

Azerbaijan Agricultural Sector: opportunities and challenges for cooperation with the Netherlands



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II. About PFF Agro Consulting LLC and the Assessment Team

PFF Agro Consulting LLC is an Azerbaijan-based agricultural consulting company providing advisory, research and analytical services in agriculture and agribusiness. Its areas of work include agricultural sector and value-chain assessments, market and investment analysis, stakeholder engagement, capacity building and the identification of opportunities for sector development and international cooperation. PFF Agro Consulting LLC prepared this agricultural sector assessment commissioned by the Embassy of the Kingdom of the Netherlands in Azerbaijan.

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Disclaimer

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III. Abbreviations

ACDA	Agrarian Credit and Development Agency
ADAU	Azerbaijan State Agricultural University
AFEZ	Alat Free Economic Zone
AFSA	Azerbaijan Food Safety Agency
AFSI	Azerbaijan Food Safety Institute
ARC	Agrarian Research Center
ASA	Agrarian Services Agency
AZN	Azerbaijani manat
AZPROMO	Export and Investment Promotion Agency of the Republic of Azerbaijan
BTK	Baku-Tbilisi-Kars railway
B.V.	Besloten Vennootschap, a Dutch private limited company
CIS	Commonwealth of Independent States
DAIM	State Agricultural Development Center
DUS	Distinctness, Uniformity and Stability
EKTIS	Electronic Agriculture Information System
EU	European Union
FEZ	Free Economic Zone
FTA	Free Trade Agreement
GDP	Gross Domestic Product
HACCP	Hazard Analysis and Critical Control Points
HS	Harmonized System
MoU	Memorandum of Understanding
PCR	Polymerase Chain Reaction
PVP	Plant Variety Protection
QA/QC	Quality Assurance and Quality Control
RVO	Netherlands Enterprise Agency
SOCAR	State Oil Company of the Republic of Azerbaijan
UPOV	International Union for the Protection of New Varieties of Plants
VAT	Value-Added Tax
WITS	World Integrated Trade Solution
WTO	World Trade Organization

IV. Executive Summary

This assessment reviews Azerbaijan's agricultural sector from the perspective of future cooperation with the Netherlands. It looks at where Azerbaijan's agriculture is today, what the main modernization needs are, and where Dutch companies, knowledge institutions and investors can add practical value. The report shows that Azerbaijan has a broad agricultural base, with opportunities in horticulture, greenhouse production, floriculture, seeds and planting materials, water management, livestock genetics, dairy, cold chain, processing, and agrifood logistics. These areas are important because the country is trying to improve productivity, reduce import dependence, strengthen food security, increase non-oil exports and develop more competitive value chains. For Dutch stakeholders, the assessment identifies where market demand already exists and where cooperation can be realistic. It highlights that Azerbaijan needs not only equipment and agricultural inputs but also integrated ecosystem solutions that combine reliable after-sales service, technical advisory support, farmer capacity building, local testing and adaptation, and long-term cooperation with local partners. The Netherlands can add significant value in the Azerbaijani market through its integrated cluster or ecosystem approach. This approach can be demonstrated through pilot projects, the development of reliable distribution networks, joint ventures, and investment models connected to agroparks, industrial zones, and other priority regions, showcasing the benefits of Dutch expertise and fostering long-term partnerships. The assessment also provides an overview of the investment environment, highlighting available incentives, subsidies, benefits offered by industrial parks, opportunities within agroparks, advantages of the Alat Free Economic Zone, and special support measures in the Karabakh and East Zangezur regions. This enables investors to identify the support mechanisms most relevant to their specific agribusiness projects and make more informed investment decisions.

When looking at bilateral trade figures, it is important to consider that official statistics may not show the full scale of Dutch business activity in Azerbaijan. One reason is that Dutch companies often supply products and equipment from production or distribution centres located in other countries. In such cases, the value may appear in Azerbaijan's import statistics but not be recorded as an export from the Netherlands.

Beyond what is reflected in bilateral trade statistics, *existing cooperation and market engagement* involving Dutch companies such as Bosman Van Zaal, Prins Group, APH Group, Koppert, Rijk Zwaan, Enza Zaden, Bejo, CRV, Globifield Impex B.V., Hoogendoorn, Lumiforte International, Meteor Systems and Dutch Plantin, together with Azerbaijani partners such as AzRose, Grow Group Azerbaijan, Improvet and others demonstrate that Dutch-Azerbaijani agricultural cooperation is already active across greenhouse horticulture, floriculture, seeds and planting materials, biological crop protection, irrigation and post-harvest technologies, and livestock genetics. These examples show that Dutch solutions can be successfully adapted to the Azerbaijani market and provide a strong foundation for deeper commercial, investment and knowledge-based partnerships.

V. Source and Methodological Approach

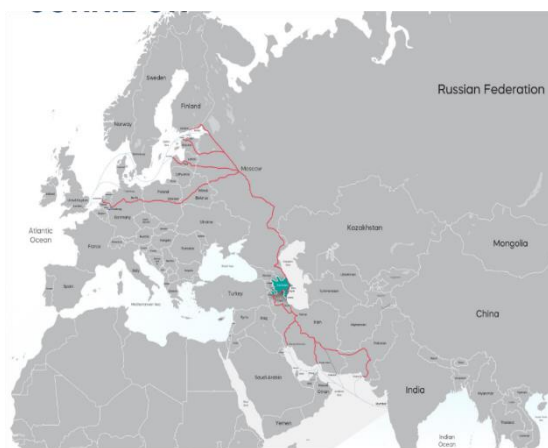
This assessment is based on official statistical data, customs statistics, institutional reports, sector analyses, and stakeholder consultations. The main sources include the State Statistical Committee of the Republic of Azerbaijan, the State Customs Committee of the Republic of Azerbaijan, the Ministry of Agriculture of the Republic of Azerbaijan, and the Agrarian Research Center under the Ministry of Agriculture. The report also reflects information from official government sources, international databases, and discussions with public and private sector representatives, including interviews with Dutch companies and their partners in Azerbaijan. Information obtained through stakeholder consultations has been cross-checked against publicly available sources where possible.

1. Country Context

Azerbaijan's location and regional connectivity

Azerbaijan is strategically located in the South Caucasus, on the western coast of the Caspian Sea and at the intersection of Europe and Asia. It borders Russia to the north, Georgia and Türkiye to the west, Iran to the south and Armenia to the west and southwest. This position places the country close to several large and diverse markets and gives it potential to serve as a production, processing and distribution base for agricultural and food products destined for the Caucasus, Türkiye, Central Asia, Russia and, through wider transport networks, European markets. Azerbaijan lies at the intersection of the East-West and North-South transport corridors. The East-West route, also known as the Middle Corridor or Trans-Caspian International Transport Route, connects China and Central Asia with Europe through the Caspian Sea, Azerbaijan, Georgia and Türkiye. The North-South Corridor connects markets in India and the Persian Gulf with Iran, Azerbaijan, Russia and Northern Europe. Participation in both corridors strengthens Azerbaijan's potential role as a regional transit and logistics hub rather than solely as an end market.

Map 1. North-South Connectivity



Map 2. East-West Connectivity



Source: Map 1: <https://transit.gov.az/en/corridors/north-south-corridor> - last accessed: 2 July 2026.
Map 2: <https://transit.gov.az/en/corridors/east-west-corridor> - last accessed: 2 July 2026.

The country's connectivity is supported by a multimodal transport system combining roads, railways, maritime transport and logistics facilities. The Baku International Sea Trade Port at Alat provides a maritime connection across the Caspian Sea to Central Asian markets, while the Baku-Tbilisi-Kars railway connects Azerbaijan through Georgia to Türkiye and onward to European transport networks. These assets create potential routes for the movement of agricultural commodities, processed food, production inputs, machinery and temperature-controlled cargo.

Economic Context and Non-oil Diversification

Azerbaijan is an upper-middle-income economy with substantial hydrocarbon resources, and oil and gas revenues have historically played a major role in economic growth, exports and investment. In 2025, GDP reached AZN 129.1 billion (approximately USD 75.9 billion), representing real growth of 1.4%. The non-oil and gas sector grew by 2.7%, while value added in the oil and gas sector declined by 1.6%.

Economic diversification is a key national policy priority. The “Azerbaijan 2030¹: National Priorities for Socio-Economic Development” framework emphasizes the development of a competitive economy, stronger human capital and innovation, balanced regional development, reintegration of the liberated territories and green growth. These priorities are supported by the 2022-2026 Socio Economic Development Strategy² and are intended to strengthen economic resilience, increase private-sector activity and develop more sustainable sources of employment, production and exports.

Recent indicators point to continued expansion of economic activity outside the hydrocarbon sector. In the first half of 2025, private-sector investment in the non-oil and gas sector increased by 27.8% year-on-year to approximately AZN 2.2 billion³. Agriculture has an important role in this diversification agenda through its contribution to domestic food supply, rural employment, regional incomes, agro-processing and non-oil exports. For investors, opportunities extend beyond primary agricultural production to irrigation, agricultural inputs, machinery, storage and cold chain, processing, logistics and technology-based services. At the same time, investment opportunities should be assessed against constraints including productivity gaps, water availability, farm fragmentation, access to finance and the competitiveness of individual value chains.

Territory and agro-climatic diversity

Azerbaijan covers a territory of 86,600 km² and has an unusually varied physical landscape for a country of its size. Its territory includes the Greater Caucasus in the north, the Lesser Caucasus in the west and southwest, the Kura-Araz lowland in the centre, the Talysh Mountains and Lankaran lowland in the southeast, the Absheron Peninsula along the Caspian coast, and the geographically separated Nakhchivan Autonomous Republic. Elevation ranges from areas below sea level along the Caspian coast to high mountain zones exceeding 4,000 metres. This combination of plains, foothills, mountain valleys and coastal areas strongly influences land use, water availability, crop selection and the organization of agricultural production. Azerbaijan lies at the northern edge of the subtropical zone and has highly varied climatic conditions due to differences in elevation, terrain and proximity to the Caspian Sea. Its climate ranges from dry semi-desert lowlands to humid subtropical and alpine zones, supporting diverse crop and livestock production. From an investment perspective, this diversity creates opportunities for open-field farming, intensive orchards, greenhouse horticulture, subtropical crop production, seed and varietal development, pasture-based livestock farming and region-specific processing. It may also allow production seasons to be extended by sourcing products from areas with different elevations and climatic conditions.

Administrative and economic regions

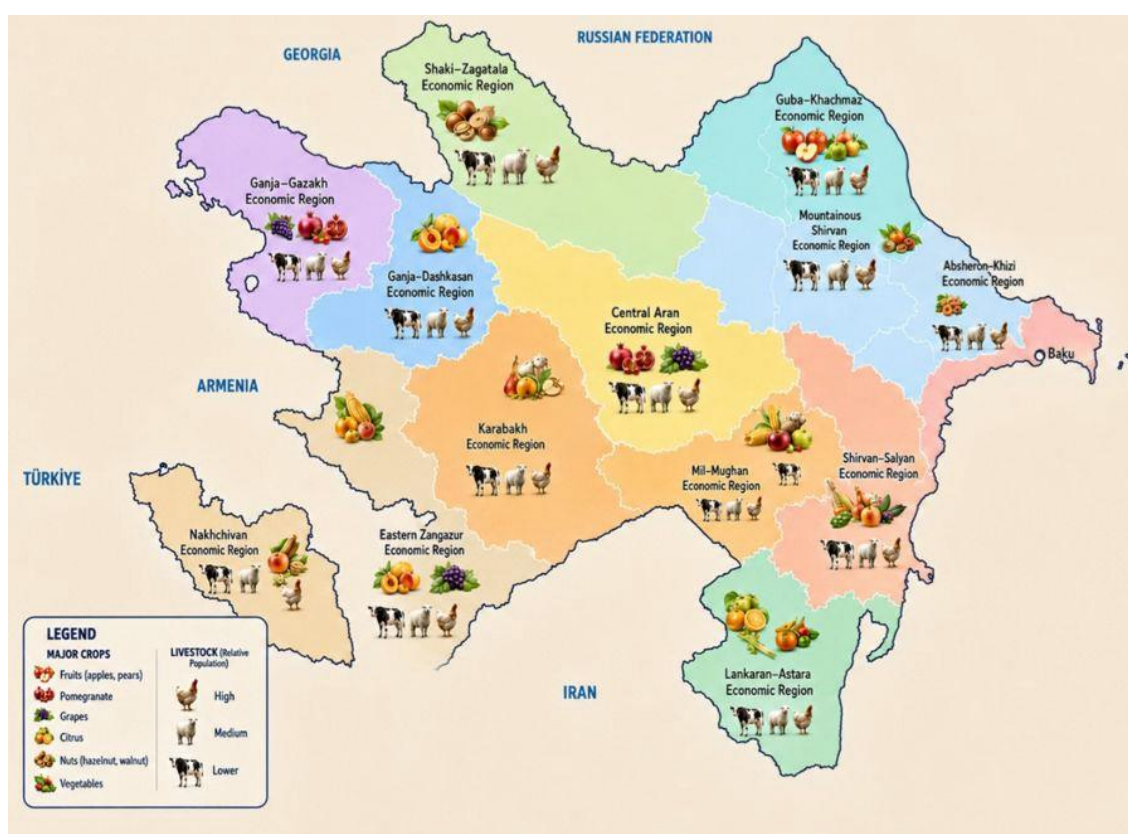
Azerbaijan’s administrative-territorial system comprises districts, cities and the Nakhchivan Autonomous Republic. These units provide the framework for local governance, public administration and the delivery of services across the country. For economic planning and statistical analysis, Azerbaijan is divided into 14 economic regions. The current division was introduced in 2021 and includes Baku, Nakhchivan, Absheron-Khizi, Daghlig Shirvan, Ganja-Dashkesen, Karabakh, Gazakh-Tovuz, Guba-Khachmaz, Lankaran-Astara, Central Aran, Mil-Mughan, Shaki-Zagatala, East Zangezur and Shirvan-Salyan. The economic regions differ in climate, land resources, water availability, infrastructure and agricultural specialization.

¹ Presidential Administration of the Republic of Azerbaijan: <https://president.az/en/articles/view/50474> - last accessed: 20 August 2026

² Presidential Administration of the Republic of Azerbaijan: <https://president.az/az/articles/view/56723> - last accessed: 20 August 2026

³ Ministry of Economy of the Republic of Azerbaijan: <https://www.economy.gov.az/en/post/2850/ozel-sektor-terefinden-qeyri-neft-qaz-sektoruna-yoneldilen-investisiyalar-artib> - last accessed: 20 August 2026

Map 3. Map of major crops and livestock by economic regions.



Source: Map compilation based on data from the State Statistical Committee of the Republic of Azerbaijan, *Agriculture of Azerbaijan 2025* and *Regions of Azerbaijan 2025*.

Agricultural land availability

As of 1 January 2025, agricultural land covered approximately 55.1% of Azerbaijan's territory⁴, equivalent to around 4.78 million hectares⁵. This figure has remained broadly stable compared with the previous year, when agricultural land accounted for 55.2% of the national territory⁶. The agricultural land base⁷ includes approximately 2.04 million hectares of arable land, 2.31 million hectares of pastures, 273,500 hectares under permanent crops, 108,900 hectares of hayfields and 54,300 hectares of fallow land. In addition, land degradation reduces the effective agricultural land base. *the Azerbaijan National Ecosystem Assessment: Summary for Policymakers*⁸ estimates that around 0.6 million hectares of land, equivalent to about 7% of Azerbaijan's territory, is adversely affected by



⁴ State Statistical Committee of the Republic of Azerbaijan:

https://www.stat.gov.az/menu/6/statistical_yearbooks/source/agriculture_2025.pdf - last accessed: 2 July 2026.

⁵ State Statistical Committee of the Republic of Azerbaijan - Azerbaijan in Figures 2026:

https://stat.gov.az/menu/6/statistical_yearbooks/source/azfigures_2026.pdf - last accessed: 2 July 2026.

⁶ State Statistical Committee of the Republic of Azerbaijan - Azerbaijan in Figures 2025:

https://www.stat.gov.az/menu/6/statistical_yearbooks/source/azfigures_2025.pdf - last accessed: 2 July 2026.

