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Agricultural Development in Tajikistan

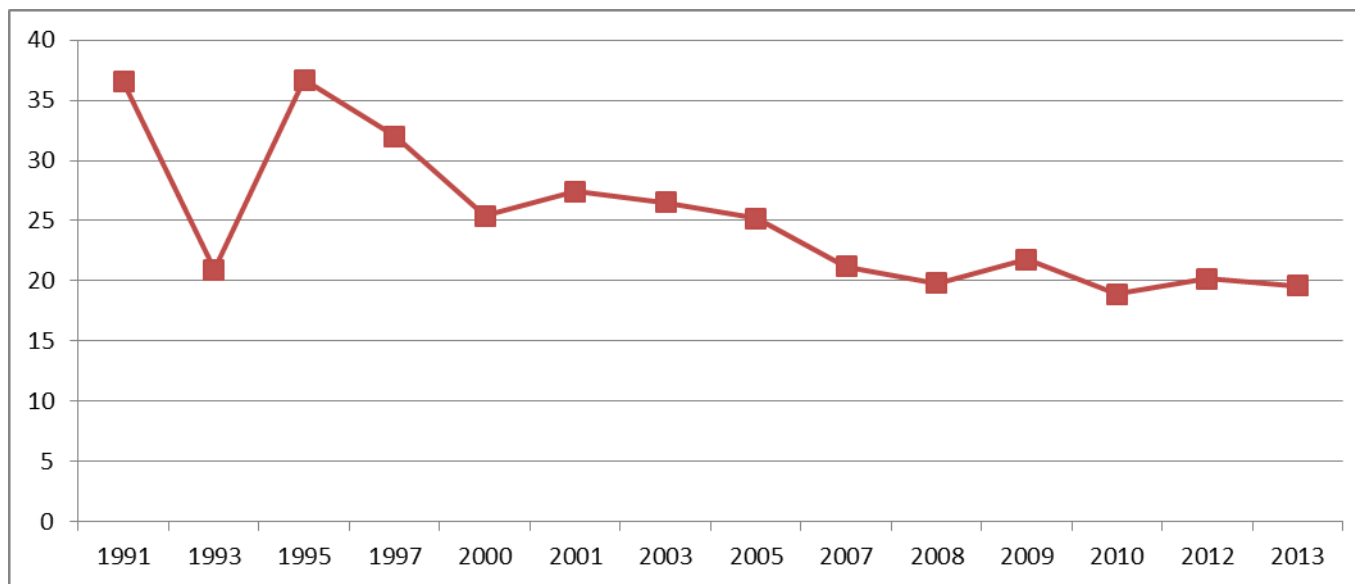
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Role of agriculture

- ▶ After independence, the share of agriculture in the structure of GDP decreased (from 36.5% in 1991 to 19.6% in 2013)
- ▶ The crisis in the agriculture still continues.

