS



PHOTO CREDITS:  
FAO UZBEKISTAN

		Baseline (2018)	2021	2025	2030
9.1	Increase in availability and reliability of agri-food statistics data	Incomplete/unreliable	Annual publication of Agri-food statistics based on new collection systems	Annual publication of Agri-food statistics based on new collection systems	Annual publication of Agri-food statistics based on new collection systems
9.2	Increase in availability of market information on prices and trends	Sporadic/incomplete	Weekly publication of market information Monthly and annual market trends review reports	Weekly publication of market information Monthly and annual market trends review reports	Weekly publication of market information Monthly and annual market trends review reports
9.3	Increase in availability of farm productivity data	Sporadic/incomplete	Conduct of targeted farm assessments Publication of gross margin information	Annual publication of farm labor productivity	Annual publication of farm labor productivity

# ROADMAP FOR IMPLEMENTATION



## MEDIUM AND LONG TERM ACTIONS

**1**  Annually  Ministry of Investment and Foreign Trade, Ministry of Agriculture, Ministry of Economy and Industry

**Publication of information catalogs about large domestic producers and processors**

**2**  Annually  State Committee on Statistics, Ministry of Agriculture

**The collection, comparison and publication of information on costs, revenues and comparative profitability of production of the main types of agricultural products.**

**3**  Once in two years  Council of farmers, dekhkan farms and homeowners, Ministry of Agriculture, State Committee on Statistics



**Publication of reference book (handbook) on farming, containing data on production efficiency, state support of sectors, labor legislation, taxation, lending and other necessary information.**

**4**  Annually  Ministry of Agriculture, Ministry of Economy and Industry, Ministry of Investment and Foreign Trade, State Committee on Statistics

**Publication of an annual report on agriculture (Annual Agriculture report), including information on the results achieved in the sector and planned public policies.**

**5**  Permanently  State Committee on Statistics, Ministry of Agriculture

**Active participation in information exchange platforms and international forums for the development of national systems and services in the agri-food sector.**

**6**  Permanently  The Coordination Council

**Organization of meetings, seminars, round tables and press conferences with wide participation of representatives of civil society institutions and the media, as well as international experts as part of the implementation of the Strategy.**

**7**  Q1 2021  State Committee on Statistics, Ministry of Agriculture

**Conducting an agricultural census.**

**8**  Q3 2025  The State Committee for Veterinary and Livestock Development, Ministry of Agriculture

**Implementation of a system for mandatory identification and monitoring of movement and tracking of agricultural animals.**



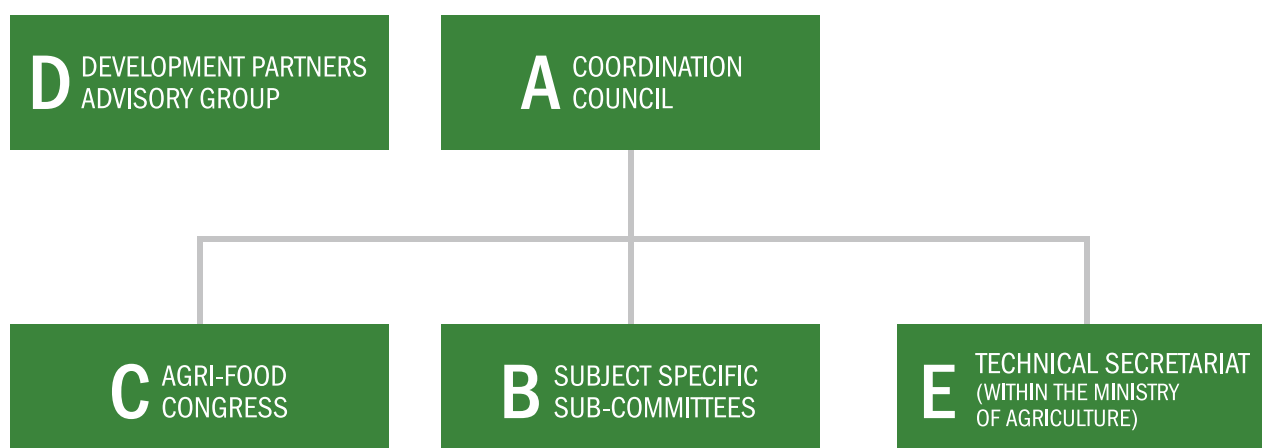
PHOTO CREDITS:  
USAID AGRICULTURAL VALUE CHAINS (AVC) ACTIVITY  
IN UZBEKISTAN

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# STRATEGY IMPLEMENTATION

## GOVERNANCE FRAMEWORK AND COORDINATION MECHANISMS





## A COORDINATION COUNCIL

The Coordination Council will be responsible for overseeing the implementation of the strategy. The executive members of the Coordination Council will include representatives from all of the main executive bodies with a role in the governance of the sector including:

