



## DEVELOPMENT EMERGENCY MODALITY

### Joint Programme 2022 Annual Progress Report

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#### Cover Page

**UNCT/MCO:** Turkey

**Reporting Period:** 1 January - 31 December 2022

**JP title:** Supply Chain Analysis For The Turkish Wheat Sector – Building A Resilient Food System

**Thematic SDG Areas:** Food systems transformation; Climate action & energy transformation;

**PUNOS:** FAO, WFP

**Stakeholder partner:** National Government; Sub-national Governments; Civil Society Organizations; Humanitarian actors; Disaster Risk Management actors; Private sector;

**Gender Marker:** Gender-sensitive (for example, the JP acknowledged and aimed to address gender to enhance the policy/programme, such as undertaking gender analysis to ensure policies/programmes do no harm)

**Resident Coordinator Name:** Rodriguez, Alvaro

**Resident Coordinator Email:** alvaro.rodriguez@un.org

#### Annual Progress

##### Overall JP self-assessment of 2022 progress:

On-track (expected annual results-achieved)

##### Overall Progress

The UNJP activities have commenced by establishing a national team of consultants/experts as well as recruiting an international consultant. Surveys have been conducted in 8 representative provinces with the key informants, input suppliers, farmers, producers and producer unions as well as processing industry representatives to collect primary data on the impact of domestic market volatilities, the Ukraine war, covid-19 pandemic and climate change on behaviour of the producers and other key stakeholders.

Currently, analysis of secondary data on import and export is ongoing. This analysis also incorporates the extensive processing and value added sector in Türkiye.

For further multi stakeholder consultations, two workshops will be held in Gaziantep province on 31 January 2023 and Tekirdağ province on 2 February 2023 with the participation of stakeholder representatives. This will allow the sharing and evaluation of preliminary outcomes of the field data, survey findings, and consultations with the farmer organizations, commercial sector and government agencies. These workshops will be followed by a validation workshop in Ankara and finalization of the report.

So far, it is estimated that 60 % of the activities that were scheduled to produce the targeted outputs have been accomplished. All outputs are planned to be achieved by the end of March 2023.

A communication plan was prepared during this reporting period, and a press release has been published.

## **SDG Acceleration progress towards the SDGs, focusing on the main SDG targets**

- The UNJP is directly related with the SDG-1 and SDG-2, contributing also to SDGs 5, 13 and 15.
- Many countries, food-insecure or not, import processed wheat products from Türkiye. So, developments in value chains would directly affect this supply to other countries.
- There is also connection between international supply routes. In this sense, Türkiye is also crossing point for wheat exports from Ukraine and Russia for trade or humanitarian aid purposes. Wheat exports from Russia and Ukraine to other countries are severely impacted by the conflict in Ukraine. This caused increased vulnerability against shocks and volatility, and severe food insecurity. The UNJP is planned to further analyse the bridging role of Türkiye, as evidently experienced during the establishment of the UN lead Black Sea Grain Initiative to enable wheat exports from Ukraine amid the ongoing war.
- The dynamics of the changes in the prices of wheat products for both Turkish and international consumers will lead to discussions for better and more pre-emptive policies in the trade of wheat and its products. These policies will also give an inspiration to UN agencies and the international community in financing the procurement of wheat products as humanitarian aid to the vulnerable countries, especially to WFP.
- The UNJP outcomes and recommendations will also provide policy advice and projections for the international community and financing agencies on ensuring a more sustainable and secure wheat production and trade in the surrounding region and beyond.

## **Constraints that were encountered and any adjustments that were made to strengthen the relevance and effectiveness of the JP and the coherence and coordination of UN system support.**

FAO, IFAD and WFP in coordination with the RCO worked efficiently on the preparation and implementation of the project. The main challenge experienced was the short duration of the project cycle, considering the extensive number of stakeholders and complex nature of the supply chain. Even if the governmental approval process was not mandatory during the call period, an effort was made to obtain this confirmation to ensure ownership and sustainability of the project and its outcomes by the public authorities. However, this process took longer than expected and delayed the commencement of the project's activities. Nevertheless, following the approval, the progress has been accelerated, and currently planned activities are taking place with no major constraints. The project team is confident that the work can be completed as indicated in the time frame.