Agriculture in GDP, %

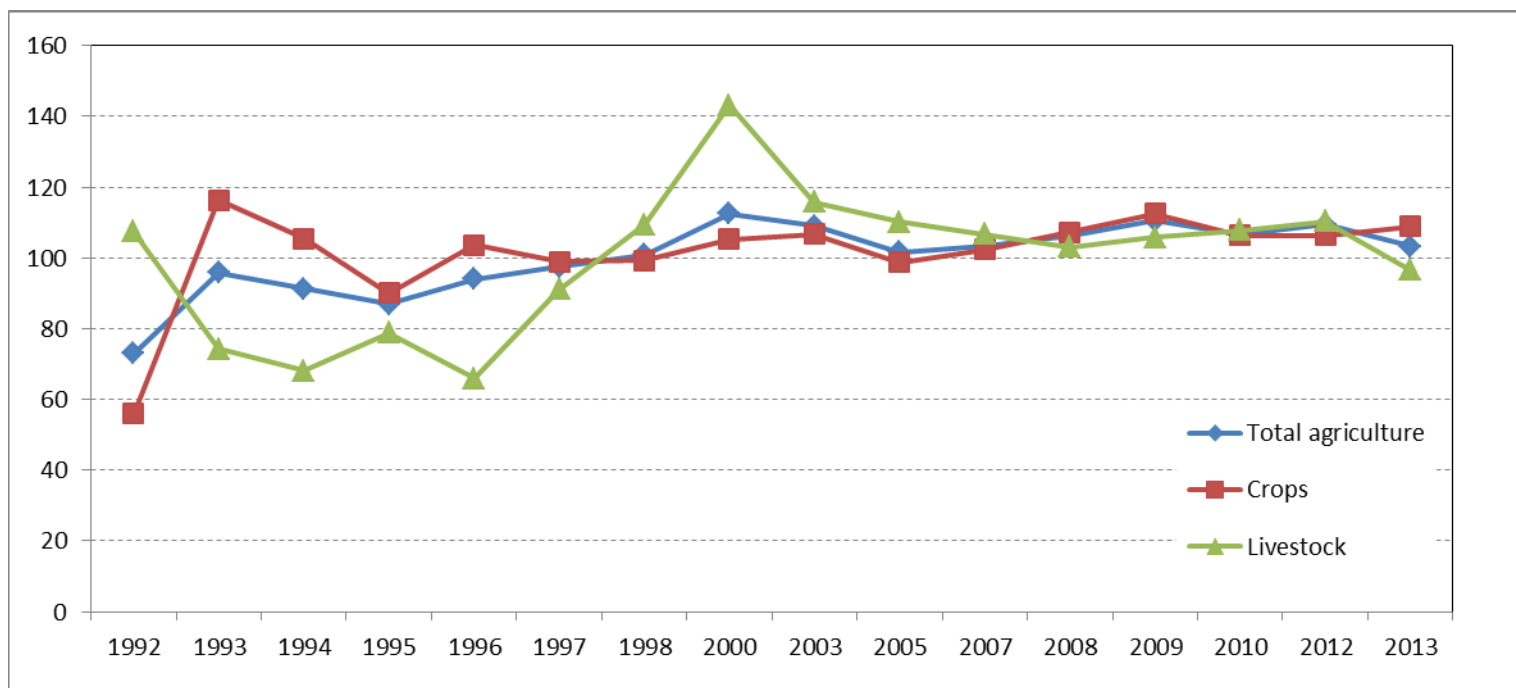


Source: State statistical committee of the Republic of Tajikistan

GVA growth rates in 1991-2013

- ▶ Average annual agricultural GVA growth rates in 1991-2013 = 7.1 %

GVA growth rates



Source: State statistical committee of the Republic of Tajikistan

Per capita production of agri products

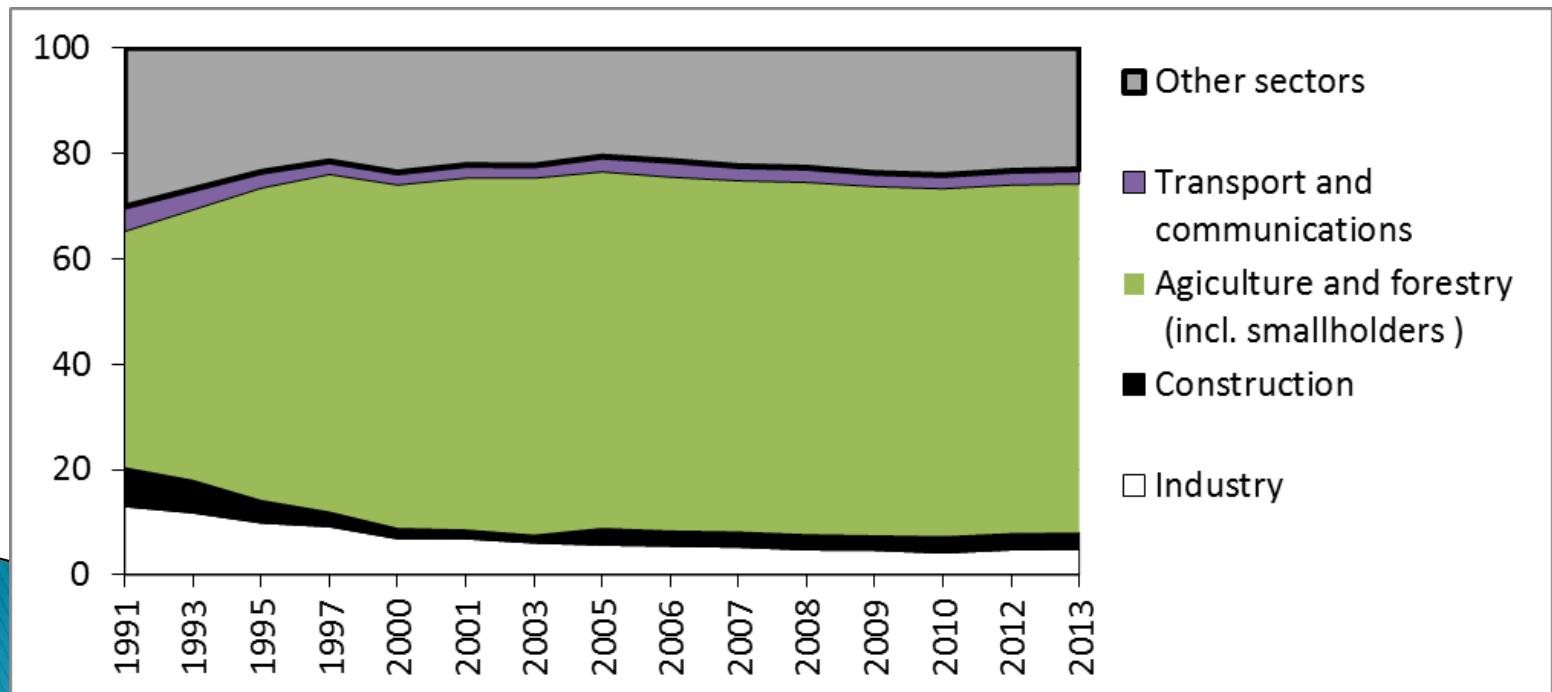
- ▶ Increase is observed in cereals (mostly wheat, potato, vegetables, melons)
- ▶ Decline mainly in livestock products and grapes

	1991	1995	2000	2005	2010	2013
Cereals	54.3	42.2	89.8	133.8	167.5	170.3
Potato	32.3	18.9	49.5	80.2	100.9	97.6
Vegetables	112.1	83.3	57.9	103.8	151.7	149.4
Melons	31.2	19.7	15.6	24.6	69.1	71.3
Fruits and berries	31.6	25.2	27.7	21.4	29.9	33.3
Grapes	21.6	16.3	18	13.1	16.5	14.3
Meat (slaughter weight)	13.4	8.7	4.8	7.8	9.5	12.3
Milk	104.9	64.7	50.6	77.2	87.8	91.1
Eggs, pcs	81.1	8.4	3.8	14.3	20.8	33.2

Source: State statistical committee of the Republic of Tajikistan

Sectoral employment

- ▶ Agrarian overpopulation
- ▶ Declining share of employment in agriculture
- ▶ Tendency of de-urbanization
- ▶ Share of non-agricultural sectors reduced
 - Leads to a deterioration of living standards
 - Contributes to the massive migration of the rural population