- ◆ The Prime Minister of the Republic of Uzbekistan, who will be the head of the Coordination Council. He will be supported by the Adviser to the Prime Minister on the Development of the Agriculture and Food Sector, and the Minister of Agriculture, who will both be the Co-deputy heads of the Coordination Council;
- ◆ Other Ministers to be included within the Coordination Council will include: Minister for Economy and Industry; Minister for Water Resources; Minister for Investment and Foreign Trade; Minister for Public Health; Minister of Finance
- ◆ State Committee Chairpersons to be included within the Coordination Council will include representatives from: State Committee for Statistics; State Committee for Veterinary and Livestock Development; State Committee for Ecology and Environmental Protection; State Committee for Land Resources, Geodesy, Cartography and State Cadaster; State Committee for Forestry.
- ◆ Inspection Services and Agencies to be included within the Coordination Council will include: Inspectorate for Control of the Agro-Industrial Complex under the Cabinet of Ministers; State Plant Quarantine Inspection Service; Standardization, Metrology and Certification Agency.
- ◆ The CC will be responsible for ensuring the effective coordination of strategic actions (and their funding); provide guidance and support for prioritization and sequencing of implementation; establish and overseeing all relevant Technical Working Groups to be responsible for specific priority actions; coordinate relevant institutional functional assessments, review of findings and recommendations, oversee development of targeted institutional restructuring plans, their approval and implementation; monitor progress and overall performance of the strategy and define mitigating and/or remedial actions to maintain progress. The CC will be supported in the performance of its duties by a permanent technical secretariat to be established within the Ministry of Agriculture.

# GOVERNANCE FRAMEWORK & COORDINATION MECHANISMS

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## B TECHNICAL WORKING GROUPS

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The CC will appoint a number of specific Technical Working Groups which will be responsible for developing strategic plans, programmes and proposed policy options in their areas of technical competence. This is initially anticipated to include Technical Working Groups in the following areas:

- ◆ Public Institutional Reform (in the agri-food sector)
- ◆ Agriculture and rural development
- ◆ Veterinary and Livestock
- ◆ Plant health and protection
- ◆ Food health, safety and nutrition
- ◆ Water resource management and protection
- ◆ Agriculture land resource management and protection

For each Technical Working Group, specific operational mandates will be defined. Membership will be defined based upon the technical needs and requirements of the technical areas and aligned with the priorities defined in the strategy. Detailed work plans will be developed and submitted to the CC for approval. Resources to support the implementation of work plans will be coordinated by the Technical Secretariat.

## C AGRI-FOOD CONGRESS

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To promote wider engagement and support from sector stakeholders from the private sector and civil society, an Agri-food Congress (hereafter 'Congress') will be established, including representatives from the farming and agri-business community, academic institutions and civil society. Relevant development partners will also be invited to participate in the Congress meetings. The main objective of the Congress will be to: increase the active participation and dialogue between the public sector, private sector and civil society in the agri-food sector; promote greater transparency in the development and implementation of relevant sector strategies, policies, programmes and projects; promote the exchange of knowledge and development of thematic networks and public-private partnerships in support of the sector, at all levels.

The Congress will meet annually to review progress and provide feedback on implementation priorities and programs. All proceedings from the Congress annual general meetings will be made public. As an Advisory body, the decisions of the Congress will not be binding upon the government. However, the government will be required to report on actions taken following Congress guidance and recommendations. All Congress members will be provided with regular monitoring reports on strategy implementation progress.



## D DEVELOPMENT PARTNERS ADVISORY GROUP

The Development Partner Advisory Group (DPAG) will include all main development partners that provide assistance in the agri-food sector and have an active interest in participating in regular policy dialogue with the government on the development of the agri-food sector of Uzbekistan. The DPAG will meet on a bi-annual basis, together with senior representatives from the CC to: Review progress with the implementation of the strategy against agreed performance indicators; Provide advice and guidance to overcome bottlenecks and accelerate progress; Consider options for assistance and coordination of support for priority actions; Provide advice on sector reform prioritization and sequencing, based upon international best practices and evidence-based policy analysis and research.