⁷ State Statistical Committee of the Republic of Azerbaijan - Azerbaijan in Figures 2026, Table 13.1:

https://stat.gov.az/menu/6/statistical_yearbooks/source/azfigures_2026.pdf - last accessed: 2 July 2026.

⁸ Azerbaijan National Ecosystem Assessment - Summary for Policymakers:

<https://www.ecosystemassessments.net/content/uploads/2024/03/AZERBAIJAN-NEA-SPM-2024.pdf> - last accessed: 2 July 2026.

salinization to the extent that it is no longer suitable for agriculture. Compared with the country's approximately 4.78 million hectares of agricultural land, this represents roughly 12.6% of the agricultural land base.

Water Resources and Irrigation

Azerbaijan's agriculture relies on rivers, reservoirs, groundwater and an extensive network of main and field irrigation canals. The Kura and Araz river basins are particularly important for irrigated production in the country's arid and semi-arid lowlands, where rainfall alone is generally insufficient for stable crop production. Water efficiency remains a major challenge because parts of the irrigation network are ageing and significant losses occur during water conveyance and distribution. Under the national water programme, the Government plans to construct around 30 reservoirs and build or reconstruct more than 200 kilometres of main canals and a similar length of distribution networks, while expanding digital monitoring and water measurement. Modern irrigation systems currently cover approximately 130,000 hectares of agricultural land. The Government aims to increase this area to 300,000 hectares through greater use of drip and sprinkler irrigation, closed water networks and improved water management, creating an important field for agricultural technology and investment⁹.

Agriculture's contribution to GDP and employment, population

Agriculture remains strategically important to Azerbaijan's economic diversification, food security and regional development. In 2025, agriculture, forestry and fishing accounted for 5.9% of national GDP, while agricultural production represented 8.3% of non-oil GDP¹⁰, according to the Minister of Agriculture on 25 May 2026, during a meeting on agricultural issues chaired by President Ilham Aliyev. The sector has an even greater role in employment. Official statistics show that approximately 1.78 million people were employed in agriculture, forestry and fishing in 2024, representing about 35.4% of Azerbaijan's total employed population. With a population of approximately 10.24 million as of mid-2025, including 45.6% living in rural areas, Azerbaijan has both a sizeable domestic food market and a substantial rural population whose livelihoods remain closely linked to agriculture and related value chains.

Food security

Food security is a strategic priority for Azerbaijan because the country combines strong domestic production in several agricultural products with continued import dependence in some essential food categories. According to the latest official food balances for 2024, self-sufficiency reached 105.8% for vegetables, 128.5% for fruits and berries, 101.7% for melons and 103.7% for eggs, indicating domestic surpluses and potential for processing and export development. At the same time, self-sufficiency remained lower for wheat at 56.1%, total meat and meat products at 83.4%, poultry meat at 76.6%, milk and dairy products at 83.9%, fish and fish products at 77.3%, and vegetable oils at 55.6%¹¹. These gaps point to potential investment opportunities in productivity improvement, livestock and dairy development, feed and genetics, oilseed production and processing, aquaculture, storage, processing and other technologies that can strengthen domestic supply chains.

Food safety

Azerbaijan's food safety system is regulated under the Law on Food Safety and administered by the Azerbaijan Food Safety Agency (AFSA), which is responsible for food and feed safety,

⁹ Presidential Administration of the Republic of Azerbaijan: <https://president.az/en/articles/view/72507> - last accessed: 2 July 2026.

¹⁰ <https://report.az/en/aic/agriculture-accounts-for-8-3-of-azerbaijan-s-non-oil-gdp-in-2025-minister> - last accessed: 2 July 2026.

¹¹ State Statistical Committee of the Republic of Azerbaijan: https://www.stat.gov.az/menu/6/statistical_yearbooks/source/food_balances_2025.pdf - last accessed: 3 February 2026.

veterinary and phytosanitary controls, business registration and approval, certification, and risk-based supervision throughout the food chain. Food businesses operating in production, processing, storage, transport, import and distribution must comply with registration or approval requirements according to the type and risk level of their activities. The legislation also requires food businesses to establish traceability systems that identify suppliers and customers at each stage of the supply chain. The application of HACCP-based food safety procedures is mandatory for relevant food businesses. For investors in processing, dairy, meat, poultry, storage and other higher-risk activities, this requires documented hazard analysis, identification of critical control points, monitoring procedures, hygiene controls and record keeping. Domestic and imported food products are subject to risk-based official control. Depending on the product's risk level, controls may include document checks, identity checks, physical inspection, sampling and laboratory testing. Foreign establishments producing certain high-risk products for export to Azerbaijan must also be approved by AFSA before their products can enter the market. Investors must also consider product-specific veterinary, phytosanitary and import requirements, as well as Azerbaijani-language labelling obligations. Export-oriented businesses may require health, veterinary or phytosanitary certification depending on the product and destination market.

In September 2026, Azerbaijan approved the State Programme on Ensuring Food Safety in the Republic of Azerbaijan for 2027 - 2032¹². The Programme aims to further align Azerbaijan's food safety, animal health and plant health systems with international requirements and strengthen controls throughout the food supply chain. Key priorities include *improved traceability and electronic certification, stronger laboratory and risk-assessment capacity, veterinary and phytosanitary controls, food safety monitoring, and stronger import-export control and international cooperation*. The Programme also places emphasis on facilitating access of Azerbaijani food products to foreign markets, including through internationally compatible certification and control systems.

Crop and livestock production

Azerbaijan has a broadly balanced agricultural structure. At the meeting on agricultural issues chaired by President Ilham Aliyev on 25 May 2026, Minister of Agriculture Majnun Mammadov reported that total agricultural production reached approximately 14.1895 billion (USD 8.35 billion) in 2025 and was divided almost equally between crop (AZN 6.7485 billion) and livestock (AZN 7.4410 billion) production¹³. This balance means that both subsectors are central to food security, rural employment and future agricultural investment. Crop production is diversified across staple crops, horticulture and industrial crops. Cereals and dried pulses, particularly wheat and barley, form the largest group by cultivated area and remain strategically important for food and feed security. Other major crop categories include potatoes, vegetables such as tomatoes, cucumbers, onions, peppers and cabbage, melons, fruits and berries, including apples, hazelnuts, pomegranates, persimmons, grapes and citrus fruits, fodder crops, and industrial crops such as cotton, sugar beet, sunflower and tobacco. In 2024, Azerbaijan produced approximately 3.20 million tonnes of cereals and dried pulses, 1.84 million tonnes of vegetables, 1.32 million tonnes of fruits and berries and 927,400 tonnes of potatoes.

Livestock production is a major component of Azerbaijani agriculture and includes cattle, sheep and goats, poultry, milk, meat and eggs. In 2024, Azerbaijan produced approximately 2.30 million tonnes of milk, 386,300 tonnes of meat and 2.30 billion eggs, with beef and poultry accounting for the largest shares of meat output.

Farm Structure and Commercial Agriculture

Azerbaijan's agricultural production is still dominated by private owners, family-peasant farms and household producers. In 2024, these categories generated 88.5% of gross agricultural output,

¹² State Programme on Ensuring Food Safety in the Republic of Azerbaijan for 2027 - 2032:

<https://president.az/az/articles/view/73479> - last accessed: 15 September 2026

¹³ Presidential Administration of the Republic of Azerbaijan: <https://president.az/en/articles/view/72507> - last accessed: 3 June 2026.

including 86.7% of crop production and 90.2% of livestock production, while agricultural enterprises accounted for the remaining 11.5%¹⁴. This structure provides a broad rural production base but can make the aggregation of consistent volumes, quality control, mechanization and traceability more difficult. The commercial segment is smaller but increasingly important for technology-based and larger-scale production. At the end of 2024, Azerbaijan had 1,194 registered agricultural enterprises, of which 1,060 were privately owned, alongside 736 registered individual farming enterprises. Fragmentation is especially visible in livestock farming. At the beginning of 2025, private owners, family farms and households held approximately 97.8% of cattle and buffaloes and 97.8% of sheep and goats, while agricultural enterprises held a much larger share of poultry 42.6% reflecting the more industrial and commercially concentrated structure of poultry production. Alongside small farms, Azerbaijan has developed agroparks and large commercial farms that combine production with irrigation, storage, processing and logistics. Government envisaged the establishment and development of 51 agroparks and large agricultural farms covering approximately 239,300 hectares in 32 districts¹⁵. Under the current formal registration framework, the Agropark Azerbaijan portal reports 25 registered agroparks¹⁶ covering more than 69,413 hectares.

The large number of small and family farms can limit the uptake of modern agricultural technologies, as many farmers lack the financial capacity to invest individually in irrigation, machinery, greenhouse systems and post-harvest equipment. *Azerbaijan has various subsidy and support mechanisms for agricultural investment*, although access and use differ across farmers and enterprises. Further details are provided in **Annex 3: Agricultural Subsidies**.

Agricultural Trade and Market Access

Trade between Azerbaijan and the Netherlands provides an established commercial basis for further agricultural cooperation. According to the State Customs Committee, in 2025 Azerbaijan exported approximately USD 200.1 million worth of goods to the Netherlands and imported approximately USD 122.5 million, bringing bilateral merchandise trade to around USD 322.5 million¹⁷.

Azerbaijan-Netherlands trade, 2025	USD million
Azerbaijan exports to Netherlands	200.1
Azerbaijan imports from Netherlands	122.5
Total bilateral merchandise trade	322.5

Azerbaijan's exports to the Netherlands remain highly concentrated in energy products: crude oil accounted for approximately USD 182.9 million, or more than 90% of Azerbaijan's exports to the Dutch market in 2025. By contrast, imports from the Netherlands are more diversified and include higher-value equipment, technologies and agricultural inputs including *seeds and planting materials, greenhouse technologies, irrigation and water-management solutions, agricultural machinery, livestock genetics, biological crop protection, post-harvest and cold-chain systems, and precision agriculture*. These areas correspond closely with Azerbaijan's agricultural modernization needs and provide opportunities for Dutch suppliers, technology providers and investors.

¹⁴ State Statistical Committee of the Republic of Azerbaijan:

https://www.stat.gov.az/menu/6/statistical_yearbooks/source/agriculture_2025.pdf - last accessed: 09 August 2026.

¹⁵ Ministry of Economy of the Republic of Azerbaijan: <https://www.economy.gov.az/en/post/1144/iqtisadi-zonalarin-inkisafi-agentliyyinde-2022-ci-ilin-yekunlarina-dair-metbuat-konfransi-kecirilib> - last accessed: 09 August 2026

¹⁶ <https://agropark.az/> - last accessed: 08 September 2026

¹⁷ State Customs Committee of the Republic of Azerbaijan:

https://customs.gov.az/uploads/foreign/2025/2025_12.pdf?v=1768974361&utm - p.21, last accessed: 23 August 2026

Investment Incentives, Agricultural Finance and Support Mechanisms

Azerbaijan offers a generally open framework for local and foreign investment, including in agriculture, food processing, logistics and related services¹⁸. Investors may benefit from several government support mechanisms, depending on the type, location and scale of the project. Qualifying projects may receive an *Investment Promotion Certificate*, which provides benefits for seven years, including a 50% reduction in profit or income tax, exemption from property and land taxes, and exemption from VAT and customs duties on eligible imported machinery, technological equipment and installations¹⁹. Eligibility is subject to the applicable investment criteria established by the Government. Agricultural producers also operate under a favourable tax and support framework. Subject to the conditions established by law, agricultural producers benefit from exemptions from income or profit tax, VAT, simplified tax and property tax on assets used for agricultural production²⁰. The sector is further supported through crop and product subsidies, financing for agricultural machinery and irrigation systems, livestock-related support, concessional loans and other state-supported instruments. Applications and subsidy payments are administered through the Electronic Agriculture Information System (EKTIS), while subsidy rates, eligible crops, regions and coefficients are determined by the Agrarian Subsidy Council and may change according to annual policy priorities (see Annex 3).

Agricultural finance is available through commercial banks, non-bank credit institutions and state-supported mechanisms, including programmes administered by the Agrarian Credit and Development Agency (ACDA) under the Ministry of Agriculture²¹. These mechanisms include concessional loans and microloans, as well as preferential financing for agricultural machinery, equipment and breeding animals through authorised financial institutions.

Azerbaijan also operates a state-supported agricultural **insurance system**²² covering eligible crops, livestock and aquaculture against specified risks. The state covers 50% of the insurance premium, while the producer pays the remaining 50%. Coverage, deductibles and compensation conditions depend on the relevant insurance product and location.

Additional incentives are available for qualifying businesses operating in Karabakh and East Zangezur²³. Until 1 January 2033, eligible residents may benefit from exemptions from profit or income tax, property tax, land tax and simplified tax, as well as VAT and customs-duty exemptions for eligible imported equipment and raw materials. Additional support mechanisms include state-guaranteed loans, interest subsidies and utility subsidies. These measures may be particularly relevant for agricultural investments in greenhouse production, irrigation, machinery, cold storage, food processing and other technology-intensive activities.

*Aghdam Industrial Park and Araz Valley Economic Zone*²⁴ Industrial Park²⁵ provide further investment opportunities in the liberated territories. Eligible residents benefit from tax and customs incentives and have access to state-funded infrastructure within the parks.

For Azerbaijani companies seeking cooperation with Dutch partners, these domestic support mechanisms can reduce the cost of technology adoption and investment. At the same time, Dutch companies and joint ventures may explore complementary financing and risk-support

¹⁸ Ministry of Economy of the Republic of Azerbaijan: <https://economy.gov.az/en/page/iqtisadiyyat/investisiya/investisiya-muhiti> - last accessed: 23 August 2026.

¹⁹ Ministry of Economy of the Republic of Azerbaijan: <https://www.economy.gov.az/en/page/itm> - last accessed: 23 August 2026

²⁰ State Tax Service of the Republic of Azerbaijan: <https://taxes.gov.az/en/page/biznese-nece-baslamali> - last accessed: 23 August 2026

²¹ Agrarian Credit and Development Agency: <https://www.akia.gov.az/en/content/55.html> - last accessed: 23 August 2026

²² Ministry of Agriculture of the Republic of Azerbaijan: <https://www.agro.gov.az/az/news/azerbaycanda-ilk-defe-aqrar-sigorta-kalkulyatoru-istifadeye-verilib> - last accessed: 23 August 2026

²³ Ministry of Economy of the Republic of Azerbaijan: <https://economy.gov.az/en/page/qarabag-ve-serqi-zengezurda-biznes-qurmaq-ucun-dovletin-gosterdiyi-destek-ve-guzestlerden-yararlana-bilersiniz-sms-ucun-metn> - last accessed: 23 August 2026

²⁴ Ministry of Economy of the Republic of Azerbaijan: <https://www.economy.gov.az/index.php/en/post/2861/iscaldan-azad-edilmis-erazilerde-istehsal-ve-investisiya-fealligi-artir> - last accessed: 23 August 2026

²⁵ Ministry of Economy of the Republic of Azerbaijan: <https://economy.gov.az/en/page/senaye-zonlari/senaye-parklari> - last accessed: 23 August 2026

instruments available through Dutch institutions such as **RVO, Invest International, FMO and Atradius Dutch State Business**. These instruments may support feasibility studies, demonstration projects, market entry, investment financing and export-credit insurance (see Annex 4). Together, these mechanisms can create opportunities for projects that combine Azerbaijani investment incentives and agricultural support with Dutch technology, expertise and financing.

2. Regulatory and Institutional Framework for Agricultural Investors

Agricultural investment in Azerbaijan is regulated through a combination of *agricultural, food-safety, veterinary, phytosanitary, seed, water, land, subsidy, customs and investment legislation*. The Ministry of Agriculture leads national agricultural policy, while specialised agencies are responsible for registration, certification, testing, subsidies, finance, food safety, animal health, plant health and water management. Investors should confirm regulatory requirements at an early stage because the applicable procedure depends on the product, activity and investment model. A detailed list of the main institutions, laboratories, responsibilities and contact points is provided in **Annex 1**.

