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Report Name: Turkiye Sets its Agricultural Priorities for the Next 5-Years

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Report Highlights:

In April 2025, the 4th Agriculture and Forestry Council (AFC) developed a framework that is intended to guide the future of the Turkish agricultural sector for the next five years. The AFC's proposed framework is aimed at strengthening food security, increasing exports, modernization, and enhancing climate change resilience.

Türkiye Sets its Agricultural Priorities for the Next 5-Years

In April 2025, the Turkish Ministry of Agriculture and Forestry (MinAF) convened the 4th conference of the Agricultural & Forestry Council (AFC), which was dubbed “Türkiye’s Century – the Century of Abundance.” Drawing on input from more than a dozen working groups comprised of public and private stakeholders, the AFC formulated and issued 86 strategic decisions that are intended to serve as a blueprint in guiding the direction of the Turkish agricultural sector for the next five years. The AFC is comparable to USDA’s Agricultural Outlook Forum, but with a stronger policy-planning focus. The AFC was previously held in 1997, 2004, and 2019.

At the public unveiling of the outcome of the AFC in May, President Erdogan heralded the 86 decisions as a forward-looking step towards transforming the Turkish agricultural economy into a more globally competitive, climate resilient, and modernized sector. He stressed that the realization of these decisions was crucial to bolstering national security and food security, while touting the earlier launch of an “innovative production planning system” that incentivizes farmers to grow certain crops to conserve water resources. (Refer to [GAIN: TU2025-0012](#) for details about this new production planning model.)



The theme logo of the 4th AFC Conference - “Türkiye’s Century - The Century of Abundance”

Future Priorities Focused on Food Security, Exports, and Climate Resilience

At the AFC, which was chaired by the MinAF Minister, public and private participants from a wide spectrum of the Turkish agricultural sector reviewed and condensed more than a thousand recommendations from 16 working groups into 86 decisions. Refer to the annex 1 for a full list of decisions and annex 2 for the list of working groups. The working groups were convened earlier in the year to develop recommendations for the AFC’s consideration.

The implementation of these 86 decisions is intended to make the Turkish agricultural sector more self-sufficient, modern, climate-resilient, and better equipped to withstand global crises while contributing to global food security. MinAF is expected to use these decisions in developing its future regulations, policies, programs, budgets, and other priorities. However, the actualization of all these decisions, which are not legally-binding, is not necessarily guaranteed given competing priorities and limited resources.

The decisions from the AFC can be distilled into the following five interrelated thematic areas.

1. *Strengthen Food Security*: Optimize land and water resources; increase the production of strategic, climate resilient crops and livestock products; employ sustainable agricultural practices (e.g. no till, reduce food waste); expand the use of innovative technology (e.g. AI-enhanced crop production models); and streamline the farm-to-fork supply chain. Reduce over-dependence on imported agricultural inputs.
2. *Boost Agricultural Exports*: Increase exports of value-added products through improved brand recognition and other actions.
3. *Improve the Usage of Land, Water, and Forests*: Consolidate land holdings; reduce water usage by transitioning to modern, pressurized irrigation systems; and make forests more sustainable and resilient to fire threats.
4. *Enhance Climate Change Resilience*: Align regulations and policies with the EU Green Deal; expand the use of renewable energy sources; reduce water consumption; develop and deploy climate-resistant crop varieties, and institute early warning systems for droughts and floods.
5. *Invest in Technology and R&D*: Establish Agriculture-Oriented Technology Development Zones and R&D Centers to spur innovation; invest in developing climate resistant crop varieties; and develop and deploy AI-enhanced production forecasting models and early warning systems.

4th AFC Decisions Shaped by Global and National Crises

The 4th AFC decisions were shaped by earlier global crises, including the supply chain disruptions resulting from the covid pandemic, the war in Ukraine, as well as the impact of climate change and record food inflation in Türkiye. The 4th AFC's decisions exhibited an increased focus on crisis readiness and self-sufficiency, compared to the earlier AFC in 2019.