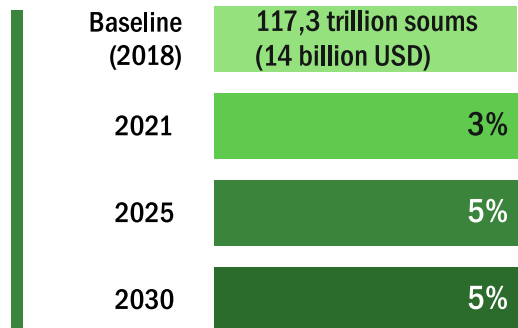
## E TECHNICAL SECRETARIAT

The Technical Secretariat will provide support for the day-to-day management and coordination of strategy implementation. The TC will be established in the Ministry of Agriculture and will include technical experts in program design and management, policy analysis, monitoring and evaluation, communication and public relations. The main function of the TC will be to ensure evidence-based planning and progress monitoring to help guide decision-makers in making adjustments to strategy implementation, based upon practical experience of reform actions in the field.



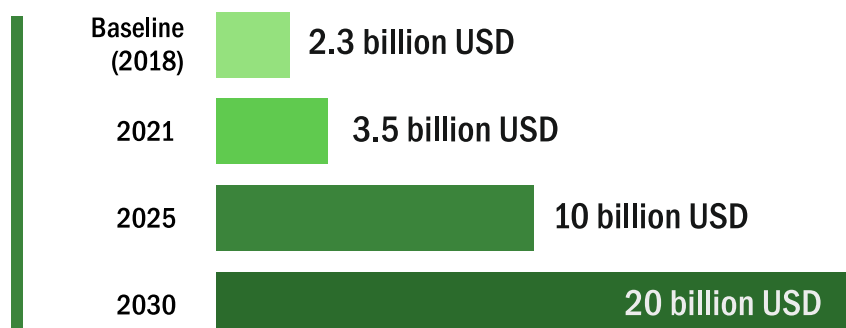
# KEY SECTOR-WIDE PERFORMANCE INDICATORS AND TARGETS

## ANNUAL GROWTH IN AGRICULTURAL VALUE ADDED



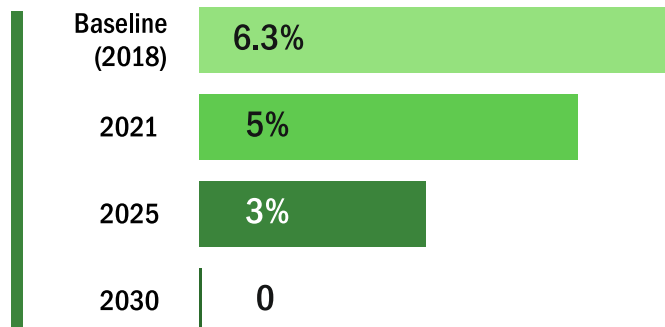
	Baseline (2018)	2021	2025	2030
GROWTH IN THE NUMBER OF AGRI-FOOD JOBS:				
AGRICULTURE	3 671 300	2 %	1 %	1 %
FOOD INDUSTRY	91 420	3 %	4 %	5 %
TEXTILE INDUSTRY	140 200	3 %	4 %	3 %

## GROWTH IN THE VALUE OF AGRI-FOOD EXPORTS





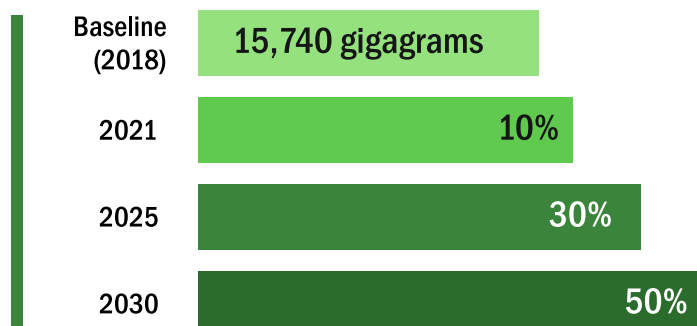
## THE PROPORTION OF UNDERNOURISHED POPULATION