Horticulture, Greenhouses and Floriculture

Horticulture, greenhouse production and floriculture are mainly regulated through agricultural policy, food-safety rules, phytosanitary control, seed and planting-material requirements, pesticide and agrochemical registration, subsidy mechanisms and investment regulations. The Ministry of Agriculture is responsible for sector policy and agricultural development, while the Agrarian Services Agency manages important procedures related to seeds, planting materials, plant varieties and agricultural services. The Azerbaijan Food Safety Agency is responsible for plant-health controls, quarantine measures, import permits and phytosanitary certification. Companies importing seedlings, flower bulbs, young plants, seeds or other planting materials must meet phytosanitary and quarantine requirements. Export oriented producers must also comply with the plant-health, traceability, residue and certification rules of the destination market. Pesticides, biological-control products, fertilisers and agrochemicals must be registered and used in accordance with national requirements. Greenhouse and horticulture investors should therefore confirm product registration, permitted use, storage, residue-control and labelling requirements before entering the market.

Seeds, Planting Materials and Plant Variety Protection

The seed sector is regulated by the Law on Seed Production, the Law on Selection Achievements and the Law on Phytosanitary Control. These laws govern seed production, certification, circulation, variety registration, breeder protection and the import of seeds and planting materials. New varieties generally require examination, trials and registration before commercial use or subsidy eligibility. Certified seeds and seedlings must be entered in the relevant state register and supported by documents confirming their variety and sowing quality. Azerbaijan is a member of the International Union for the Protection of New Varieties of Plants (UPOV). This provides an international basis for breeder rights, but practical protection also depends on national registration, licence agreements, royalty arrangements and enforcement. Imported seeds, seedlings and planting materials require phytosanitary permits, certificates and laboratory testing.

Livestock, Dairy and Poultry

Livestock, dairy and poultry activities are regulated through veterinary, animal health, breeding, feed safety, food safety, import control, traceability and subsidy frameworks. The Ministry of Agriculture is responsible for livestock policy, breeding development and agricultural support. The Azerbaijan Food Safety Agency oversees veterinary control, animal health, feed safety, food safety, certification and approval of regulated establishments. Livestock farms, poultry

enterprises, hatcheries, dairy processors, slaughterhouses, feed operators and storage facilities are required to obtain registration or approval and must comply with hygiene, veterinary, biosecurity and traceability requirements. Imports of live animals, bovine semen, embryos, feed, veterinary medicines and animal origin products may require veterinary certificates, import permits, laboratory tests and approval of the exporting establishment. The bilateral veterinary certificate for bovine semen exports from the Netherlands to Azerbaijan provides a clearer regulatory pathway for Dutch cattle-genetics cooperation. It sets requirements for approved semen-collection centres, donor-animal health, quarantine, testing, identification and traceability.

Food Processing, Storage and Cold Chain

Food processors, dairy plants, slaughterhouses, packing facilities, cold stores and other food businesses are regulated mainly by the Azerbaijan Food Safety Agency. Depending on the activity, businesses may require registration, approval, inspections, food-safety procedures, traceability systems and laboratory testing. Facilities targeting modern retail or export markets may also need internationally recognised systems such as HACCP and destination market certification.

Water, Irrigation and Land Reclamation

Water use, irrigation, drainage and land reclamation are regulated mainly by the Water Code and the Law on Melioration and Irrigation. The Azerbaijan State Water Resources Agency is the principal institution responsible for water resource management, irrigation infrastructure, reservoirs, canals, drainage and agricultural water delivery. Investors in irrigated agriculture should verify the source, quality, seasonal availability, allocation and delivery cost of water before selecting a site. Projects involving canals, drainage, reservoirs or public irrigation infrastructure may also require coordination and technical approval from the responsible water authority. Modern irrigation equipment, including drip and sprinkler systems, may qualify for state supported financing or subsidy mechanisms. Eligibility depends on the equipment, supplier, farmer registration and current programme rules. Land-intensive projects should also confirm land ownership or lease rights, cadastral boundaries, soil quality, salinity, drainage, access roads and utility connections before investment.

Investment, Customs and Tax Framework

The Ministry of Economy and AZPROMO are the main institutions supporting foreign investment, investor engagement and business matchmaking. Foreign investors may establish local companies, enter joint ventures or operate through contractual and distribution arrangements, subject to applicable registration, tax and licensing requirements. Eligible projects may benefit from investment promotion measures, customs and tax incentives, industrial-zone benefits or special incentives available in designated territories. The availability of these benefits depends on the project type, location, investment size and formal approval. The State Customs Committee is responsible for customs clearance, tariff classification, import duties, VAT and application of approved exemptions. Investors should calculate the full landed cost of imported machinery, seeds, animals, equipment and inputs before market entry.

Before beginning operations, Dutch investors should:

- Determine the appropriate legal form for operating in Azerbaijan, such as a locally incorporated company, branch or representative office.

- Complete state and tax registration. Foreign-invested commercial entities are registered through the State Tax Service's one-stop registration system²⁶.
- Prepare and apostille the required foreign corporate documents where applicable, including founding documents, trade-register extracts and powers of attorney.
- Provide and maintain the required beneficial-owner information as part of the company registration framework²⁷.
- Register the business premises or operating facility with the tax authorities and open the necessary bank account for business operations.
- Identify the competent authority and confirm whether the proposed agricultural activity, product or technology requires licences, permits, registration, testing, phytosanitary, veterinary, food-safety or other sector approvals.
- Confirm import, customs, certification and conformity requirements before importing seeds, planting material, machinery, livestock genetics, biological products or other agricultural inputs.
- Include registration, approval, testing and customs-clearance periods in the business plan
- Verify land-use rights, water availability, irrigation access, utilities, logistics and other infrastructure before committing to a site.
- Confirm eligibility separately for tax incentives, investment-promotion measures, agricultural subsidies and other support programmes, as eligibility depends on the project and applicable criteria.
- Assess employment, immigration and work-permit requirements where Dutch or other foreign specialists will work in Azerbaijan.
- Use formal contracts covering ownership, payment, warranties, after-sales service, intellectual property, distribution rights and dispute resolution.
- Maintain complete records for tax, customs, traceability, inspections, certification and any subsidy or incentive verification.
- Work with qualified Azerbaijani legal, tax, customs, technical and regulatory advisers before implementation.

The detailed division of responsibilities among the Ministry of Agriculture, Agrarian Services Agency, Azerbaijan Food Safety Agency, Agrarian Credit and Development Agency, Azerbaijan State Water Resources Agency, laboratories and other institutions is presented in **Annex 1**.

3. Opportunities and Challenges in Azerbaijan's Agricultural Sector

The opportunities and challenges in Azerbaijan's agricultural sector were discussed at a high-level meeting chaired by President Ilham Aliyev on 25 May 2026. On the same day, the State Program for the Development of Agricultural, Fisheries and Aquaculture Production and Processing Sectors for 2026 - 2030 was approved by Presidential Order²⁸. This Program now serves as the main policy framework for the next stage of agricultural development in the country. The planned State Program is expected to mobilise AZN 5.9 billion total investment, including AZN 2.2 billion in state support and AZN 3.7 billion from the private sector, including foreign investment and technology partnerships. The Program focuses on making agriculture more productive, modern and competitive. It gives priority to better use of land and water resources,

²⁶ State Tax Service of the Republic of Azerbaijan: <https://taxes.gov.az/en/page/xarici-investisiyali-kommersiya-huquqi-sexsler-ucun> - last accessed: 24 August 2026

²⁷ State Tax Service of the Republic of Azerbaijan: <https://www.taxes.gov.az/en/page/erize-ve-arayis-formalari> - last accessed: 24 August 2026

²⁸ President of the Republic of Azerbaijan - State Program for the Development of Agricultural, Fisheries and Aquaculture Production and Processing Sectors for 2026 - 2030: <https://president.az/az/articles/view/72533> - last accessed: 10 August 2026.

expansion of modern irrigation systems, development of intensive farming, livestock, fisheries and aquaculture, improvement of processing and cold-chain infrastructure, wider use of digital technologies, and stronger support for farmers.

Opportunities

N	Area	Main point
1	Import substitution and food security	Domestic production can replace part of the imports of wheat, legumes, potatoes, beef, poultry, milk, fish, vegetable oils and butter, <i>creating opportunities in farming, productivity and processing.</i>
2	High-value horticulture	The Government plans to establish an additional 20,000 hectares of intensive orchards, <i>creating demand for planting materials, irrigation, crop management, storage, grading, packaging and export logistics.</i>
3	Greenhouse development	Greenhouse area is planned to increase from approximately 1,500 to 2,000 hectares, <i>creating opportunities in construction, modernization, climate control, irrigation, fertigation, seeds and technical services.</i>
4	Modern irrigation and water infrastructure	Modern irrigation coverage is expected to increase from approximately 130,000 to 300,000 hectares, supported by reservoirs, canals and <i>modern on-farm irrigation systems.</i>
5	Digital land management	Digital land “passports”, soil analysis, satellite monitoring, artificial intelligence and field research can improve crop selection, land use, subsidy targeting and investment planning.
6	Higher crop productivity	Grain yield is targeted to increase from around 3.2 to 5 tons per hectare and cotton yield from approximately 3.6 to 5 tons per hectare, <i>creating demand for seeds, machinery, irrigation and precision farming.</i>
7	Livestock, dairy and poultry modernization	The goal of full self-sufficiency in meat, milk and poultry <i>creates opportunities in genetics, artificial insemination, feed, veterinary services, dairy equipment, housing and farm management.</i>
8	Aquaculture development	Planned subsidies, incentives and fish-breeding facilities are expected to support a major increase in aquaculture production by 2030.
9	Processing and value addition	The Government seeks to expand domestic processing and move from raw-material exports toward higher-value food, textile and finished products.
10	Cold storage and logistics	Cold-storage capacity is planned to increase from approximately 400,000 to 500,000 tons, <i>creating opportunities in storage, packaging, refrigeration and transport.</i>
11	Fertilizer production and input security	Azerbaijan seeks to expand the range of locally available fertilizers through mixed-fertilizer production and more reliable import arrangements.
12	Flexible subsidies and stronger services	Subsidies may be reviewed more flexibly according to district, crop, domestic demand and export potential, while training, advisory services and agricultural insurance are expected to improve.

Challenges

No.	Area	Main point
1	Stagnating growth and low productivity	Recent agricultural growth has slowed, while a large share of land remains used for crops that generate relatively low value per hectare.
2	Dependence on imported food products	Self-sufficiency remains low or incomplete in wheat, legumes, vegetable oils, butter, beef, poultry, fish and several other products.
3	Water constraints and inefficient irrigation	Water losses, limited modern irrigation, drainage problems and uneven access to water continue to restrict productivity.
4	Climate and extreme-weather risks	Drought, floods, unusual rainfall and changing weather patterns increase uncertainty for production, water supply and rural incomes.
5	Low livestock productivity	Livestock numbers have declined, purebred cattle represent only a small share of the herd, and productivity on many family farms remains low.
6	Limited number of intensive farms	Intensive farms generate stronger productivity growth, but their expansion is constrained by finance, infrastructure, technology and management capacity.
7	Insufficient processing and cold-chain capacity	Additional investment is needed in processing, storage, packaging, refrigeration and logistics to reduce losses and support markets.
8	Dependence on imported inputs	Azerbaijan remains dependent on imported fertilizer types, seeds, feed components, machinery and technologies, making costs sensitive to global disruptions.
9	Need for more effective state support	Subsidies and concessional finance need to respond more closely to regional conditions, profitability, domestic demand and export opportunities.
10	Need to strengthen training and insurance	Farmer training, advisory services, awareness-raising and agricultural insurance need to be delivered at a more advanced and practical level.

4. Priority Areas for Dutch-Azerbaijani Agricultural Cooperation

The priority areas for Dutch - Azerbaijani agricultural cooperation are based on the strategic directions discussed between the Ministry of Agriculture of the Republic of Azerbaijan and the Embassy of the Kingdom of the Netherlands in February 2026, as well as the follow-up meetings, business discussions and networking activities held during Caspian Agro 2026. During these discussions, the Azerbaijani side emphasized the importance of cooperation with the Netherlands in agricultural innovation, technology transfer, investment and knowledge exchange. The Netherlands was highlighted as a relevant partner because of its strong international expertise in greenhouse horticulture, floriculture, seeds and planting materials, livestock genetics, and agricultural education.

The main priority areas identified for cooperation are:

1. **Greenhouse horticulture and cluster development**, including the proposed greenhouse industrial zone in Jabrayil and possible use of Dutch Westland experience
2. **Floriculture development**, particularly commercial flower production and greenhouse investment opportunities in Karabakh and other suitable regions
3. **Seeds and planting materials**, including access to high - quality hybrid seeds, and long-term supply partnerships
4. **Livestock genetics and dairy modernization**, including artificial insemination

5. **Agricultural education**, applied research including cooperation with Dutch knowledge institutions
6. **Trade and market access**, including support for Azerbaijani agricultural exports to the Netherlands and wider European markets.

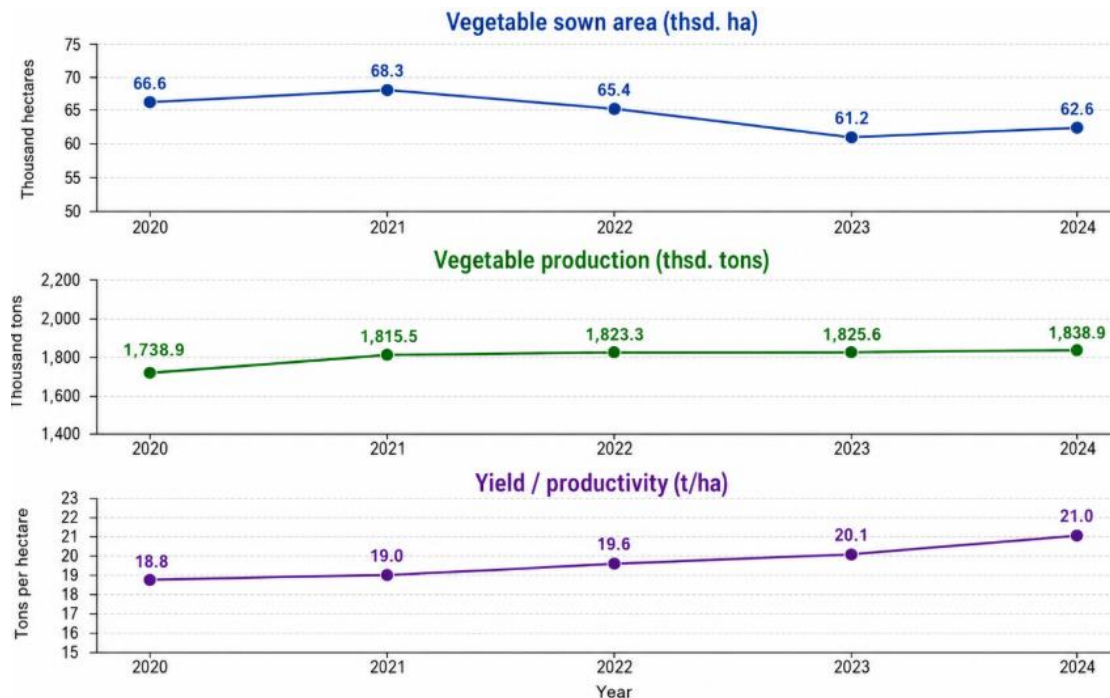
These priority areas form the basis for the following sections of the assessment. Each section examines one cooperation area separately, describing the **Sector** and **Dutch added value**.

4.1. Horticulture, Greenhouse Production and Floriculture

Horticulture, greenhouse production and floriculture are among the most relevant agricultural subsectors for cooperation between Azerbaijan and the Netherlands. These areas are directly linked to Azerbaijan's current priorities of increasing productivity, improving resource efficiency, expanding export-oriented production and introducing modern agricultural technologies.