The 3rd and 4th AFCs both shared a strategic focus on strengthening Türkiye's agricultural sector but differed in emphasis and scope. While the 3rd AFC (2019) was a forward-looking policy framework focused on long-term structural reforms, the 4th AFC (2025) shifted toward a more urgent, resilience-based model, responding to the compounding pressures of climate change, input cost inflation, geopolitical instability, and water scarcity.

The 3rd AFC with its 60 decisions prioritized foundational reforms such as digitalization, efficient land use, rural development, increased R&D and mechanization, and sustainability. Türkiye has made notable progress in realizing the decisions from the 3rd AFC. For example, MinAF took steps to optimize land use, conserve water, protect soil, improve climate resilience, and empower women in agriculture.

Annex 1: Decisions of 4th AFC, 2025

1. **Expand Strategic Product List:** Continue expanding the strategic product list for plant, animal, and aquatic production.
2. **Enhance Export Strategies:** Develop new strategies to increase exports of high-competitive and surplus plant products by converting them into value-added products.
3. **Legislation and Infrastructure for Pasture Protection:** Implement legislation and infrastructure to make the Ministry of Agriculture and Forestry solely responsible for pasture protection and invasion prevention and develop new projects considering climate change.
4. **Establish Agricultural Technology Development Zones:** Create and develop "Agricultural Technology Development Zones" and "R&D Centers," and encourage clustering in agricultural industries.
5. **Improve Plant Protection Product Processes:** Enhance production and licensing processes for plant protection products, promote biological and biotechnical control methods, and ban internationally prohibited products.
6. **Optimize Agricultural Land Use:** Activate the use of agricultural lands, expedite secondary legislation on inheritance law, develop land banking and integrated production systems, and implement land use plans.
7. **Regulate Urban and Vertical Farming:** Create regulations for urban and vertical farming and establish a system for the Ministry and local governments to collaborate on using idle urban agricultural lands.
8. **Increase and Develop Organized Agricultural Zones:** Expand and develop "Organized Agricultural Zones" and create new regions for soilless culture in areas with high geothermal potential.
9. **Enhance Producer Organizations:** Increase the effectiveness of producer organizations and ensure they cover the entire process from production to consumer.
10. **Support Basin-Based Assistance:** Determine basins based on agricultural potential rather than administrative boundaries for basin-based support.
11. **Include Other Financial Institutions in Support Payments:** Integrate other financial institutions into the support payment system to create competition.
12. **Develop Land Banking and Financial Mechanisms:** Develop land banking systems and financial mechanisms to increase the scale of small enterprises and ensure parcel integrity.
13. **Monitor and Register Nomadic Livestock Enterprises:** Develop systems and support models for monitoring and registering nomadic livestock enterprises.
14. **Complete Legislation for Biodiversity Protection:** Finalize the legislative infrastructure for biodiversity protection.
15. **Highlight Marine and Coastal Biodiversity:** Address and highlight marine and coastal biodiversity.
16. **Protect Genetic Resources:** Ensure the protection and sustainable use of genetic resources and enhance inter-institutional cooperation for inventory development.
17. **Establish AI-Supported Forest Management Systems:** Create AI-supported monitoring and evaluation systems for sustainable forest management and expand satellite data and AI-supported ecosystem monitoring networks.
18. **Develop Sustainable Forest Product Roadmap:** Focus on sustainable raw material supply and strategic product development in the forest products sector and prepare an action plan for scrap wood management.