## AGRICULTURE LABOR PRODUCTIVITY (USD PER AGRICULTURAL WORKER PER ANNUM)











## REDUCTION IN GREENHOUSE GAS EMISSIONS FROM AGRICULTURE SOURCES



# ANNEX 1:

## INDICATIVE STATE BUDGET FRAMEWORK AND PLANNED CHANGES (2020-2030)

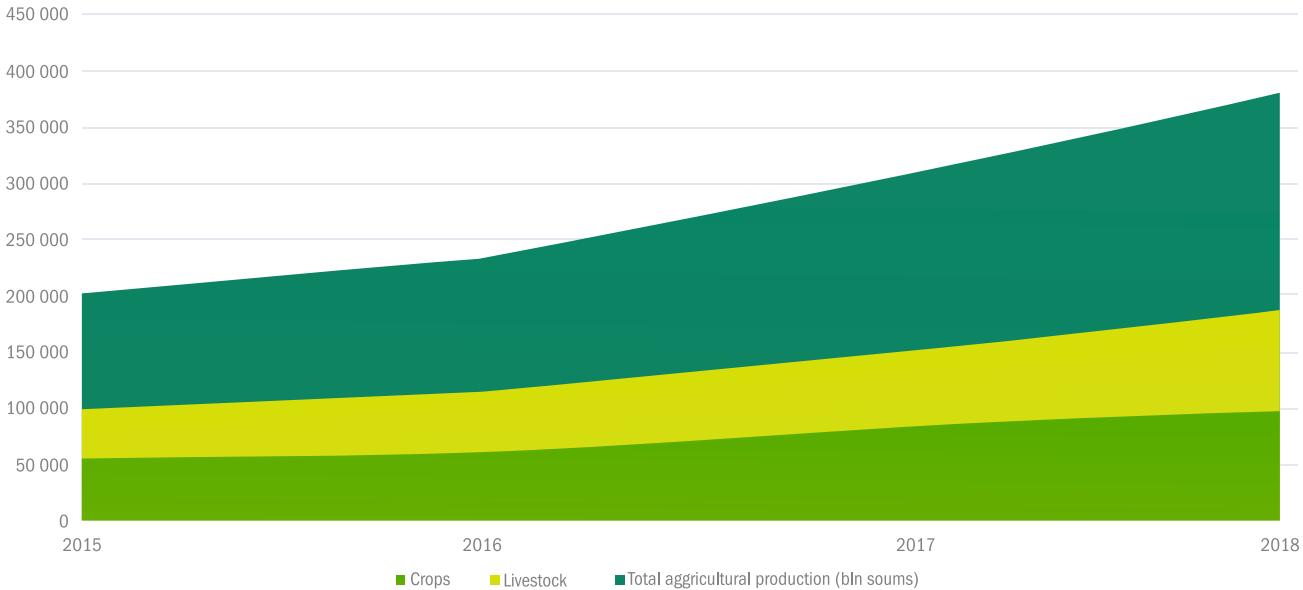
SPENDING PRIORITIES	AS A PERCENTAGE OF THE TOTAL AMOUNT ALLOCATED TO THE AGRICULTURE SECTOR IN 2018	TARGET DIRECTIONS FOR THE DIVERSIFICATION OF BUDGET SPENDING	SPENDING PRIORITIES	AS A PERCENTAGE OF THE TOTAL AMOUNT ALLOCATED TO THE AGRICULTURE SECTOR IN 2018	TARGET DIRECTIONS FOR THE DIVERSIFICATION OF BUDGET SPENDING
 Intervention reserve ensure food security	0%	*	 Support for agricultural production in vulnerable areas / low fertility land	1.4%	^
 Interest rate subsidies for raw cotton producers	9.2%	v	Good agricultural and environment practices	0%	*
Interest rate subsidies of grain (cereal) producers	1.9%	v	Forestry management and protection program	1%	^
Seed production and quality control program	0.1%	^	Capital costs for irrigation systems	10.5%	^
Livestock development program	0.1%	^	Capital investments for the restoration of irrigation systems	7.8%	^
Fisheries development program	0.1%	^	Irrigation systems management and operation	17.5%	^
Agriculture mechanization program	5.4%	v	Energy costs for irrigation	23%	v
Horticulture development program	0%	^	 Inspection services (agriculture, veterinary, phyto-sanitary control, food safety)	0.2%	^
Agri-logistics services development program	0%	*	Plant protection service	0.3%	^
Development of agricultural cooperatives and farmer groups	0%	*	Veterinary service & animal health protection	3.9%	^
 Agriculture modernization and diversification program	0%	*	Food safety service	0%	*
Public-private partnership development program	0%	*	Disaster risk management	1%	^
 Rural areas development program	0%	*	 Agricultural research and development	0.5%	^
			Agricultural education	5.9%	^
			Agricultural extension and advisory services	0%	*
			 Agri-food information and statistics system	0%	*
			Other expenses	10.2%	v