Vegetable production remains an important part of Azerbaijan's crop sector and is geographically diversified across several economic regions. Key vegetable-producing areas include Gazakh-Tovuz, Karabakh, Lankaran-Astara, Guba-Khachmaz, Mil-Mughan, Central Aran and Shaki-Zagatala. The sector includes tomato, cucumber, onion, cabbage, pepper, eggplant, carrot, beetroot, garlic and other vegetable crops. According to the State Statistical Committee data used in this assessment, the sown area under vegetables decreased from 66,600.8 hectares in 2020 to 62,557.1 hectares in 2024, while total vegetable production increased from 1,738.9 thousand tonnes to 1,838.9 thousand tonnes.

Figure 1. Vegetable Production Trends in Azerbaijan, 2020–2024 (All farm categories)



Source: The Agriculture of Azerbaijan 2025, State Statistical Committee of the Republic of Azerbaijan.

Vegetables are produced through both open-field and greenhouse systems. Open-field production is spread across household, family-peasant and commercial farms and supplies mainly domestic wholesale markets, retailers, processors and, for selected products and seasons, export channels.

Greenhouse production is one of the most visible modernization areas in Azerbaijan's horticulture sector. The sector is strongly concentrated in tomatoes, which remain the dominant greenhouse crop and an important export product. In 2024, Azerbaijan produced 224,900 tonnes of greenhouse tomatoes, which was 16.4% lower than in the previous year. The number of greenhouses decreased from 3,228 in 2023 to 3,037 in 2024, while the total greenhouse area remained around 1,500-1,600 hectares. At the same time, greenhouse cucumber production increased from 10,400 tonnes to 11,600 tonnes²⁹. The decline in greenhouse tomato production does not mean that the sector has lost importance. Rather, it shows that producers are facing pressure related to production costs, energy efficiency, market competition, input prices, technology gaps and the need for better farm management. For commercial greenhouse producers, productivity, stable quality, energy-efficient systems, climate control, irrigation management, integrated pest management and export competitiveness are becoming increasingly important. Despite production pressure, greenhouse exports remain commercially important. In 2024, Azerbaijan exported 145,603.2 tonnes of tomatoes worth USD 175.43 million, compared with 140,588 tonnes worth USD 161.96 million in 2023. This means that export value increased even during a period of pressure on the production base. This shows that the sector has an export market, but also needs stronger productivity, cost efficiency, quality control, packaging and logistics.

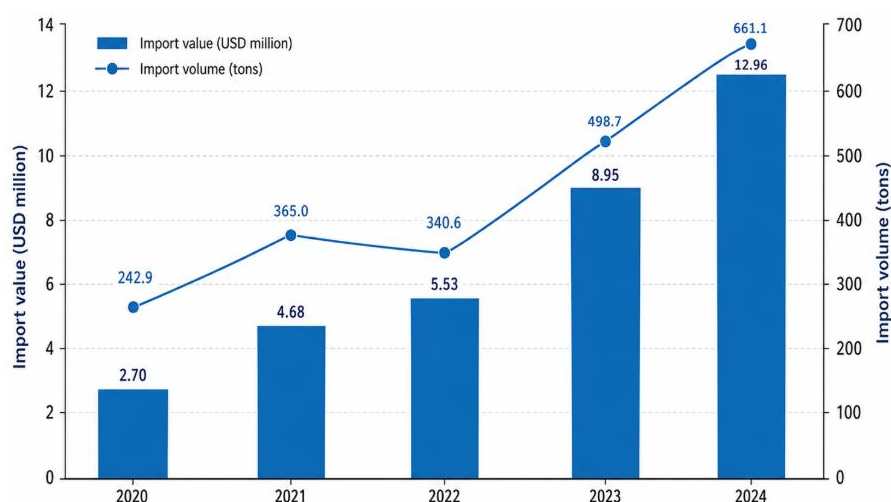
The Ministry of Agriculture has also expressed interest in developing a greenhouse industrial zone in Jabrayil, in the liberated territories, inspired by the Dutch Westland cluster model during the meeting held on 18 February 2026 between Mr. Majnun Mammadov, Minister of Agriculture of the Republic of Azerbaijan, and Ms. Marianne de Jong, Ambassador of the Kingdom of the Netherlands to Azerbaijan. This direction is important because it moves the discussion from individual greenhouse farms toward a cluster-based model, where production, logistics, services, training, input supply, technology providers and public-private coordination can be organized more efficiently. This creates a strong opportunity for Dutch knowledge transfer in greenhouse cluster governance, industrial zone management, technical service provision and integrated horticulture development.

Floriculture is another promising but still developing segment. Azerbaijan's fresh-cut flower market remains highly dependent on imports, which shows both domestic demand and potential space for local production. According to World Bank WITS data, Azerbaijan imported USD 12.96 million worth of fresh cut flowers and buds in 2024, equal to 661.1 tonnes. The main suppliers included Ecuador, Colombia, the Netherlands, Kenya and Italy. The Netherlands was among the leading suppliers, which confirms that Dutch floriculture products already have market relevance in Azerbaijan³⁰.

²⁹ Report News Agency :<https://report.az/en/business/azerbaijan-sees-16-decline-in-greenhouse-tomato-production/> - last accessed: 10 February 2026, AzerNews: <https://www.azernews.az/business/238466.html> - last accessed: 10 February 2026.

³⁰ World Bank - World Integrated Trade Solution (WITS): <https://wits.worldbank.org/trade/comtrade/en/country/AZE/year/2024/tradeflow/Imports/partner/ALL/product/060310> - last accessed: 12 February 2026.

Figure 2. Fresh Cut Flower Imports to Azerbaijan (HS 060310), 2020-2024



Source: World Bank WITS, HS 060310 (Fresh cut flowers and buds).

The import table shows a strong upward trend, with Azerbaijan's fresh cut flower imports rising from USD 2.7 million and 242.9 tonnes in 2020 to USD 12.96 million and 661.1 tonnes in 2024. At the same time, local modern floriculture production has already started to develop. A key example is AzRose LLC in Gabala. AzRose is a greenhouse based rose producer with an annual production capacity of around 6 million flowers. The project demonstrates that Azerbaijan can host modern flower production based on advanced greenhouse technologies³¹. The AzRose case is particularly relevant for Dutch-Azerbaijani cooperation because Dutch technology has already been used in the development of the greenhouse. Bosman Van Zaal describes the AzRose project as a modern rose production project in Gabala. The project includes advanced greenhouse systems such as climate control, irrigation, heating, screens, water systems and automation, showing that Dutch companies can provide not only equipment, but also integrated greenhouse solutions³².



Market-entry considerations in floriculture sector

Interviews with Dutch rose breeders and sector representatives during the assessment indicate that plant variety protection (PVP) and intellectual property enforcement remain important issues for the sector. Azerbaijan has been a member of UPOV since 2004 and has a legal framework for protecting new plant varieties. At the national level, the Agrarian Services Agency under the Ministry of Agriculture is responsible for the registration and protection of breeding achievements, including new plant varieties, and therefore plays a key role in implementing Azerbaijan's plant variety protection system in line with UPOV principles.

³¹ AFI Group - AzRose LLC: <https://afigroup.az/en/companies/azrose-mmcc> - last accessed: 15 February 2026.

³² Bosman Van Zaal - AzRose Project in Azerbaijan: <https://www.bosmanvanzaal.com/projects/az-rose> - last accessed: 15 February 2026.

During the interview with Dutch companies the following steps were suggested to solve the issues on plant variety protection:

- i. creating a transparent registry of commercially grown protected varieties and right holders
- ii. requiring growers to declare protected varieties used in commercial production and register license agreements
- iii. introducing a temporary regularization window allowing existing growers to legalize current plantings and conclude royalty arrangements and
- iv. strengthening institutional capacity for DUS testing, application management and dispute handling through a more centralized and digitalized PVP system.

Improving practical protection of new varieties would not only support existing Dutch companies, but could also encourage more Dutch breeders to introduce new flower varieties and planting materials to the Azerbaijani market.

Dutch Added Value to Horticulture, Greenhouse Sector and Floriculture

Dutch companies can add value to Azerbaijan's horticulture and greenhouse sector through integrated solutions covering greenhouse construction, climate control, irrigation and fertigation, lighting, automation, growing systems and post-harvest management. These technologies are particularly relevant for improving productivity, product quality, water and energy efficiency, and year-round production.

Dutch technology is already used in Azerbaijan. **Prins Group**³³ has implemented two large tomato greenhouse projects in Baku of approximately 11.3 ha and 11 ha, supplying greenhouse structures, ventilation, screening and related systems. In floriculture, **Bosman Van Zaal**³⁴ technology was used in the AzRose greenhouse complex in Gabala, where irrigation, heating, ventilation, lighting and production systems were integrated into a commercial rose-production model.

Recent Dutch participation in Azerbaijan also shows continued commercial interest. At Caspian Agro 2026, companies such as **Prins Group**, **Signify**, **Dutch Lighting Innovations**, **TTA-ISO**, **Straathof Plants** and **Lily Company** presented technologies and products relevant to greenhouse construction, horticultural lighting, automation, young plants and floriculture.

Further cooperation could focus on complete greenhouse ecosystems rather than individual equipment sales. Relevant Dutch companies include **Hoogendoorn Growth Management**³⁵ for climate and process automation, **Lumiforte**³⁶ for greenhouse coatings and climate management, **Meteor Systems**³⁷ for growing systems and irrigation, and **Dutch Plantin**³⁸ for horticultural substrates. Their technologies could support more resource-efficient greenhouse production and help Azerbaijani growers improve yields, quality and production consistency.

In floriculture, cooperation could expand through Dutch planting materials, young plants, flower bulbs, greenhouse management, post-harvest handling and export-oriented production systems.

³³ <https://www.prinsgroup.com/en/projects/?location=middle-east> – last accessed: 25 August 2026

³⁴ <https://www.bosmanvanzaal.com/> - last accessed: 25 August 2026

³⁵ <https://www.hoogendoorn.com/> - last accessed: 25 August 2026

³⁶ <https://www.lumiforte.com/> - last accessed: 25 August 2026

³⁷ <https://www.meteorsystems.nl/> - last accessed: 25 August 2026

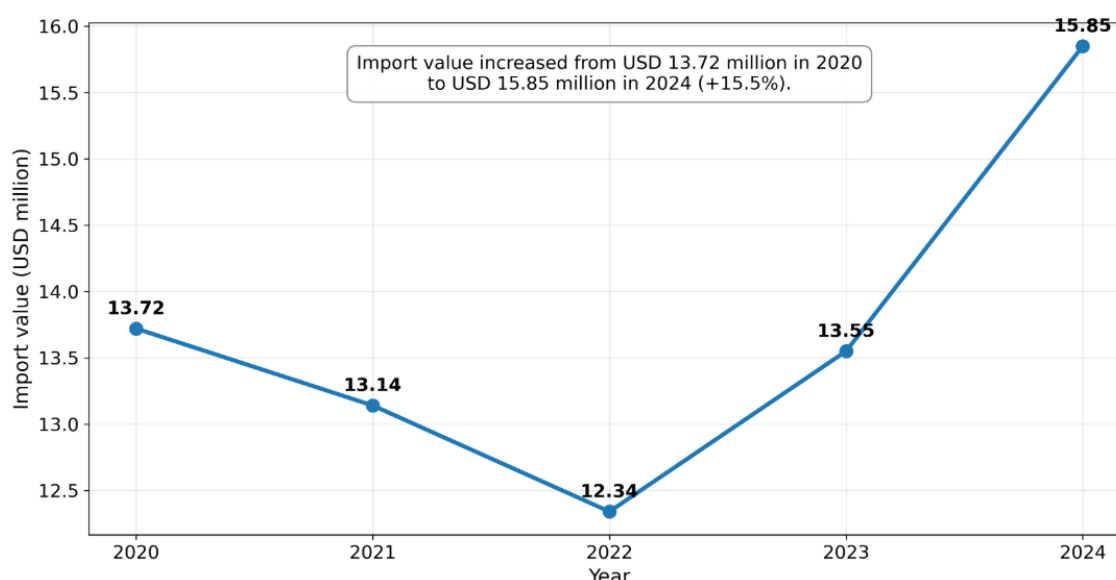
³⁸ <https://www.dutchplantin.com/> - last accessed: 25 August 2026

Dutch companies could also contribute through demonstration projects and practical grower training in climate control, irrigation scheduling, crop management, nutrition, disease prevention, post-harvest quality and export preparation.

4.2. Seeds, Planting Materials and Crop Productivity

Seeds and planting materials are one of the most important entry points for improving agricultural productivity in Azerbaijan. As the country's agricultural growth is expected to rely increasingly on productivity, resource efficiency and value chain modernization, access to high quality seeds, disease resistant varieties, certified planting materials and locally tested varieties becomes a strategic issue for both open-field and greenhouse production. This is especially relevant for vegetables, potatoes, fruits, berries, fodder crops and greenhouse crops, where productivity depends strongly on variety performance, seed quality, irrigation efficiency and farm management³⁹. Azerbaijan's vegetable seed market remains highly import oriented, especially for high value hybrid and elite seeds used in commercial vegetable production.

Figure 3. Azerbaijan Vegetable Seed Imports (HS 120991), 2020-2024⁴⁰



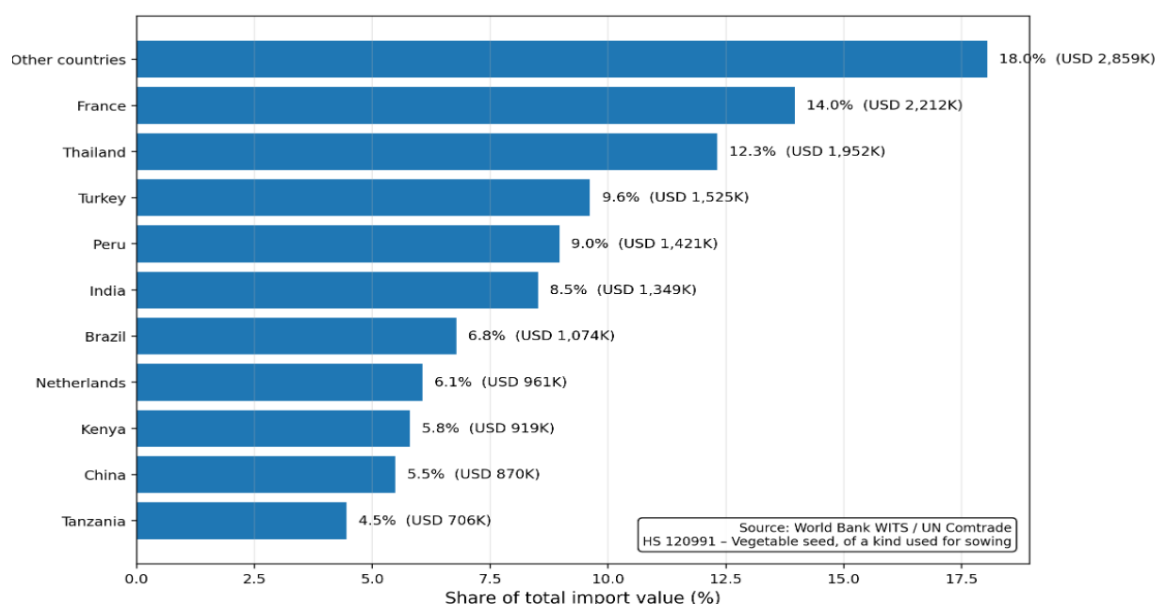
Source: World Bank - World Integrated Trade Solution (WITS), Azerbaijan Vegetable Seed Imports (HS 120991).

The above chart indicates that Azerbaijan's vegetable seed imports under HS 120991 fluctuated during 2020-2024, declining from USD 13.72 million in 2020 to USD 12.34 million in 2022, before recovering to USD 13.55 million in 2023 and reaching USD 15.85 million in 2024. Overall, import value increased by USD 2.12 million, or approximately 15.5%, between 2020 and 2024. The supplier structure is diversified, with Azerbaijan importing vegetable seeds from countries such as France, Thailand, Türkiye, Peru, India, Brazil, Chile, China and the Netherlands. France became the largest supplier by value in 2024, while Thailand and Türkiye have been consistently present among major suppliers.

³⁹ Presidential Administration of the Republic of Azerbaijan: <https://president.az/en/articles/view/72507> - last accessed: 20 February 2026.