Recruitment of an international professional with extensive wheat sector experience and knowledge of the region, processing and value chain concepts proved difficult and delayed the start of analysis. However, an extensive search helped identification of a knowledgeable well experienced consultant with over 45 years of experience in the wheat milling industry, including deregulation and fortification aspects. Though joined the team slightly late his contribution is greatly helping to advancement of the analysis of the findings and development of the policy recommendations.

## **Next steps, scaling and sustainability [up to half a page]**

The analysis of the wheat supply chain is considered crucial to identify the challenges in Turkey's national market and in international markets interacting with Turkey. Create a picture of the current capabilities, procedures, and strengths of the supply chain while also locating the variables that might potentially boost the chain's resilience or possible places of help throughout the chain.

Inputs from all stakeholders including those from the government agencies are contributing to identification of problems and formulation of policy recommendations. It is believed that engagement of the key players during consultations and keeping the seven government focal points informed of the progress will ensure sustainability of the project. The UNJP is in line with the National Food Systems Transformation Pathway of Türkiye, which has also been prepared by the Ministry of Agriculture and Forestry with technical support of the respective UN Entities, including the PUNOs of the present NJP. The results of the UNJP is also envisaged to inform the 12th National Development Plan of the Government, preparation process of which is also ongoing.

Various bilateral workshops will be organized to analyse and assess the practical findings of the UNJP, which include field data, survey results, and private sector requests, in order to build a road map for the Turkish wheat industry. By enacting policies as a result of UNJP, the Turkish wheat industry may be anticipated to be better prepared for crises, more sustainable in production, and more valued in the global wheat market.

Preliminary suggestions indicate that among the policy recommendations, there would be a reference to a need for an effort for stronger collaboration among the national stakeholders for wheat sector development.

## Strategic Partnerships and Communications

### Explain how diverse stakeholders were engaged with the JP

This assessment has been carried out hand in hand with the Ministry of Agriculture and Forestry with extensive consultation with private sector representatives of the Turkish wheat sector, producers and the NGOs. This was done through joint primary data collection surveys as well as face to face meetings and focus group discussions. Workshops are planned to present preliminary findings and further discussions and validation. While inputs from farmers were collected through surveys and consultations with the private sector members were held through face-to-face meetings and focus group discussions, dialogue with the relevant government institutions and several departments from Ministry Agriculture and Forestry was ensured through bilateral meetings, and workshops.

#### Key meetings and events organized

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JP steering committee/ programme board meeting	Strategic partners/ donors	Kick-off meeting event
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## Priority Cross-cutting Issues

### Cross-cutting results/issues

Almost 1/3 of the arable land in Türkiye is cultivated for wheat production. According to the Turkish Statistical Institute, women account for 40% of Türkiye's average 5 million farmers which means a significant part of the wheat farmers are women. Women are also employed in the industries that emerge throughout the process of using wheat as a raw material to create products, in addition to their direct involvement in farming practices. With the help of incentives to build their own economies, women operate many small and medium-size businesses that specialize in processing and marketing, some through cooperatives. While wheat gives women the opportunity to start their own enterprises for local scale, the food value chain is expanding continuously and there is great scope for them to transform into small businesses on bakery products especially.

### How did the JP apply the Gender Marker

The JP is Gender-sensitive (for example, the JP acknowledged and aimed to address gender to enhance the policy/programme, such as undertaking gender analysis to ensure policies/programmes do no harm). Policy dialogues, advocacy (e.g. direct inputs to national policies, strategies, laws, including women's and girls' rights groups in coordination mechanisms);

### JP address the below cross-cutting issues and principles of leaving no one behind

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Human Rights	Persons with disabilities	Youth	Environmental and social standards
Yes	No	No	Yes

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## Contribution to enhancing SDG Financing

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Drafted a bill, strategy, and/or approved a law increasing the fiscal	Produced financing, costing, diagnostic and feasibility analyses as a basis to invest or	Improved efficiency (cost savings) in the management of programmes/schemes	Improved effectiveness (value for money; i.e.	Drafted policies/regulatory frameworks or developed tools to	Structured new financial instruments (public, private or
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space for the policy in focus	increase spending on the SDGs		social impact of \$1 spent) of spending	incentivize private sector investment on the SDGs	blended) to leverage additional funding
No	No	No	No	No	No

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**How and in which area your JP contributed to enhancing SDG financing**

N/A