v Phased reduction  
 ^ Incremental increase  
 \* New spending priority



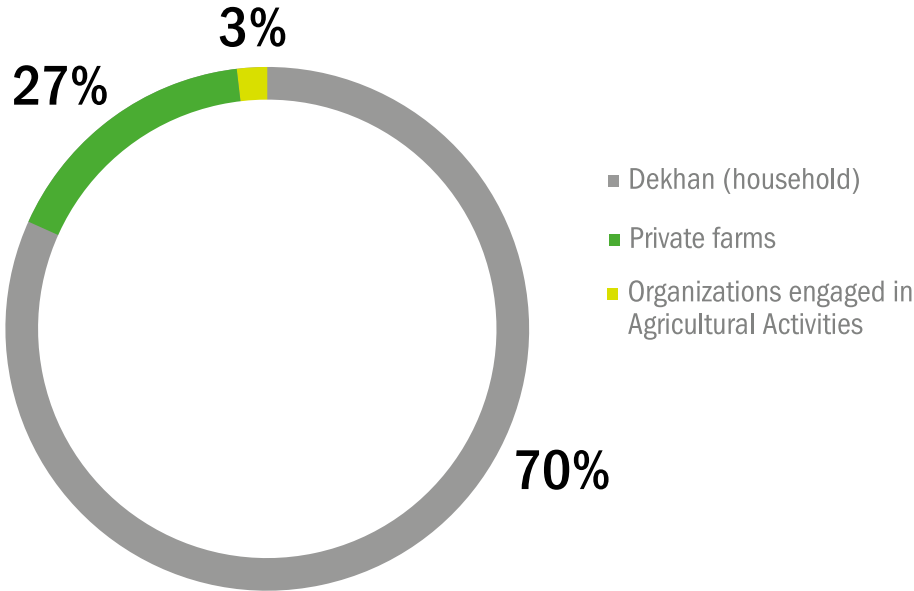
# ANNEX 2: UZBEK AGRI-FOOD SECTOR IN NUMBERS