⁴⁰ World Bank - World Integrated Trade Solution (WITS): <https://wits.worldbank.org/trade/comtrade/en/country/AZE/year/2024/tradeflow/Imports/partner/ALL/product/120991> - last accessed: 15 February 2026.

Figure 4. Azerbaijan Vegetable Seed Imports by Supplier Country, 2024



Source: World Bank - World Integrated Trade Solution (WITS).

The importance of improved seeds is also visible in vegetable production trends. During 2020-2024, Azerbaijan's vegetable sown area declined from 66,600.8 hectares to 62,557.1 hectares, while total vegetable production increased from 1,738.9 thousand tonnes to 1,838.9 thousand tonnes. Average yield increased from 18.8 tonnes/ha to 21 tonnes/ha. This means that the sector became more productive even with less cultivated area, confirming the importance of intensification, improved varieties, irrigation efficiency, greenhouse development and better farm level practices⁴¹. The seed issue is also directly linked to food security. Azerbaijan has stronger production capacity in vegetables, fruits, melons and berries, but remains dependent on imports for some strategic food products, especially wheat. The recent agricultural policy discussion (25 May 2026) emphasized that future development should focus on crop suitability, productivity, digital land mapping, soil analysis, crop zoning, land passports and better farm level decision-making. Better seeds and planting materials are therefore not only a commercial input, but also part of the country's productivity and food security agenda⁴². Simultaneously, the Ministry of Agriculture identified seeds and planting materials as one of the priority areas for cooperation with the Netherlands during the 18 February 2026 meeting between the Minister of Agriculture of Azerbaijan and the Ambassador of the Kingdom of the Netherlands. The Azerbaijani side expressed interest in expanding cooperation with Dutch seed companies, increasing supplier diversity, improving access to high-quality hybrid seeds and strengthening long-term seed supply relations and varietal development.

The major issues in the sector are as follows:

- high dependence on imported hybrid and elite vegetable seeds, with limited local commercial production.

⁴¹ State Statistical Committee of the Republic of Azerbaijan - Agriculture Statistics: <https://www.stat.gov.az/source/agriculture/> - last accessed: 25 February 2026.

⁴² Presidential Administration of the Republic of Azerbaijan: <https://president.az/en/articles/view/72507> - last accessed: 25 June 2026.

- farmers need stronger practical knowledge on irrigation, soil preparation, fertilization, pest management and correct seed use.
- seed supply should be supported by demonstration plots, technical guidance, farmer training and local performance monitoring.

Market entry considerations in seed sector

During the assessment process stakeholder consultations identified two practical issues that can affect the introduction of new seed varieties into Azerbaijan. The first is the registration and testing period for new varieties, particularly hybrid vegetables. At present, some varieties may require two to three years of testing before registration. While testing is important to confirm quality and suitability under local conditions, a long process can delay access to new hybrid varieties in a market where breeding and technology change quickly. During consultations for this assessment, representatives of the Agrarian Services Agency indicated that the authorities are considering measures that could shorten the testing period for vegetable hybrids, potentially to one year. If introduced, this could facilitate the entry of new varieties into the Azerbaijani market and allow Dutch breeders to conduct local trials more quickly.

A second issue raised by seed companies concerns laboratory and phytosanitary checks on imported certified seeds. Companies noted that seeds already carrying recognised international or European certification may still undergo additional testing when entering Azerbaijan, which can add time and cost. These controls remain important for protecting the country from plant pests and diseases, the opportunity is therefore to make the process more efficient rather than to remove controls. The Azerbaijan Food Safety Agency (AFSA) is responsible for plant-health and phytosanitary controls, while its laboratory system carries out testing for harmful organisms in plant and planting materials. Further technical dialogue between AFSA, the Agrarian Services Agency and Dutch seed companies could explore greater use of risk-based procedures and internationally recognised documentation while maintaining Azerbaijan's phytosanitary requirements.

Dutch Added Value in Seeds, Planting Materials and Crop Productivity

Dutch seed and planting material companies can add value to Azerbaijan through advanced breeding, disease-resistant varieties, greenhouse-adapted seeds, high-quality young plants and technical support. Their contribution goes beyond seed supply by combining genetics with higher productivity, efficient use of water and inputs, and practical crop-management knowledge.

Rijk Zwaan⁴³ can support vegetable production through advanced breeding for crops such as tomato, cucumber, pepper and other horticultural crops. **Enza Zaden**⁴⁴ offers vegetable genetics for both greenhouse and open-field production, with strong emphasis on yield, quality and disease resistance. **Bejo Zaden**⁴⁵ is particularly relevant for open-field vegetables, including onion, carrot and brassicas, and provides varieties adapted to different climatic and market conditions.

⁴³ <https://www.rijkszwaan.com/> - last accessed: 24 August 2026

⁴⁴ <https://www.enzazaden.com/> - last accessed: 24 August 2026

⁴⁵ <https://www.bejo.com/> - last accessed: 24 August 2026

De Ruiter⁴⁶ - Vegetables by Bayer is relevant to protected cultivation, especially greenhouse tomato, cucumber, pepper, aubergine and rootstocks. **Hazera**⁴⁷ could contribute a broad portfolio of vegetable varieties adapted to different production environments.

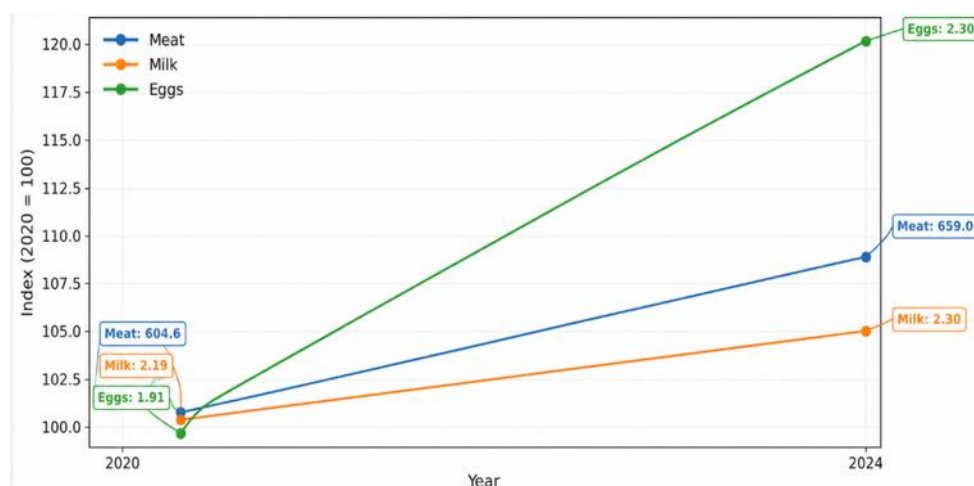
Axia Vegetable Seeds⁴⁸ and **Eminent Seeds**⁴⁹ are particularly relevant for high-value greenhouse crops such as tomatoes and peppers. For planting materials, **Beekenkamp Plants**⁵⁰ and **Straathof Young Plants**⁵¹ could contribute high-quality young plants, propagation materials and nursery expertise.

Dutch cooperation could therefore include not only commercial supply, but also local variety trials, demonstration plots, nursery development, disease-resistance testing and grower training, helping identify varieties and planting materials best suited to Azerbaijan's climatic conditions and market demand.

4.3. Livestock, Dairy and Poultry Development

Livestock, dairy and poultry are central to Azerbaijan's food security, rural livelihoods and agricultural modernization agenda. The sector is important not only because of meat, milk and egg production, but also because many small and medium farms depend on livestock as a regular source of income. At the national policy level, livestock productivity has become a priority as during the agricultural meeting chaired by President Ilham Aliyev on 25 May 2026, the President emphasized that Azerbaijan should achieve full self-sufficiency in meat, milk and poultry products⁵². Production indicators show a relatively stable but slow-growing livestock sector. Azerbaijan produced total 659,000 tonnes of meat in live weight (comprised of 272,000 tonnes of beef, 200,400 tonnes of poultry meat, 185,900 tonnes of mutton and goat meat, and 700 tonnes of pork), 2.29 million tonnes of milk and 2.3 billion eggs in 2024. Egg production has therefore shown stronger momentum than milk, while milk growth remains modest and requires productivity oriented modernization.

Figure 5. Livestock output trends: 2020-2024⁵³



Source: State Statistical Committee of the Republic of Azerbaijan - The Agriculture of Azerbaijan 2025.

⁴⁶ <https://www.vegetables.bayer.com/> - last accessed: 24 August 2026

⁴⁷ <https://www.hazera.com/> - last accessed: 24 August 2026

⁴⁸ <https://www.axiaseeds.com/> - last accessed: 24 August 2026

⁴⁹ <https://www.eminentseeds.nl/> - last accessed: 24 August 2026

⁵⁰ <https://www.beekenkamp.nl/> - last accessed: 24 August 2026

⁵¹ <https://www.straathofplants.com/> - last accessed: 24 August 2026

⁵² APA - Azerbaijan Press Agency: <https://president.az/en/articles/view/72507> <https://en.apa.az/official-news/azerbaijani-president-we-must-achieve-100-percent-self-sufficiency-in-meat-milk-and-poultry-508457> - last accessed: 2 June 2026.

⁵³ State Statistical Committee of the Republic of Azerbaijan - The Agriculture of Azerbaijan 2025:

https://www.stat.gov.az/menu/6/statistical_yearbooks/source/agriculture_2025.pdf - last accessed: 09 August 2026.

Livestock numbers have declined in recent years, which indicates a structural shift from herd expansion toward productivity improvement. According to the assessment data based on State Statistical Committee figures, cattle and buffalo numbers decreased from about 2.65 million heads in 2020 to about 2.47 million heads in 2024, while sheep and goat numbers declined from about 8.09 million heads to about 6.90 million heads during the same period. This trend suggests that keeping larger herds is becoming more difficult because of feed costs, pasture pressure, water limitations and animal health challenges⁵⁴.

At the same time, milk production increased from around 2.19 million tonnes in 2020 to around 2.30 million tonnes in 2024. This is a positive sign, but the growth is modest and does not fully solve the productivity gap. The key issue for the dairy sector is not only total milk volume, but also milk yield per cow, milk quality, hygiene, cooling, collection, traceability and reliable supply to processors.

According to field diagnostics and farmer interviews conducted by the Agrarian Research Center, Azerbaijan's cattle sector remains highly fragmented and dominated by small-scale household production systems. The survey findings indicate that approximately 46.7% of cattle farms keep only 1 - 4 animals, while farms with more than 21 animals represent only around 6% of total farms, despite accounting for approximately 36% of the total number of animals. These findings suggest that although larger commercial farms are gradually emerging, the sector overall remains dominated by smallholder production systems. The diagnostics also indicate that around 74% of milking animals consist of local mixed breeds, while higher-productivity European-origin breeds remain limited in number. At the same time, the survey demonstrates significant milk productivity differences between breed categories.

Breed category	Daily productivity
European-origin pure breeds	15.38 liters/day
Russian-origin breeds	11.54 liters/day
Artificial insemination animals	10.43 liters/day
Local mixed ("cır") animals	5.22 liters/day
Buffalo	4.37 liters/day
All cows average	6.57 liters/day

Due to the Agrarian Research Center livestock diagnostics, approximately 97% of surveyed farms continue to rely on manual milking practices, indicating a low level of mechanization within the dairy sector and the actual daily feed intake among surveyed farms averages approximately 6.7 kg feed, compared to a recommended standard level of around 8.1 kg feed. This suggests possible nutritional gaps, underfeeding risks, and limitations in access to balanced and high-quality feed resources, which may negatively affect animal productivity, health, and reproductive performance. Approximately 51.2% of surveyed farms reported selling meat animals directly through traders or butchers purchasing animals at the farm gate. This indicates that livestock market channels remain largely intermediary-driven. Due to the same diagnostics, livestock farms in Azerbaijan generate approximately 6.2 million tonnes of manure annually, the majority of which is utilized within farms themselves. This indicates that livestock waste already plays an important role in on-farm nutrient recycling and may create additional opportunities for the development of circular agriculture practices, organic fertilizer systems, and integrated crop-livestock production models.

Artificial Insemination: Azerbaijan has a system of livestock research and breeding support aimed at improving animal productivity and genetics. The Republican Artificial Insemination

⁵⁴ State Statistical Committee of the Republic of Azerbaijan - Agriculture Statistics: <https://www.stat.gov.az/source/agriculture/> last accessed: 10 March 2026.

Centre in Goygol region is the main facility focusing on artificial insemination services for cattle, providing farmers with access to genetic material (semen) and breeding support. The centre includes laboratory services, stables, feed storage, a veterinary clinic, and quarantine facilities, and has historically hosted training for insemination specialists to expand skilled services across regions. Under state programs, farmers can use insemination services through certified specialists who record animal and calf data in the national livestock information system, and subsidies (see Annex 3) are provided for each healthy calf obtained through artificial insemination to encourage improved breeding and genetic quality.

Poultry sector

Based on official statistics during 2020 - 2024⁵⁵, Azerbaijan's poultry sector demonstrated moderate overall decline, combined with noticeable year-to-year volatility. The total poultry stock decreased from 30.18 million heads in 2020 to 29.29 million heads in 2024, representing a reduction of approximately 885 thousand heads, or 2.9%. The most significant annual decline occurred in 2023, when the national poultry stock fell by around 1.10 million heads compared with the previous year. However, in 2024 the sector partially recovered, increasing by about 592 thousand heads, which indicates that production capacity and market demand remain resilient.

Year	Poultry, heads	Annual change
2020	30,175,812	-
2021	29,623,866	-551,946
2022	29,794,854	+170,988
2023	28,698,256	-1,096,598
2024	29,290,322	+592,066

The poultry sector remained geographically concentrated in several major production zones. In 2024, the largest poultry stocks were recorded in Shirvan-Salyan, Absheron-Khizi, Mil-Mughan, Guba-Khachmaz, Central Aran, Lankaran-Astara, Karabakh, and Gazakh-Tovuz economic regions. Shirvan-Salyan became the leading poultry region, accounting for approximately 18.4% of the national poultry stock, mainly due to the very large poultry population in Hajigabul district. Absheron-Khizi also remained a strategic poultry production area because of its proximity to Baku and the presence of large poultry stocks in Khizi and Absheron districts. Generally, the poultry sector remains one of the most commercially important livestock subsectors in Azerbaijan, contributing to affordable protein supply, food security, and agro-processing. Although the national poultry stock remained below its 2020 level in 2024, the partial recovery observed in the final year confirms the sector's resilience.

Egg production

For the last five years, egg production in Azerbaijan has generally increased, reaching 2.3 billion eggs in 2024, the highest level in the reviewed period. According to the State Statistical Committee, national egg production increased from 1.84 billion eggs in 2021 to 2.30 billion eggs in 2024. The strongest annual recovery was recorded in 2022, when production increased by about 9.8%, followed by continued growth of 8.4% in 2023 and 5.1% in 2024. Egg production is highly concentrated in several economic regions. In 2024, Absheron-Khizi, Shirvan-Salyan and Mil-Mughan together produced about 1.45 billion eggs, or nearly 63% of national

⁵⁵ State Statistical Committee of the Republic of Azerbaijan - Agriculture Statistics, Table 2.276 (Excel): [2.276en.xls](https://www.stat.gov.az/) - <https://www.stat.gov.az/> - last accessed: 12 March 2026.

production. The main production districts were Khizi, Hajigabul and Sabirabad, which together accounted for about half of total egg output. This concentration reflects the presence of large commercial poultry farms, access to feed and energy infrastructure, and good logistics links to Baku and export routes. In 2025, Azerbaijan's egg sector also became more export-oriented. Reported data indicate that the country exported over 100 million eggs during the year, including both table eggs and breeding eggs. A notable development was the start of table egg exports to the United States in March 2025. Gilazi Poultry met the required U.S. certification standards and received permission to begin regular shipments to the U.S. market. The company also provides a practical example of Dutch technology already being used in Azerbaijan's poultry sector. According to information provided for this assessment, Gilazi Poultry uses egg-grading and packing equipment from the Dutch company Moba, including the Omnia FT250 and Omnia FT330 models. Moba's Omnia FT systems are designed for automated egg grading and packing with a strong focus on hygiene and food safety. The FT250 can handle up to 90,000 eggs per hour, while the FT330 can handle up to 120,000 eggs per hour. This cooperation shows how Dutch equipment and technology can support the modernization of Azerbaijan's poultry industry, improve product handling and quality control, and strengthen the capacity of local producers to serve more demanding export markets.