19. **Strengthen Integrated Pest Management:** Develop integrated pest management and biological control applications and strengthen biological control laboratories.
20. **Promote Agroforestry for Climate Neutrality:** Strengthen efforts towards climate neutrality in land use and promote agroforestry practices.
21. **Increase Carbon Sink Capacity in Pastures and Forests:** Enhance the carbon sink capacity in pastures and forests.
22. **Enhance Forest Ecosystem Resilience:** Make forest ecosystems resilient to climate change, develop fire risk assessment and early warning systems, update fire-related legislation, and create distribution models for climate-resilient species.
23. **Evaluate Geopolitical Changes and Global Crises:** Assess the opportunities and threats posed by geopolitical changes, global crises, and wars on food prices and supply, and take measures against potential threats to the national food system.
24. **Implement One Health Approach:** Ensure multidisciplinary and effective measures to prevent antibiotic and pesticide residues in food, establish national One Health policies and strategies, and create a "National One Health Coordination Board."
25. **Increase Food Safety Awareness:** Raise awareness of food safety among producers and consumers and effectively combat misinformation.
26. **Prevent Food Loss and Waste:** Develop management strategies to prevent food loss and waste through inter-institutional cooperation, improve food preservation methods, support food banking, and inform producers and consumers.
27. **Harmonize Legislation for Industrial Biotechnological Applications:** Align legislation to develop and spread industrial biotechnological applications, increase domestic production, and create an incentive system to reduce dependency on imports.
28. **Develop Local and Short Supply Chains:** Develop local and short supply chains to reduce dependency on global and centralized supply chains due to climate crises, disasters, wars, and pandemics.
29. **Provide Social Security for Shepherds:** Provide social security opportunities for shepherds to meet the qualified workforce needs of livestock enterprises, determine professional qualifications, and establish "Shepherd Academies" and practical training centers.
30. **Support and Spread High-Performance Breeds:** Support and spread high-performance breeds resistant to diseases and adaptable to environmental conditions.
31. **Increase Small Ruminant Meat Production:** Increase the share of small ruminant meat production to 35% of total red meat production and implement relevant support and programs.
32. **Strengthen Domestic Animal Production:** Enhance domestic animal production in terms of both quantity and quality and protect local animal breeds.
33. **Activate Digital Marketplaces for Animal Products:** Implement digital marketplaces and blockchain-based direct sales systems for animal products.
34. **Align with the European Green Deal:** Increase efforts to align the agricultural sector with the European Green Deal.
35. **Strengthen Agricultural Production and Land Use Planning:** Enhance agricultural production and land use planning, complete soil survey mapping, and create a digital soil information system.
36. **Promote Minimum Tillage Techniques:** Promote minimum tillage techniques, increase soil carbon sequestration capacity, and utilize plant and animal waste for organic fertilizer production.

37. **Establish Early Warning Systems for Drought and Extreme Weather:** Create early warning systems for drought and extreme weather events and develop a digital agricultural drought monitoring system.
38. **Develop Climate-Resilient Plant and Animal Varieties:** Identify, develop, and use plant varieties and animal breeds resilient to expected climate change impacts.
39. **Increase Renewable Energy Use in Agriculture:** Increase the use of renewable energy in the agricultural sector and develop green growth strategies.
40. **Prioritize Rural Areas Based on Socio-Economic Structures:** Prioritize support and grant programs for rural areas based on their socio-economic structures, geographical locations, and distances from urban centers.
41. **Improve Rural Living Conditions:** Enhance services provided in rural areas, including health, education, transportation, communication, and social and cultural facilities, to improve sustainable living conditions.
42. **Include Women and Young Farmers in Social Security:** Include women and young farmers working in rural areas and the agricultural sector in state-supported social security.
43. **Revise Legislation for Agricultural Organizations:** Revise legislation to make agricultural organizations more effective and sustainable in the agricultural sector.
44. **Ensure Inter-Institutional Coordination in Agricultural and Rural Development Policies:** Ensure inter-institutional coordination in agricultural and rural development policies under the Ministry of Agriculture and Forestry and adopt a holistic approach for more efficient resource use.
45. **Strengthen Public Administration in Fisheries and Aquaculture:** Strengthen the public administration structure of the fisheries and aquaculture sector and consolidate responsibilities under a single entity.
46. **Create a Strong Production, Processing, and Marketing Structure in Fisheries:** Establish a strong production, processing, and marketing structure in the fisheries sector, and promote sustainable, planned, and balanced development in fishing and aquaculture activities.
47. **Manage Fisheries Stocks with a Balance of Conservation and Use:** Manage fisheries stocks with a balance of conservation and use, strengthen fishing activities outside national waters, and create a separate "Fisheries Protection Officer" structure to enhance control and inspection activities.
48. **Improve Fishermen's Shelters:** Improve fishermen's shelters and strengthen their management structure.
49. **Complete Legislation for Water and Flood Laws:** Finalize the legislative infrastructure for the "Water Law" and "Flood Law."
50. **Review Authority, Duties, and Responsibilities of Water-Related Institutions:** Reassess the authority, duties, and responsibilities of water-related institutions, and establish a centralized and integrated water management structure.
51. **Evaluate Alternative Water Sources:** Assess alternative water sources such as rainwater harvesting, greywater, and treated wastewater, and develop the necessary legal infrastructure.
52. **Reduce Daily Water Consumption:** Increase water savings and efficiency to reduce daily per capita water consumption from 150 liters to 120 liters by 2030.
53. **Convert Open Channel Irrigation Systems to Closed Pressurized Systems:** Convert open channel irrigation systems to closed pressurized systems and increase irrigation efficiency to 60% by 2030.