## AGRICULTURAL PRODUCTION (IN BLN SOUMS)



Source: State Committee of the Republic of Uzbekistan in Statistics

## AGRICULTURAL PRODUCTION BY FARM CATEGORY IN 2018



Source: State Committee of the Republic of Uzbekistan in Statistics

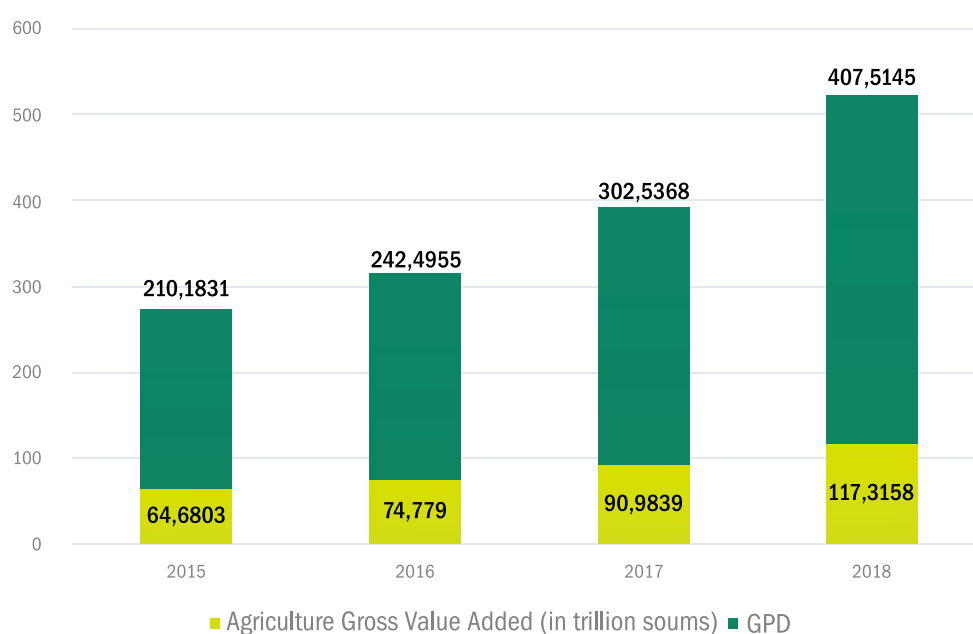


## NUMBER OF EMPLOYED PERSONS IN AGRICULTURE



Source: State Committee of the Republic of Uzbekistan in Statistics

## UZBEKISTAN'S GDP AND AGRICULTURE GROSS VALUE ADDED (IN TRILLION SOUMS)



Source: State Committee of the Republic of Uzbekistan in Statistics

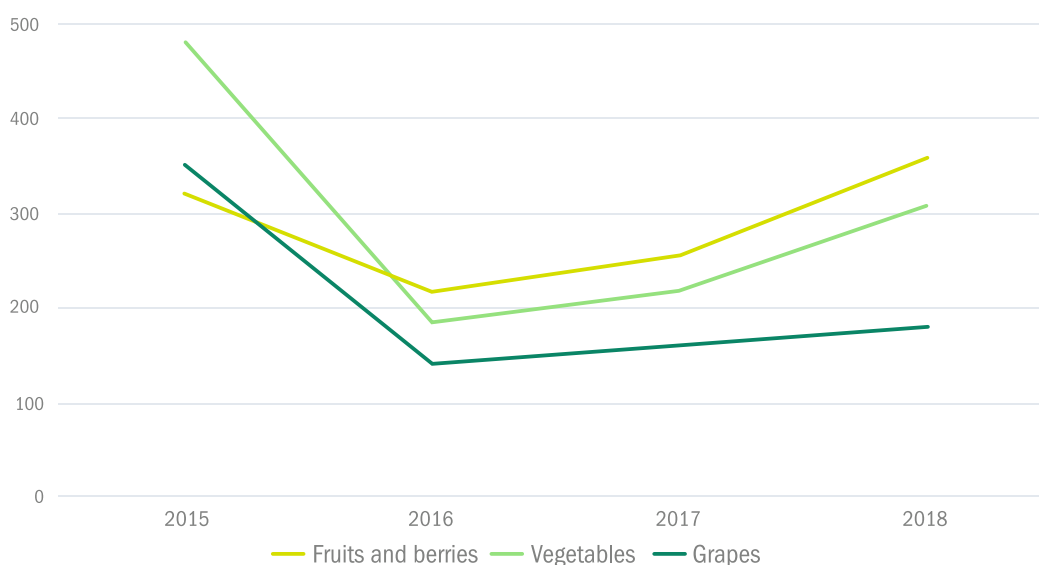
# ANNEX 2: UZBEK AGRI-FOOD SECTOR IN NUMBERS

## SOURCES OF INVESTMENT IN AGRICULTURE



Source: State Committee of the Republic of Uzbekistan in Statistics

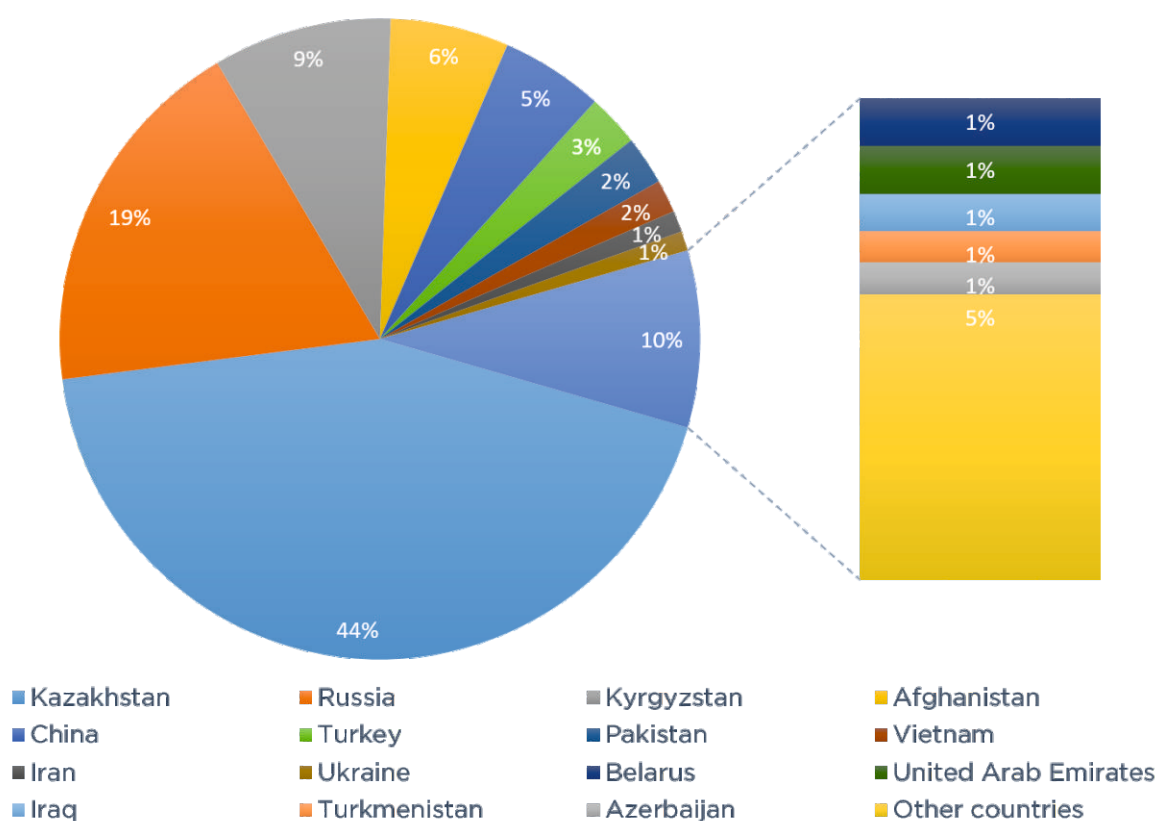
## EXPORT OF AGRICULTURE GOODS 2015-2018 (IN MLN USD)