Year	Production (billion)	Growth rate vs previous year	Trend comment
2020	1.91	-	Base year
2021	1.84	-3.66%	Slight decline (effects of pandemic & feed prices)
2022	2.02	+9.75%	Recovery as conditions improved
2023	2.19	+8.42%	Strong growth from industrial farms
2024	2.30	+5.15%	Record production, continued expansion

The main issues in the entire livestock, dairy and poultry sector are as following:

- improved livestock genetics through bovine semen, artificial insemination, embryo transfer and structured breeding programmes.
- better veterinary coverage, specialised livestock and poultry expertise, and stronger disease-surveillance systems.
- improved quality, storage and distribution of veterinary medicines and vaccines, including reliable cold-chain management.
- clearer farmer guidance on vaccination schedules, biosecurity and preventive animal-health practices.
- greater access to technical training, farm advisory services and after-sales support for livestock producers.

Dutch Added Value in Livestock, Dairy and Poultry sector

Azerbaijan's livestock, dairy and poultry sectors offer opportunities for Dutch technology and expertise because productivity, genetics, farm management, animal health and processing efficiency still have room to improve. In 2024, Azerbaijan's self-sufficiency stood at 83.4% for total meat, 76.6% for poultry meat and 83.9% for milk and dairy products, while egg self-sufficiency reached 103.7%⁵⁶. These figures indicate particular potential in dairy and poultry-meat productivity, breeding, feed efficiency, farm technology and value-chain modernization. Dutch company **CRV**⁵⁷ already has a formal market presence in Azerbaijan through Improvet LLC, which CRV lists as its official Azerbaijani distributor. CRV can contribute cattle genetics, genomic selection, breeding programmes and herd improvement aimed at higher milk production, fertility, longevity and animal health. **UNIFORM-Agri**⁵⁸ offers herd-management software for dairy and beef farms, including fertility, production and animal-performance monitoring, and can complement genetics by helping farms use herd data more effectively. **Globifield Impex B.V.**⁵⁹ is relevant for the supply of live breeding cattle. The company participated in the Netherlands Pavilion at Caspian Agro 2025 and 2026, demonstrating continued interest in the Azerbaijani market. Azerbaijan also imported 61 pure-bred breeding cattle from the Netherlands in 2024, valued at approximately USD 213,100⁶⁰, confirming an existing commercial link in breeding livestock.

Dutch companies could add further value through *automated milking and feeding, herd monitoring, milk cooling, barn design, manure management and farm digitalization*. **Lely**⁶¹ is particularly relevant for robotic milking, automated feeding and dairy-farm management, while **Nedap Livestock Management**⁶² could contribute animal identification, activity, health and reproductive monitoring. **Royal GD**⁶³ could support herd-health programmes, diagnostics, disease prevention and veterinary capacity building. Dutch involvement would be most effective when equipment is combined with farm design, training and reliable local after-sales service. In poultry, Dutch value can extend from farm production to egg handling and processing. **Vencomatic Group**⁶⁴ can contribute poultry housing, nesting, climate and manure-management systems, while **Moba**⁶⁵ specialises in automated egg handling, grading, packing and processing systems. Moba technology can improve labour efficiency, egg quality, hygiene and processing capacity. **Meyn**⁶⁶ is relevant for poultry slaughtering and processing technologies, particularly where Azerbaijani producers seek greater processing efficiency and higher food-safety standards.

5. Water Management and Climate-Smart Agriculture

Water management is one of the most critical issues for the future development of Azerbaijan's agricultural sector. Agriculture is the largest water consuming sector in the country, while Azerbaijan's water availability is strongly affected by transboundary rivers, climate variability, irrigation infrastructure and regional water use patterns. Around 70% of Azerbaijan's water

⁵⁶ State Statistical Committee of the Republic of Azerbaijan https://www.stat.gov.az/source/food_balances/?lang=en - last accessed: 26 August 2026

⁵⁷ <https://crv4all.com/> - last accessed: 26 August 2026

⁵⁸ <https://www.uniform-agri.com/> - last accessed: 26 August 2026

⁵⁹ <https://www.globifield.com/> - last accessed: 26 August 2026

⁶⁰ World Bank:

<https://wits.worldbank.org/trade/comtrade/en/country/AZE/year/2024/tradeflow/Imports/partner/ALL/product/010210> - last accessed: 26 August 2026

⁶¹ <https://www.lely.com/> - last accessed: 26 August 2026

⁶² <https://www.nedap-livestockmanagement.com/> - last accessed: 26 August 2026

⁶³ <https://www.gdanimalhealth.com/> - last accessed: 26 August 2026

⁶⁴ <https://www.vencomaticgroup.com/> - last accessed: 26 August 2026

⁶⁵ <https://moba.net/> - last accessed: 26 August 2026

⁶⁶ <https://www.meyn.com/> - last accessed: 26 August 2026

resources originate outside the country, mainly through rivers such as the Kura and Araz, which makes agricultural production highly dependent on upstream water flows, seasonal conditions and regional water management⁶⁷. The current irrigation system in Azerbaijan still relies significantly on open canals, traditional water delivery methods and infrastructure that requires modernization. In many areas, water losses occur during transportation and field application because of outdated canals, leakage, weak measurement systems and low adoption of modern irrigation technologies. According to water sector analyses, Azerbaijan abstracts around 12-13 billion cubic meters of water annually, and around 4 billion cubic meters may be lost during transportation, which makes efficiency improvement a national priority⁶⁸.

The Government has clearly identified irrigation modernization as one of the main priorities for agricultural development. During the agricultural meeting chaired by President Ilham Aliyev on 25 May 2026, water management, irrigation, productivity and efficient resource use were presented as central issues for the next stage of agricultural development. Minister of Agriculture Majnun Mammadov stated that the area covered by modern irrigation systems is planned to increase from around 130,000 hectares to 300,000 hectares by 2030⁶⁹. This policy direction is also reflected in the newly approved State Program for 2026-2030 on the development of agricultural production and processing, fisheries and aquaculture. The program shows that Azerbaijan's agricultural policy is moving beyond primary production and is increasingly focused on productivity, processing, value chains, private investment, climate resilience and more efficient use of natural resources⁷⁰. Water management is also important for climate-smart agriculture. Azerbaijan's agriculture is exposed to drought, rising temperatures, irregular precipitation, soil salinization, erosion and pressure on river flows. These risks affect vegetables, fruits, fodder crops, livestock, pasture systems and greenhouse production. Therefore, climate-smart agriculture in Azerbaijan should be understood not only as environmental protection, but also as a practical productivity and food-security strategy.

The main issues in water management and climate smart agriculture are the followings:

- rehabilitation and modernisation of irrigation canals, reservoirs and water distribution networks
- replacement of high loss open delivery systems with more efficient canals, closed pipelines and controlled water distribution systems
- wider use of drip irrigation, sprinkler irrigation, fertigation and other water saving technologies at farm level
- water measurement, metering, monitoring and digital control systems to improve water accounting and allocation
- drainage, soil salinity management and land reclamation solutions in areas affected by salinisation and poor drainage
- soil-moisture sensors, weather stations, irrigation scheduling tools and farm-level advisory systems

⁶⁷ Presidential Administration of the Republic of Azerbaijan: <https://president.az/en/articles/view/72507> - last accessed: 15 March 2026, Institute for Development and Diplomacy (IDD):

https://idd.az/media/old/2023/04/07/summary_of_round_table_walsh-zamanbayova_7_april.pdf?v=1.1 - last accessed: 15 March 2026.

⁶⁸ OECD / EU4Environment -Water Resources and Environmental Data:

https://eu4waterdata.eu/images/pdf/library/OECD/EU4EnvWD_AZ_1.5_Water%20economics.pdf - last accessed: 15 March 2026.

⁶⁹ Presidential Administration of the Republic of Azerbaijan: <https://president.az/en/articles/view/72507> - last accessed: 15 March 2026, Report News Agency - <https://report.az/en/aic/azerbaijan-to-expand-modern-irrigation-coverage-to-300-000-hectares-by-2030/> - last accessed: 16 March 2026.

⁷⁰ Report News Agency - <https://report.az/en/aic/azerbaijan-approves-new-state-program-for-agricultural-sector-development-for-2026-2030> - Last accessed: 15 March 2026, APA - Azerbaijan Press Agency: <https://en.apa.az/official-news/azerbaijan-approves-new-state-program-for-development-of-agriculture-508454> - last accessed: 16 March 2026.

- climate-smart crop planning based on soil quality, water availability, salinity risk and expected profitability
- satellite monitoring, digital mapping and land “passport” systems to support better land and water-use decisions
- greenhouse water management systems, including closed-loop irrigation, water recycling, disinfection and precise fertigation control
- training for farmers, water-user groups and local specialists on efficient irrigation, maintenance and climate smart farm management
- stronger maintenance services, spare parts and after-sales support for irrigation and water monitoring equipment

Dutch Added Value in Water Management and Climate-Smart Agriculture

Water management is one of the most relevant areas for Dutch Azerbaijani cooperation. Azerbaijan faces increasing pressure from drought, declining water availability, irrigation losses and climate change, while agriculture remains highly dependent on irrigation. Dutch expertise is particularly relevant in integrated water management, irrigation efficiency, drainage, digital monitoring, water reuse and climate adaptation⁷¹.

In 2024, the Embassy of the Kingdom of the Netherlands, together with Aqualink Azerbaijan and Export Partner, organised Dutch water missions to Azerbaijan. This cooperation was followed by a comprehensive Study of the Water Sector in Azerbaijan, commissioned by the Embassy and prepared by Aqualink, which identifies key challenges and potential Dutch solutions. Dutch organisations involved in water-sector engagement have included **Royal HaskoningDHV**, **Nijhuis Saur Industries**, **Spaans Babcock**, **IHE Delft** and **Wageningen University & Research**.

At irrigation-system level, Dutch expertise could support canal rehabilitation, leakage reduction, improved water allocation, closed-pipeline systems, drainage, pumping and digital water monitoring. **Royal HaskoningDHV**⁷² can contribute water-system planning, hydraulic engineering and climate-resilience expertise, while **Spaans Babcock**⁷³ is relevant for pumping and water-control infrastructure.

At farm level, Dutch suppliers can support drip irrigation, fertigation, soil-moisture sensing, irrigation scheduling and automation. These technologies can help farmers use water more precisely and maintain production under increasing climate stress.

At greenhouse level, Dutch technologies can enable closed-loop irrigation, nutrient recycling, water disinfection and precise fertigation. Companies such as **Priva**⁷⁴, **Hoogendoorn Growth Management**⁷⁵ and **Meteor Systems**⁷⁶ are particularly relevant for integrating irrigation, climate and crop-management systems.

Future cooperation could combine infrastructure investment with farm-level technology, demonstration projects, digital water management and practical training. Dutch value would be strongest where technologies are adapted to Azerbaijani conditions and supported by local service providers.

6. Food Sector

Food demand: Azerbaijan has a stable domestic food market supported by a population of more than 10 million people, urban consumption growth and a large internal demand for staple and

⁷¹ <https://www.netherlandsandyou.nl/web/azerbaijan/themes/agriculture-water> - last accessed: 17 March 2026

⁷² <https://www.royalhaskoningdhv.com/> - last accessed: 4 August 2026

⁷³ <https://www.spaansbabcock.com/> - last accessed: 4 August 2026

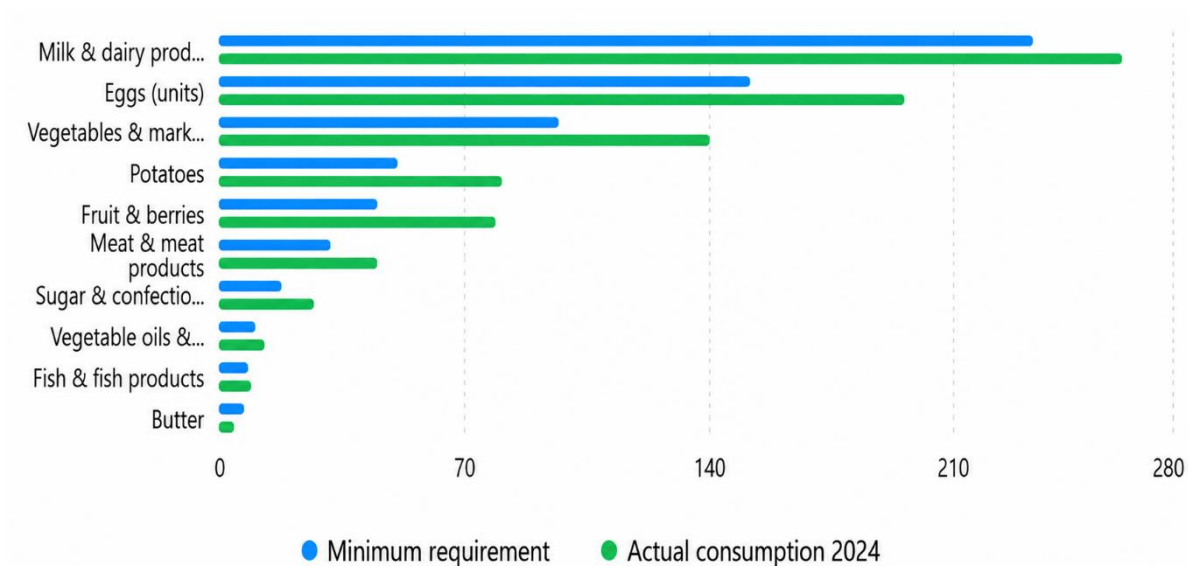
⁷⁴ <https://www.priva.com/> - last accessed: 4 August 2026

⁷⁵ <https://www.hoogendoorn.com/> - last accessed: 04 August 2026

⁷⁶ <https://www.meteorsystems.nl/> - last accessed: 04 August 2026

fresh food products. Food demand is especially strong in bread and flour products, potatoes, vegetables, fruits, meat, milk and dairy products, eggs, sugar, vegetable oils and butter. The official minimum consumption basket defines the basic annual food requirement per capita, while the food balance shows the actual food available for consumption during the year. The comparison of these two sources indicates that actual consumption is higher than the minimum required level for most main food groups, especially potatoes, vegetables, fruits, meat, milk and dairy products, and eggs.

Figure 6. Azerbaijan: Food Demand, 2024



Source: State Statistical Committee of the Republic of Azerbaijan, Food Balances of Azerbaijan 2024. Note: kg per capita per year, except eggs in units

Import: Azerbaijan's agrifood market combines growing domestic production with continued dependence on imports for several strategic food products. Major imported categories include wheat, vegetable oils, sugar, dairy products, fresh fruits, poultry meat, rice and processed foods. Between 2020 and 2024, the value of selected agricultural and food-related imports increased substantially, reflecting both import demand and higher international food prices⁷⁷.

Within this broader import market, the Netherlands is already an established supplier to Azerbaijan. Azerbaijan's imports from the Netherlands amounted to approximately USD 96.1 million in 2020, USD 87.7 million in 2021, USD 107.0 million in 2022, USD 113.0 million in 2023 and USD 98.8 million in 2024. In 2025, imports increased to approximately USD 122.5 million.

⁷⁷ State Statistical Committee of the Republic of Azerbaijan:
https://www.stat.gov.az/menu/6/statistical_yearbooks/source/f_trade_2025.pdf - last accessed: 24 August 2026

Table 1. Azerbaijan's Imports from the Netherlands, 2020–2025⁷⁸

Year	Imports
2020	USD 96.1 million
2021	USD 87.7 million
2022	USD 107.0 million
2023	USD 113.0 million
2024	USD 98.8 million
2025	122.5 million

Current trade also shows demand for Dutch food products. In 2024, Azerbaijan imported around USD 7.7 million of chocolate and cocoa preparations, USD 2.35 million of other food preparations, USD 0.82 million of cheese under HS 040690⁷⁹, and around USD 0.69 million of sweet biscuits, waffles and wafers from the Netherlands⁸⁰. These figures suggest that a market for Dutch branded and higher-value food products already exists, although it remains relatively small and has room to grow.