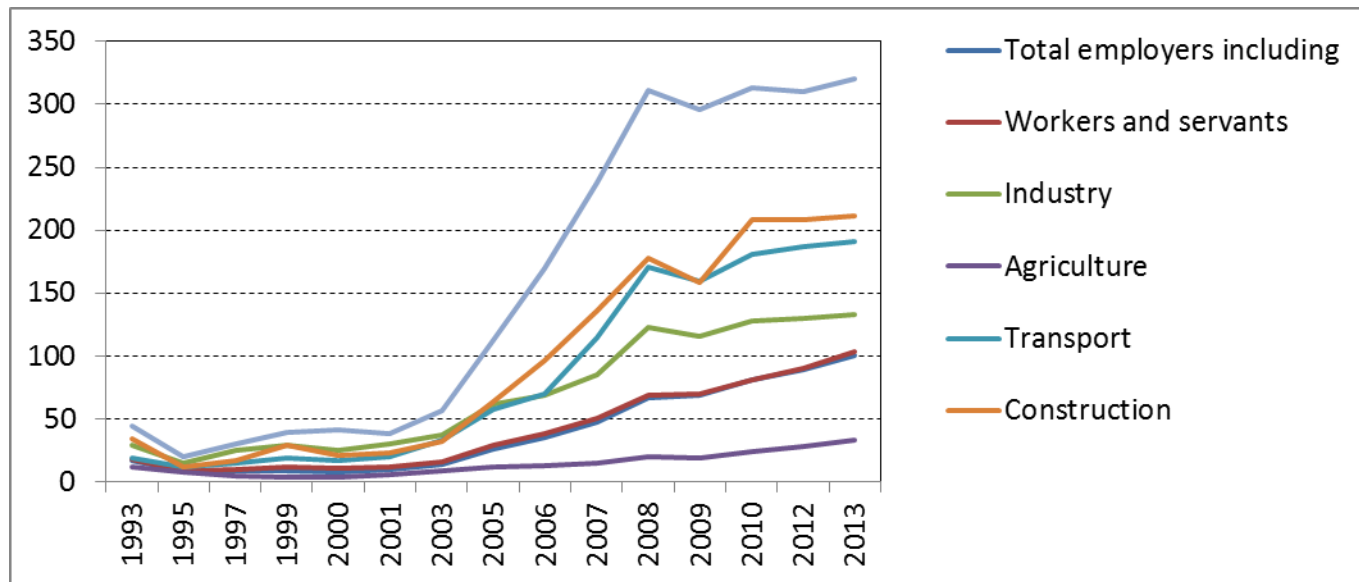


Source: State statistical committee of the Republic of Tajikistan

Average monthly salary in sectors

- ▶ 1992-2013: Agricultural salary has increased almost threefold
 - Purchasing power of the dollar has dropped by 3 times
- ▶ Agricultural salary 2.8 times lower than average national salary