54. **Establish Early Warning Systems for Extreme Weather Events:** Create early warning systems for extreme weather events such as floods and droughts and establish "Drought Decision Support Systems" in 25 basins.
55. **Complete Sectoral Water Allocation Studies:** Complete sectoral water allocation studies nationwide and ensure their monitoring and updating.
56. **Prepare a National Drought-Resistant Landscape Strategy Document:** Prepare a national drought-resistant landscape strategy document, promote the use of low-water-consuming, drought-resistant plant species in landscape areas, increase drought-resistant landscape areas, and introduce legal regulations to limit water consumption for landscape projects.
57. **Establish a National Flood Forecasting and Early Warning System:** Establish a "National Flood Forecasting and Early Warning System" in all river basins and manage it effectively.
58. **Reduce Water Losses in Drinking Water Networks:** Reduce water losses in drinking water networks from 32% to 25% by 2030.
59. **Protect Groundwater Reserves:** Protect groundwater reserves and increase water use efficiency.
60. **Promote Clustering in the Agriculture-Industry-Logistics Triangle:** Encourage a clustering model that brings together stakeholders in the agriculture-food value chain within the agriculture-industry-logistics triangle.
61. **Promote Sustainable Logistics Solutions for Agricultural Products:** Reduce dependency on road transportation and promote rail and sea transportation with lower carbon footprints for safer and more sustainable logistics solutions for agricultural products.
62. **Locate Agro-Industrial Facilities Near Agricultural Production Areas:** Position agro-industrial facilities near agricultural production areas in suitable industrial zones, and redirect facilities that have lost their strategic importance to appropriate areas.
63. **Prepare Emergency Plans for Critical Product Supply:** Prepare emergency plans to secure the supply of critical products through domestic production based on pandemic and disaster experiences.
64. **Utilize Underground Storage and Natural Cold Storage Options:** Conduct necessary research by region and product to utilize underground storage, unused mines, and other natural cold storage options.
65. **Strengthen Agriculture-Industry Integration:** Enhance agriculture-industry integration through "Organized Agricultural Zones" and "Logistics Centers," consolidate marketing processes under one roof, and use non-agricultural lands for industrial and logistics purposes.
66. **Develop Cooperative Structures for Agriculture-Industry Integration:** Increase agriculture-industry integration and ensure continuity by developing cooperative structures and make agricultural sales cooperatives and unions more effective.
67. **Expand Wireless Network Technologies in Rural Areas:** Increase the spread of wireless network technologies, broadband, and mobile network technologies in rural areas, and strengthen telecommunications infrastructure in rural areas.
68. **Implement an Agricultural Observation Satellite Network:** Establish an "Agricultural Observation Satellite Network" and develop AI-supported prediction and monitoring systems for agricultural production.
69. **Assign a Research Institute for Digital Agriculture and Advanced Technologies:** Designate a research institute to conduct and coordinate research on digital agriculture, AI, and advanced agricultural technologies.