Consultations conducted during the assessment also indicate potential for expanding Dutch food products in Azerbaijan's modern retail sector. Discussions with Araz and Bravo supermarkets in Azerbaijan highlighted interest in products such as *Dutch cheese, butter, stroopwafels, waffles, cookies and other packaged foods* although successful market entry will depend on price competitiveness, import and logistics costs, shelf life, appropriate packaging, reliable local distribution and consumer positioning.

Export: Azerbaijan's agricultural and food exports increased overall during 2020–2024, led by horticultural products. Fresh fruit exports rose from approximately USD 349.9 million in 2020 to USD 484.8 million in 2024, while fresh vegetable exports remained significant but declined from around USD 219.9 million to USD 189.3 million over the same period. This confirms Azerbaijan's strong export base in fruits and vegetables, although export performance differs significantly by product⁸¹.

Agricultural and food exports from Azerbaijan to the Netherlands remain limited compared with total bilateral trade, but some market links already exist. In 2024, Azerbaijan exported approximately USD 170,000 of dried fruit to the Netherlands, corresponding to around 22.5 tonnes. In 2025, Dutch imports of edible fruits and nuts from Azerbaijan reached approximately USD 252,000, with dried fruit representing the main category⁸².

The Dutch market therefore remains largely underdeveloped for Azerbaijani agrifood exports. The most realistic opportunities are products where Azerbaijan already has a strong production or export base and where transport and shelf-life constraints can be managed. These include *dried fruits, hazelnuts, pomegranate products, persimmons and selected processed fruit products*. Hazelnuts are particularly relevant because Azerbaijan is already a significant supplier to the EU market. EU imports of shelled hazelnuts from Azerbaijan reached approximately USD 42.6

⁷⁸ Azerbaijan Foreign Trade: https://www.stat.gov.az/menu/6/statistical_yearbooks/source/f_trade_2025.pdf - last accessed: 12 August 2026.

⁷⁹ World Bank-WITS:

<https://wits.worldbank.org/trade/comtrade/en/country/AZE/year/2024/tradeflow/Imports/partner/ALL/product/040690> - last accessed: 12 August 2026.

⁸⁰ World Bank -WITS:

<https://wits.worldbank.org/trade/comtrade/en/country/AZE/year/2024/tradeflow/Imports/partner/ALL/product/1806> - last accessed: 12 August 2026.

⁸¹ State Statistical Committee of the Republic of Azerbaijan:

https://www.stat.gov.az/menu/6/statistical_yearbooks/source/f_trade_2025.pdf - last accessed: 6 August 2026

⁸² World Bank-WITS:

<https://wits.worldbank.org/trade/comtrade/en/country/AZE/year/2024/tradeflow/Exports/partner/ALL/product/081340> - last accessed: 24 August 2026

million in 2024⁸³. *Pomegranate juice, concentrate and other processed pomegranate products* may offer greater potential than fresh fruit because of longer shelf life, lower transport risk and suitability for food-processing and beverage markets. *Saffron and premium olive oil* could also be explored, but primarily as niche products rather than large-volume exports. Azerbaijan's total exports of olive oil excluding virgin olive oil were only about USD 0.83 million in 2024, while saffron exports were also very small, so these products should be treated as premium-market opportunities rather than major export categories⁸⁴.

7. Agricultural Education and Research

Azerbaijan has an established institutional base for agricultural education, research, advisory services and laboratory support. The main higher education institution in the sector is Azerbaijan State Agricultural University (ADAU) in Ganja, which provides education in agronomy, veterinary science, agricultural engineering, animal science, soil science, agricultural economics, agrotechnology, agribusiness and management. Other universities also contribute to food technology, food safety, public policy and management skills relevant to the agricultural and food sector. Agricultural education and research are also important areas for Azerbaijan Netherlands cooperation. This cooperation has a longer history. In 2017, Wageningen Economic Research and Delphy worked on the project "Master Plan for Promoting Investments in the Azerbaijan Agricultural Sector⁸⁵." As part of this work, Wageningen University & Research published a market and competitiveness analysis of Azerbaijan's agricultural sector, examining the structure and competitiveness of the sector and opportunities for further development and investment.

During Minister Majnun Mammadov's visit to the Netherlands in July 2024, the Azerbaijani delegation visited Wageningen University & Research (WUR), where discussions covered agricultural education, scientific research, greenhouse horticulture, plant breeding and seed technologies. The two sides also discussed expanding student and teacher exchanges and further institutional cooperation. There is also growing interest in research cooperation. In September 2025, the Agricultural Research Center (ARC) under the Ministry of Agriculture and WUR held discussions on possible joint research and knowledge exchange⁸⁶. The areas discussed included agricultural policy, climate change and agriculture, sustainable agriculture, food security, rural development, training needs, joint research projects and exchange of academic experience. A preliminary agreement was reached to further define possible areas for joint scientific research. This provides a good basis for developing stronger links between Azerbaijani agricultural research institutions and Dutch knowledge institutions. Against this background, the proposal discussed during the 18 February 2026 meeting with the Embassy of the Kingdom of the Netherlands to further develop cooperation between ADAU and WUR is particularly relevant. Future cooperation could include joint applied research, student and faculty exchanges, practical training, demonstration activities and, where appropriate, development of joint educational programmes. Such cooperation could help connect Azerbaijan's agricultural education and

⁸³ World Bank-WITS:

<https://wits.worldbank.org/trade/comtrade/en/country/EUN/year/2024/tradeflow/Imports/partner/ALL/product/080222> - last accessed: 24 August 2026

⁸⁴ World Bank-WITS:

<https://wits.worldbank.org/trade/comtrade/en/country/AZE/year/2024/tradeflow/Exports/partner/ALL/product/150990> - last accessed: 24 August 2026

⁸⁵ Wageningen University & Research - S. van Berkum (2017), Market and Competitiveness Analysis of the Azerbaijan Agricultural Sector: An Overview:

Full report: <https://research.wur.nl/en/publications/market-and-competitiveness-analysis-of-the-azerbaijan-agricultura/> / <https://edepot.wur.nl/450210> - last accessed: 12 August 2026.

⁸⁶ Agricultural Research Center of the Ministry of Agriculture - Cooperation Issues Discussed between Agricultural Research Center and Wageningen University, 25 September 2025: <https://atm.gov.az/en/news/2065/cooperation-issues-discussed-between-agricultural-/> - last accessed: 12 August 2026.

research system more closely with practical innovations in areas such as climate-smart agriculture, greenhouse production, water management, seed technologies and sustainable farming. On the research side, the Ministry of Agriculture has a broad network of institutions supporting agricultural research and services, including the Agricultural Research Center, Agrarian Innovation Center, Agro Services Agency, Agrarian Credit and Development Agency, Scientific Research Institute of Vegetable Growing, State Seed Fund, Republican Artificial Insemination Center and specialised crop, livestock and plant-protection research institutions. The Agricultural Research Center is also expanding cooperation with international research and knowledge institutions, with the renewed dialogue with WUR providing an important opportunity to strengthen links with the Dutch agricultural knowledge system.

8. Existing Cooperation Models and Success Stories

Existing cooperation between Azerbaijani agribusinesses and Dutch companies shows that the Netherlands is already a practical and trusted partner in Azerbaijan's agricultural modernization. These cooperation examples are not limited to simple product sales. They include greenhouse design, climate control, irrigation systems, plant nutrition, vegetable seeds, rose breeding, licensed planting material, livestock genetics, advisory support, farmer training and digital farm management tools. The main cooperation models can be grouped into five areas:

- integrated greenhouse technology
- floriculture and licensed plant material
- vegetable seed supply
- local adaptation trials, input supply and
- agronomic support, and livestock genetics.

These examples provide a useful foundation for expanding future cooperation with Dutch investors and technology providers.

AzRose: Dutch Greenhouse Technology and Licensed Rose Production

AzRose is one of the clearest examples of successful Dutch-Azerbaijani cooperation in floriculture. The company operates a modern flower greenhouse in Vandam settlement, Gabala district. According to company information and public sources, greenhouse development started in 2017, and the project was implemented in cooperation with the Dutch greenhouse technology company Bosman Van Zaal. The greenhouse applies modern automated systems for climate control, irrigation, lighting, heating, ventilation and production management. The cooperation model is important because it combines Dutch technology with Azerbaijani local production. Bosman Van Zaal built the turnkey greenhouse complex, while Dutch rose breeders supply high-quality planting material. According to the interview with AzRose management, around 95% of the rose varieties grown in the greenhouse are of Dutch origin. These varieties are officially purchased from well-known Dutch and international breeders, including De Ruiter, Jan Spek Rozen, United Selections, Schreurs, Dümme Orange and Interplant. The plants are used under licensing arrangements, and royalty payments are made for each planted seedling. The main benefit of this cooperation is stable, high-quality flower production. The company noted that Dutch planting material is delivered on time, the plants are healthy and disease-free, and the

supply chain is reliable. This allows the greenhouse to maintain continuous production without major interruptions. The project also demonstrates that Dutch companies can support Azerbaijan not only through the sale of equipment, but through integrated production systems combining technology, planting material, automation, know-how and long-term supply relations.

Plantlife: Greenhouse Technology, Irrigation and Knowledge Transfer Plantlife represents another practical cooperation model in Azerbaijan's greenhouse sector. The company works mainly in greenhouse production and provides technical services to greenhouse farms. It also supplies seeds and planting materials and operates its own greenhouse facilities. A large part of the technologies used in these greenhouse facilities are of Dutch origin. Dutch technologies are applied in several key components of the greenhouse system, including lighting, ventilation, climate control, irrigation, plant nutrition and fertigation.



The overall greenhouse system was linked to KG Systems, while the irrigation and management system was associated with Hoogendoorn. These systems help regulate the greenhouse environment more precisely, improve water and nutrient use, and support more stable and higher-quality production. The Plantlife case is important because it shows how Dutch technologies contribute to operational performance, not only infrastructure construction. Modern irrigation and climate management allow producers to use water, fertilizers and energy more efficiently. This is highly relevant for Azerbaijan because water scarcity, energy costs and productivity gaps are among the main constraints in greenhouse production. Plantlife uses seeds from companies such as Rijk Zwaan, Enza Zaden, Bejo Zaden, De Ruiter and Nunhems. These companies are known for high-yielding hybrid varieties of tomato, cucumber, pepper and other vegetable crops. The cooperation is positively evaluated because it has supported technology transfer, improved production efficiency and introduced modern agronomic practices into the greenhouse sector.

Grow Group Azerbaijan LLC

Grow Group Azerbaijan LLC has been operating since 2009 and is one of Azerbaijan's active companies in the modern greenhouse sector. The company works in greenhouse design, construction, equipment supply, management as well as provides agronomic consulting and vegetable production. Grow Group cooperates with several Dutch companies, including Lumiforte International B.V., Meteor Systems B.V., Dutch Plantin B.V.,



Koppert B.V. and WattsNext B.V. These partnerships cover important greenhouse technologies such as shading and coating products, irrigation systems, substrates, biological protection, pollination solutions and greenhouse lighting. Cooperation with Meteor Systems began in 2009, with Lumiforte in 2011 and with Dutch Plantin in 2013, while cooperation with Koppert and WattsNext started in 2025.

The Dutch technologies have been applied in Grow Group's greenhouse complexes in Baku and the Absheron region. The cooperation has included product supply, technical advice, product trials, agronomic support and training for local specialists. According to Grow Group, these partnerships have improved temperature management, reduced plant heat stress, increased crop quality and supported more efficient use of resources. The company reports an average productivity increase of around 10 -15% across different projects.

Syngenta: Integrated Input Supply and Local Testing

The Syngenta cooperation model in Azerbaijan is based on local partnership and market adaptation. Syngenta operates in Azerbaijan through cooperation with local partner. The main activities of this cooperation include import and marketing of vegetable seeds, import and wholesale sale of pesticides and fertilizers, organization of product registration, local trials and selection of varieties according to farmer demand. The company does not simply bring products to the market. New seeds are first tested under local soil, climate, solar radiation and disease-pressure conditions. Only products that perform effectively in Azerbaijan are later introduced commercially. The main crops tested include tomato for greenhouse and open-field production, cucumber, pepper, onion, cabbage, broccoli, cauliflower and other vegetables. This trial-based approach is valuable for farmers because it reduces the risk of introducing unsuitable varieties. It also helps ensure that hybrid seeds entering the market are adapted to local conditions and can deliver stable productivity. According to the interview, seed trials require at least a two-year registration and testing process. During this period, unregistered trial seeds may face high import duties and repeated laboratory analysis. The interview also noted that repeated PCR and GMO-related tests can increase product costs by 20 - 30% in some cases. These costs are ultimately reflected in farmer prices. For Dutch and international companies, simplifying trial procedures and recognizing international certificates could accelerate the introduction of new technologies and improve market competitiveness.

Rijk Zwaan: Long-Term Dutch Seed Presence in Azerbaijan

Rijk Zwaan is one of the strongest examples of long-term Dutch seed cooperation in Azerbaijan. According to information provided during consultations for this assessment, Rijk Zwaan has been active in Azerbaijan for more than 13 years and works mainly through a local distributor model. The company has an established presence in Azerbaijan's vegetable seed market. The company supplies high-quality vegetable seeds for different production systems, including modern greenhouses, agroparks, small and medium farms and open-field production. This is important because Azerbaijan's horticulture sector is diverse. Some producers operate high-tech greenhouses, while others work in open-field vegetable production or smaller commercial farms. Rijk Zwaan's model therefore responds to different levels of production capacity and technology

use. A key strength of this cooperation model is local testing. Before introducing new varieties, Rijk Zwaan assesses their performance under Azerbaijani conditions, including climate, water availability, disease pressure and production practices. This is especially important for disease-resistant varieties, including those resistant to ToBRFV and TYLCV, which can strongly affect tomato and vegetable production. The company's experience also highlights the importance of after-sales support. High-quality seeds can only deliver their full potential when farmers use proper agronomic practices. Therefore, technical advice, grower support and practical training are important parts of the cooperation model. For Dutch investors, this shows that Azerbaijan needs not only high-quality inputs, but also knowledge transfer, demonstration fields and advisory services.

Improvvet LLC: Livestock Genetics and Smart Breeding Cooperation

Cooperation between Improvet LLC and the Dutch companies CRV and UNIFORM-Agri demonstrates that Dutch-Azerbaijani cooperation is not limited to horticulture, but is also developing in livestock genetics, herd management and dairy-farm digitalization. Improvet has imported and distributed CRV bovine semen in Azerbaijan since late 2023. The cooperation expanded rapidly, from around 5,000 doses in 2023 to approximately 45,000 doses in 2024, indicating growing market demand for improved cattle genetics and artificial insemination. The CRV cooperation goes beyond the supply of genetic material and also includes advisory support and digital tools such as SireMatch, HerdOptimizer and Ovalert, which can support breeding decisions, herd monitoring and productivity improvement. CRV experts have also visited Azerbaijani farms and contributed to technical knowledge transfer. Improvet also cooperates with UNIFORM-Agri⁸⁷, a Dutch company specializing in herd-management software for dairy farming. UNIFORM-Agri's systems support day-to-day herd administration and provide farmers with tools to monitor production, fertility, animal health and key performance indicators.

AVC Agro / Trouw Nutrition Cooperation: Animal Nutrition and Feed Management

The local Azerbaijani company AVC Agro cooperates with Trouw Nutrition, the animal-nutrition business line of the Dutch company Nutreco. Trouw Nutrition specialises in *feed specialties, premixes, feed additives, nutritional models and technical services* for livestock and poultry. Trouw Nutrition officially considers Azerbaijan among its export markets, served through its Central and Southeast Europe export structure, with regional technical and commercial support for ruminant and poultry production. This cooperation is important because improvements in livestock and poultry productivity depend not only on genetics and farm equipment, but also on feed quality, balanced nutrition, feed efficiency, animal health and farm management.