Source: State Committee of the Republic of Uzbekistan in Statistics



## EXPORT DESTINATIONS SHARE IN TOTAL EXPORT



Source: State Committee of the Republic of Uzbekistan in Statistics

# ANNEX 3: UZBEK AGRI-FOOD SECTOR CONTACTS

MINISTRIES	
Ministry of Agriculture	2 Universitetskaya street, Qibray district, Tashkent region Tel: +998 712604873
Ministry of Economy and Industry	45A Islom Karimov street, Tashkent Tel: +998 712326320
Ministry of Finance	29 Istiqlol Str, Tashkent Tel: +998 712391252
Ministry of Investments & Foreign Trade	1 Islom Karimov street, Tashkent Tel: +998 712385000
Ministry of Water Resources	39A Kori Niyozı street, Tashkent Tel: +998 712370926
STATE COMMITTEES	
State Committee for Ecology & Environmental Protection	2A To'y-tepa street, Tashkent Tel: +998 712070770
State Committee for Forestry	8- 21 Qatortol Street, Tashkent Tel: +998 71 2733768
State Committee for Land Resources, Geodesy, Cartography & State Cadaster	Chilanzar-C, Choponota Str, Tashkent Tel: +99871 2738401
State Committee for Veterinary & Livestock Development	21A Kichik Khalka Yuli street, Tashkent Tel: +998 712021200
STATE AGENCIES AND INSPECTION SERVICES	
Agency for Implementation of Projects in the Field of Agroindustry and Food Security «UZAIFFSA»	1A Labzak Str, Tashkent Tel: +998 712414922; +998 712371658
Agency of Horticulture and Greenhouse Development under the Ministry of Agriculture	6 Abay street, Tashkent Tel: +99871 2444625
Agency of Viticulture and Wine Development under the Ministry of agriculture of the Republic of Uzbekistan	6 Abay street, Tashkent Tel: +998 71 2440339
Crop Variety Testing Centre	374 Buyuk Ipak Yuli street, Tashkent Tel: +998 712614326
JSC "Uzagrokimohimoya"	77 Nukus street, Tashkent Tel: +998 712810980
JSC «Uzdonmahsulot»	36 Shaxrisabz street, Tashkent Tel: +998 712336964