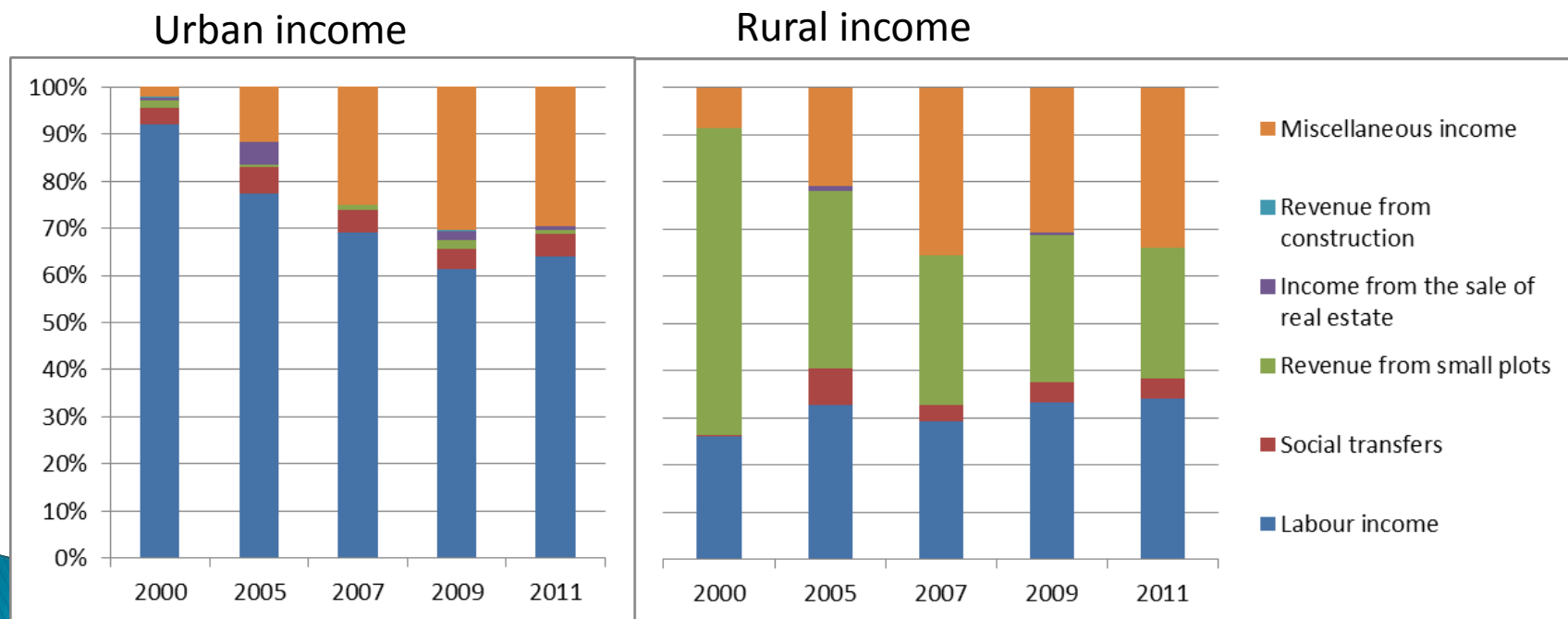
Average monthly salary (in USD)



Source: State statistical committee of the Republic of Tajikistan

Structure of gross household income (%)

- ▶ Revenue from the village organized employment are on average 2.3 times less than urban households
- ▶ Trends of other incomes of urban and rural households tend to converge



Source: State statistical committee of the Republic of Tajikistan

Indicators and conditions of meliorative system in Tajikistan

Indicators	Present levels	Normative requirements
Index of land use	0.68-0.70	> 0.8
Efficiency of irrigation systems	0.72-0.62	> 0.8
Area inhabited land (%)	18	0
Groundwater depth, m.	0.5-3.0	Below 5
The area of land with groundwater levels from 0.5 to 3.0 (%)	25.6	Less 3
Groundwater salinity, g/l	1-3 and more	Less 1.0
The area of land with level of mineralization from 1.0-3.0 g/l (%)	49.6	100
Delivery of water during the vegetation period (%)	10.0-75.0	10.0-75.0
The number of water meters on 100 ha land (pce).	3	5.0-7.0
The level of automation and mechanization of irrigation and dispatching services (%)	10	83-100

Source: Ministry of Agriculture of the Republic of Tajikistan,

Indicators and conditions of meliorative systems in Tajikistan

- ▶ Large differences between real and normative conditions of meliorative system
- ▶ Threat of a gradual reduction of the area under irrigated lands
- ▶ Need for complete reconstruction of collector and drainage systems
- ▶ Necessity to end the wasteful irrigation regimes, non-compliance to irrigation norms, the deterioration of the quality of irrigation water

Indicators and conditions of meliorative systems in Tajikistan

- ▶ The reasons for the above mentioned situation:
 - Termination of the state support for meliorative system
 - Serious technical mistakes made during the construction of irrigation systems
 - Expansion of the processes of erosion in the irrigated areas
 - Desertification of irrigated and non-irrigated land

Possible solutions

- ▶ Multiple expansion of works on rehabilitation of existing irrigation and drainage systems
- ▶ Transition to the use of innovative technologies and ideas
- ▶ Widespread use of water-, energy- and land-saving technologies
- ▶ Involvement of direct foreign investments for transition to modern irrigation methods, particularly to drip irrigation