70. **Create a National Digital Agriculture Data Bank:** Establish and strengthen a "National Digital Agriculture Data Bank," prepare a national strategy document for agricultural remote sensing and imaging technologies and initiate an "Agricultural Blockchain Infrastructure."
71. **Improve Digital Agriculture Education Infrastructure:** Enhance the education infrastructure for digital agriculture in agricultural enterprises and organize digital agriculture literacy training programs for farmers and other stakeholders in the agricultural sector.
72. **Strengthen National and International Financing for Digital Agriculture:** Strengthen and ensure the effective use of national and international alternative financing incentives, grants, and infrastructure for the widespread adoption of digital agriculture.
73. **Design New Financial Instruments for Agriculture:** Design new financial instruments, examine purchase-guaranteed models, tax incentives, insurance support, and investment credits, and institutionalize an "Agricultural Finance R&D Unit" to guide national agricultural finance strategies.
74. **Establish Farmer Guarantee and Cooperative Finance Funds:** Create a "Farmer Guarantee Fund" and a "Cooperative Finance Fund" specific to the agricultural sector and add agricultural sub-components to existing funds.
75. **Establish a Traceable Inspection System for Geographical Indications:** Create a traceable inspection system for geographical indications and increase the benefits derived from geographical indications.
76. **Implement a Digital Market System for Agricultural Products:** Establish digital market systems for fruits, vegetables, dry foods, and meat products.
77. **Develop Green Financing Tools:** Conduct preliminary studies to develop green financing tools, increase credit access for green production farmers, and promote green logistics.
78. **Create an Agricultural Disaster Relief Risk Fund:** Establish the legal and institutional infrastructure and financial mechanisms for an "Agricultural Disaster Relief Risk Fund," and develop management and business processes.
79. **Develop Satellite and AI Technologies for Agricultural Insurance:** Enhance the use of satellite and AI technologies in the agricultural insurance system and develop financial tools to mitigate the impacts of disasters on agriculture.
80. **Align Production Planning Model with TARSIM Processes:** Harmonize the production planning model with TARSIM processes.
81. **Clarify Agricultural Profession Standards:** Define agricultural profession standards, redefine the farmer's role, increase professional knowledge of individuals involved in agriculture, strengthen and diversify education, extension, and consultancy links, diversify agricultural consultancy resources, and prepare legislation to include farming in the professional qualification scope.
82. **Continue Land Consolidation Efforts:** Continue land consolidation efforts.
83. **Increase Professional Human Resources in Agricultural Diplomacy:** Increase the number of professionals trained in agricultural diplomacy and strengthen Turkey's representation in international organizations.
84. **Strengthen the Brand Image of Turkish Agricultural Products:** Enhance the brand image of Turkish agricultural products, increase certified products, and support exporters' overseas organizations.
85. **Revise Trade Regime for Agricultural Products in Customs Union:** Revise the trade regime for agricultural products within the framework of the Customs Union's re-evaluation, update the roadmap for alignment with the EU Common Agricultural Policy, and expedite the process.

86. Establish Regional and International Agricultural Diplomacy Platforms: Create regional and international agricultural diplomacy platforms centered in Turkey under Turkey's leadership.

Annex 2: List of AFC Working Groups

1. Plant production
2. Support and Future of Policies
3. Natural Life Cycle and Biodiversity
4. Integrated and Sustainable Forestry Management
5. Food Security, Food Safety and Combatting Waste
6. Livestock/Animal Production
7. Adaptation to Climate Change
8. Rural Development, the Future of Rural Life and Employment
9. Aquaculture Production
10. Water Management and Efficiency
11. Agro-industry, Stock Management, Logistics
12. Digitalization in Agriculture, Data-based Agriculture and Technological Development
13. Agricultural Marketing and Financing
14. Agricultural Risk and Disaster Management
15. Effective Transformation in Agricultural Structure,
16. Adaptation to International Agricultural Developments and Competition

Attachments:

No Attachments.