JSC «Uzpahtasanoat»	8 Shota Rustaveli street, Tashkent Tel: +998 712020400
Research and Production Centre for Agriculture and Food Supply under the Ministry of Agriculture	2 Universitetskaya street, Qibray district, Tashkent region Tel: +998 712605183
State Plant Quarantine Inspection under the Cabinet of Ministers	17 Bobur street, Tashkent Tel: +998 712556239
Centre for Development of Seed Production	70 Namangan street, Tashkent Tel: +998 712621395
Centre for Standardization of Agriculture under the Ministry of Agriculture of the Republic of Uzbekistan	2 Universitetskaya street, Qibray district, Tashkent region Tel: +998 712631107
“Uzstandard” agency	333A Farobi Street, Tashkent Tel: +998712020011
<b>ACADEMIC ORGANIZATIONS</b>	
Samarkand Institute of Veterinary Medicine	77 Mirzo Ulugbek street, Samarkand Tel: +998 662340786
Scientific Production center of Agriculture and Food Supply	2 Universitetskaya street, Qibray district, Tashkent region Tel: +998 712605108
Tashkent Institute of Irrigation and Agricultural Mechanization Engineers	39 Kari Niyazov street, Tashkent Tel: +998 712374668
Tashkent State Agrarian University	2 Universitetskaya street, Qibray district, Tashkent region Tel: +998 712637600
Uzbekistan Academy of Sciences	70 Yahyo Gulyamov street, Tashkent Tel: +998 712336847
<b>ASSOCIATIONS / CIVIL SOCIETY ORGANIZATIONS</b>	
“Parandasanoat” Association	36 Shakhrisabz street, Tashkent Tel: +998 712321022
Agri-business Association	25-52 Amir Temur street, Tashkent Tel: +998 997987255
Association of Beekeepers of Uzbekistan	40 Navoi street, Tashkent Tel: +998 712321061
Association of potato producers	50 Promzona street, Tashkent Tel: +998 712588605

Association of producers and exporters of lemon	2 Universitetskaya street, Qibray district, Tashkent region Tel: +998 901117505
Association of Seed Producing Organisations	Namanganskaya street 70, Tashkent Tel: +998 977817070; +998 983079939
Association of Walnut producers and exporters	14 Katta Uzbektract street, Tashkent Tel: +998 915517767
Council of Farmers, Dehkan Farms and Household Landowners	2A Islam Karimov avenue, Tashkent Tel: +998 712330714
Republican Association of Livestock Breeding	36 Shakhrisabz street, Tashkent Tel: +998 712321022
Uzbek Association of fish industry	2 Universitetskaya street, Qibray district, Tashkent region Tel: +998 781487070
INTERNATIONAL ORGANIZATIONS	
Agence Française de Développement (AFD)	25 Istiqbol street, Tashkent Tel: +998 712336669
Asian Development Bank (ADB)	1 Qoratosh street, Tashkent Tel: +998 781401920
Delegation of the European Union (EU) in Uzbekistan	15th Floor, International Business Center, 107B, Amir Temur street, Tashkent Tel: +998 71201601/02/03/04
Deutsche Gesellschaft for Internationale Zusammenarbeit (GIZ)	7a Chimkentskaya Street, Mirabad District, Tashkent, Tel: +998 712806751
Food & Agriculture Organization (FAO) of the United Nations in Uzbekistan	2 Universitetskaya street, Qibray district, Tashkent region Tel: +998 712604441
Islamic Development Bank (IDB)	107B Amir Temur street, Tashkent Tel: +998 781203077
Japan International Cooperation Agency (JICA)	5th Floor, International Business Center, 107B, Amir Temur street, Tashkent Tel: +998 781207966
Korean International Cooperation Agency (KOICA)	32 Fidokor street, Tashkent Tel: +998 712523561
Turkish Cooperation and Coordination Agency (TIKA)	52 Vosit Vokhidov street, Tashkent Tel: +998 712525457
United Nations Development Programme (UNDP)	4 Taras Shevchenko street, Tashkent Tel: +998 781203450
United States Agency for International Development (USAID)	3 Moyorqorghon street, Tashkent Tel: +998 711206309
World Bank (WB)	15th Floor, International Business Center, 107B, Amir Temur street, Tashkent Tel: +998 711202400

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MINISTRY OF AGRICULTURE  
OF THE REPUBLIC OF UZBEKISTAN

## STRATEGY FOR THE DEVELOPMENT OF AGRICULTURE OF THE REPUBLIC OF UZBEKISTAN FOR 2020-2030

The Strategy for the Development of Agriculture of the Republic of Uzbekistan for 2020-2030 was prepared by the Ministry of Agriculture of the Republic of Uzbekistan in collaboration with other relevant Government Ministries and Agencies and a wide range of international development partners.

This Publication 'Transformation 2030' provides a summary of the officially approved Agriculture Strategy of the Republic of Uzbekistan for 2020-2030, prepared in Uzbek, Russian and English language versions. The Publication was prepared by the Ministry of Agriculture, with the financial and technical support of the European Union.



It should be noted that any policies, views or opinions expressed in this publication are those of the Ministry of Agriculture of the Republic of Uzbekistan and do not necessarily represent any official views of the European Union.

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