⁸⁷ UNIFORM-Agri - Solutions for Dairy Cow Farmers: <https://www.uniform-agri.com/en/solutions/for-dairy-cow-farmers/> - last accessed: 13 August 2026.

Globifield Impex B.V.: Breeding Livestock Supply

Globifield Impex B.V. represents an established example of Dutch engagement with Azerbaijan in the livestock sector. The company specializes in the international supply of live breeding livestock and has participated in the Netherlands Pavilion at Caspian Agro in both 2025 and 2026, demonstrating its continued commitment to the Azerbaijani market. Globifield also cooperates with local partners in Azerbaijan in the livestock sector and has exported over 2,700 bovine breeding animals to Azerbaijan since 2023, with a total value of approximately EUR 10.7 million. This cooperation demonstrates the potential for continued bilateral business development and knowledge exchange in the livestock sector.

Main Lessons from Existing Cooperation

Existing Dutch Azerbaijani agricultural cooperation shows that the strongest partnerships are those that combine *technology, high-quality inputs, technical advice, local partners and long-term support* rather than focusing only on product sales. Current examples cover several parts of the agricultural value chain, including greenhouse production and floriculture, vegetable seeds, livestock genetics, animal nutrition and breeding livestock. Experience from companies such as Bosman Van Zaal, Prins Group, Rijk Zwaan, CRV, Trouw Nutrition/Nutreco and Globifield, together with Azerbaijani partners such as AzRose, Grow Group Azerbaijan, Improvet and AVC Agro, demonstrates the importance of having reliable local partners who understand the market, provide after-sales service and maintain contact with farmers and commercial producers.

9. Azerbaijan Agropark and the Westland Horticultural Cluster Models

Agroparks have become an important part of Azerbaijan's agricultural modernization. They bring together *agricultural production with services such as processing, storage, packaging and logistics* (see Annex 2). Most agroparks are involved in crop production, while others combine crops with livestock, horticulture, processing and logistics. Agroparks can also provide a practical entry point for cooperation with Dutch companies because they have the scale to introduce modern technologies and integrated production systems. Baku Agropark in Zira, for example, has used Dutch greenhouse technology, including cooperation with the Dutch greenhouse company **Debets Schalke**⁸⁸. There is also good potential to strengthen Azerbaijan's agropark model through cooperation with **Westland** in the Netherlands. Westland is based on a cluster approach in which *growers, greenhouse builders, seed companies, technology suppliers, processors, logistics companies, research institutions and government work closely together*. Its strength is not only agricultural production, but the connection of the whole value chain, from production and technology to processing, logistics, trade and knowledge.

⁸⁸ Debets Schalke - Westland Greenhouse of 11 Hectares Officially Opened in Azerbaijan:
<https://www.debetsschalke.com/en/press-releases/westland-greenhouse-of-11-hectares-officially-opened-in-azerbaijan>
- last accessed: 14 August 2026.



This experience could help Azerbaijan further develop agroparks from mainly production-oriented areas into more integrated agricultural clusters. Westland’s approach gives particular attention to cooperation between producers and suppliers, post-harvest and logistics, shared packaging and storage, innovation, knowledge and training, and more efficient use of energy and other resources. It also highlights the importance of strong coordination between government, business and knowledge institutions.

10. Azerbaijan-Netherlands Agricultural Demand and Supply Matrix

Azerbaijan’s agricultural modernization strategy aligns closely with the Netherlands’ strengths in high-technology horticulture, seed systems, water management, and livestock productivity. The matrix below links strategic agricultural priorities identified in Azerbaijan with relevant Dutch companies, technology providers and knowledge institutions.

Priority area	Azerbaijan market need	Companies participated in Caspian Agro 2026	Dutch companies proposed
Greenhouse construction and modernization	Modern, energy-efficient greenhouses, modernization of existing facilities and development of greenhouse clusters.	Prins Group	Bosman Van Zaal, KUBO Group, Dalsem, Certhon, Havecon
Greenhouse climate control, lighting and automation	Climate computers, sensors, automation, lighting, fertigation control and data-based crop management.	Dutch Lighting Innovations (DLI), Signify, TTA-ISO	Hoogendoorn Growth Management, Priva, Ridder, Blue Radix

Priority area	Azerbaijan market need	Companies participated in Caspian Agro 2026	Dutch companies proposed
Greenhouse growing systems and irrigation	Greenhouse irrigation, fertigation, hydroponics, smart coating solutions, growing gutters, crop-support systems and water recirculation.	Prins Group, TTA-ISO	Meteor Systems, Horti Projects Holland, Ridder, Priva, WattsNext B.V., Lumiforte International B.V.
Biological crop protection and pollination	Increasing need for biological and environmentally sustainable alternatives that improve soil health, nutrient-use efficiency, root development and crop resilience, while reducing dependence on conventional chemical inputs. Biological seed treatments, beneficial microorganisms and biostimulants can support healthier crops and more efficient nutrient uptake.	Syngenta B.V. (integrated crop solutions)	Koppert Biological Systems, Biobest Netherlands
Post harvest handling and agro-logistics	Sorting, grading, packaging, internal logistics and processing-line integration for vegetables, fruits and greenhouse products.	Export Partner (matchmaking and market-access support)	Viscon Group, Aweta, Greefa, Burg Machinery
Vegetable seeds and planting materials	High-yielding, disease resistant and market-oriented varieties for greenhouse and open field production.	Rijk Zwaan, Enza Zaden, Bejo, Syngenta B.V., De Ruiter	Hazera Seeds, Nunhems
Seed quality, certification and variety testing	Seed testing, plant health, varietal identity, DUS testing, certification and regulatory-system support.	Rijk Zwaan, Syngenta B.V.	Naktuinbouw Wageningen University & Research
Floriculture greenhouse production	Commercial flower production, modern rose and ornamental greenhouses, investment projects and cluster development.	Lily Company, Straathof Plants	Bosman Van Zaal, KUBO Group, Dalsem, Certhon, Havecon
Flower varieties, bulbs, young plants and propagation	Licensed varieties, bulbs, young plants, propagation material and breeder-rights-based production.	Lily Company, Straathof Plants	Dümmen Orange, Schreurs, Interplant Roses, Jan Spek Rozen, United Selections
Flower logistics and market access	Cold chain, flower handling, digital trade, auction knowledge and international market integration.	Export Partner	Royal FloraHolland
Water-efficient irrigation	Drip irrigation, fertigation, precision irrigation and efficient water use at farm and greenhouse level.	Prins Group (greenhouse systems), TTA-ISO (technical systems)	Meteor Systems, Horti Projects Holland, Holland Agri Machinery, Netafim Netherlands

Priority area	Azerbaijan market need	Companies participated in Caspian Agro 2026	Dutch companies proposed
Smart water management and water-loss reduction	Water accounting, leak detection, digital monitoring, drainage, reduction of losses and infrastructure efficiency.	-	Royal HaskoningDHV Vitens Witteveen+Bos Arcadis Netherlands Aalberts Integrated Piping Systems
Livestock genetics and artificial insemination	Improved cattle genetics, bovine semen, artificial insemination and structured breeding programmes.	CRV, Globifield	KI Samen, AI Total
Dairy farm modernization	Milking systems, herd monitoring, dairy automation, animal welfare and productivity improvement.	CRV, Globifield	UNIFORM-Agri, Lely, Nedap Livestock Management, GEA Netherlands, Royal GD
Feed efficiency and livestock nutrition	Feed formulation, ration optimization, feed efficiency, premixes and livestock nutrition advice.	-	ForFarmers, Trouw Nutrition, Agrifirm
Poultry systems and biosecurity	Modern poultry housing, ventilation, feeding, vaccination planning, disease prevention and processing.	-	Vencomatic Group, Moba, HatchTech, Marel Poultry
Agricultural education, applied research and knowledge transfer	Modern agricultural education, applied research, climate-smart agriculture, advisory services and demonstration farms.	-	Wageningen University & Research, Delphy, Aeres University of Applied Sciences, HAS Green Academy
Trade, investment promotion and matchmaking	Partner identification, market entry, B2B matchmaking, export development and investment facilitation.	Export Partner	Netherlands Enterprise Agency (RVO), Invest International, Rabobank, Atradius Dutch State Business

11. Trade Policy Framework, 2024 -2025

Azerbaijan's trade policy framework is shaped by its ongoing WTO accession process, bilateral and preferential trade agreements, and a relatively simple import tariff structure. For foreign agricultural and agribusiness companies, the most important practical point is that market access conditions depend strongly on the product's HS code, origin, applicable preferential regime, and any temporary customs exemptions or protective measures in force at the time of import.

WTO accession status

Azerbaijan applied to join the World Trade Organization in 1997 and is not yet a WTO member. The WTO Working Party on Azerbaijan's accession was established in 1997 and held its 16th meeting in September 2024, confirming that the accession process remains active. In 2025, Azerbaijan continued bilateral market access negotiations on goods and services with WTO

members. According to the Ministry of Economy⁸⁹, bilateral negotiations were held with China in January and June 2025, and negotiations with China on goods and services were concluded with agreement to sign a bilateral protocol. The Ministry also reports that expert-level negotiations with Thailand and Honduras have been completed, and further bilateral negotiations were conducted at the WTO Secretariat in July and December 2025. For investors, this means that Azerbaijan is gradually moving toward closer alignment with international trade rules, but WTO membership has not yet been completed. Therefore, companies should continue to rely on Azerbaijan's current national tariff regime, bilateral agreements, and sector-specific customs rules when assessing import costs and market entry conditions.

Trade relationship with the European Union and the Netherlands

Trade relations between Azerbaijan and the European Union are governed primarily by the EU Azerbaijan Partnership and Cooperation Agreement (PCA), which has been in force since 1 July 1999. The agreement provides a broad framework for political, economic, trade and investment cooperation. It is not a free trade agreement and does not provide preferential tariffs, although it eliminates quantitative restrictions on trade and supports approximation toward international and EU-related standards⁹⁰. Negotiations on a new comprehensive EU - Azerbaijan agreement were launched in February 2017 but the trade negotiations have been on hold since February 2022. Therefore, Dutch and other EU businesses entering Azerbaijan continue to operate largely under Azerbaijan's national customs, taxation, technical-regulation, food-safety, veterinary and phytosanitary requirements⁹¹. Alongside the EU framework, Azerbaijan and the Netherlands have developed a bilateral legal basis for economic cooperation. The Embassy of Azerbaijan in the Netherlands currently lists *11 bilateral agreements and memoranda*, including the 2002 Agreement on Mutual Administrative Assistance in Customs Matters, the 2002 Memorandum of Understanding on Economic Cooperation, the 2004 Agreement on International Road Transport, and the 2008 Convention on the Avoidance of Double Taxation⁹². A 2014 Memorandum of Understanding on water-management cooperation is also particularly relevant to agricultural and water-sector cooperation⁹³. In the livestock sector, bilateral trade is also supported by commodity-specific veterinary certification requirements. **Livestock trade** is also supported by an *approved bilateral veterinary certificate*⁹⁴ for bovine semen exported from the Netherlands to Azerbaijan. The certificate sets the animal-health, traceability, testing, collection, processing and storage requirements that Dutch bovine semen must meet before export to Azerbaijan. It requires collection from an EU-approved semen collection centre under veterinary supervision and compliance with relevant WOA animal-health standards.

The Convention on the Avoidance of Double Taxation was signed on 22 September 2008, entered into force on 18 December 2009, and has applied since 1 January 2010. It establishes rules for allocating taxing rights between the two countries and helps prevent the same income or capital from being taxed twice, which is important for companies and investors operating across both markets⁹⁵. The existing framework provides a useful basis for bilateral business, but opportunities remain to facilitate agricultural trade further. For agricultural cooperation, the most practical areas for further facilitation are likely to be *phytosanitary, seed and planting-material*

⁸⁹ Ministry of Economy of the Republic of Azerbaijan: <https://www.economy.gov.az/en/page/beynelxalq-elqeler/umumdunya-ticaret-teskilati-wto-ve-azerbaycan> - last accessed: 28 March, 2026.

⁹⁰ <https://www.consilium.europa.eu/en/documents/treaties-agreements/agreement/?DocLanguage=en&id=1996014> -last accessed: 04 June 2026

⁹¹ https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/countries-and-regions/azerbaijan_en - last accessed: 10 April 2026

⁹² [Embassy of the Republic of Azerbaijan to the Kingdom of the Netherlands](#) - last accessed: 20 August 2026

⁹³ Ministry of Foreign Affairs of the Republic of Azerbaijan: <https://thehague.mfa.gov.az/en/category/about-bilateral-relations> - last accessed: 20 August 2026

⁹⁴ See Annex 6: Veterinary Certificate for Bovine Semen Exported to the Republic of Azerbaijan.

⁹⁵ State Tax Service of the Republic of Azerbaijan: <https://taxes.gov.az/en/page/ikiqat-vergitutmanin-aradan-qaldirilmasina-dair-beynelxalq-sazisler> - 20 August 2026.

registration, recognition or alignment of certification requirements, food-safety documentation, customs procedures and digital exchange of regulatory information. Progress in these areas could reduce time and administrative costs for companies trading seeds, planting materials, breeding livestock, food products and agricultural technologies while maintaining national safety and quality requirements.

Free trade arrangements with CIS and former Soviet countries

Azerbaijan has not joined the 2011 CIS Free Trade Area Treaty. Instead, it has maintained a network of bilateral free trade agreements with several former Soviet countries. According to Azerbaijan's State Customs Committee, Azerbaijan has free trade agreements in force with countries including the Russian Federation, Moldova, Ukraine, Georgia, Kazakhstan, Uzbekistan, Turkmenistan, Kyrgyzstan, Belarus, and Tajikistan⁹⁶. These agreements generally allow qualifying goods to be traded without customs duties. However, preferential treatment is not automatic. Goods must normally meet rules of origin requirements and be supported by the relevant certificate of origin, commonly the ST-1 certificate for CIS trade. For companies, this means that origin documentation is essential. A product imported from an FTA partner may benefit from duty-free treatment only if it satisfies the required origin rules and customs documentation conditions.

Preferential trade agreements beyond the CIS region

Azerbaijan has also developed preferential trade relations beyond the CIS framework. A key example is the Azerbaijan - Türkiye Preferential Trade Agreement, which was signed on 25 February 2020 and entered into force on 1 March 2021⁹⁷. This agreement does not cover all products. Preferences apply only to selected goods listed by HS codes. Therefore, companies trading between Azerbaijan and Türkiye must check whether their specific product is included in the preferential product list. Azerbaijan has also moved to expand preferential trade relations with Pakistan. Publicly available information indicates that the Azerbaijan - Pakistan preferential trade agreement⁹⁸ was approved in 2024 and entered into force on 1 January 2025, applying tariff preferences to selected products identified by detailed HS codes. These agreements show that Azerbaijan is gradually diversifying its preferential trade network, although preferences remain product-specific rather than economy-wide.

Import tariff structure

Since 2018, Azerbaijan has applied a simplified three-tier import tariff structure. The State Customs Committee states that the country moved from a seven-step ad valorem customs duty system to a three-step structure of 0%, 5%, and 15%⁹⁹. In general, raw materials, machinery, equipment, and certain production inputs may fall under lower or zero customs duty rates, while many finished goods, including some consumer-ready food and agricultural products, are more likely to be subject to the higher 15% rate. However, the exact tariff depends on the product's HS code, not only on its general description. For agricultural investors, this is important because many inputs, machinery, irrigation systems, and technical equipment may benefit from low or zero customs duty, while finished food products may face higher tariff protection. Before importing any product, companies should verify the applicable HS code, customs duty, VAT treatment, certification requirements, and any temporary exemptions in force.

⁹⁶ State Customs Committee of the Republic of Azerbaijan: <https://customs.gov.az/en/sahibkarlar-ucun/serbesticaret> last accessed: 5 April 2026.

⁹⁷ Asian Development Bank - Asia Regional Integration Center (ARIC) :<https://aric.adb.org/fta/azerbaijan-turkiye-preferential-trade-agreement> last accessed: 5 April 2026.

⁹⁸ APA - Azerbaijan Press Agency :<https://en.apa.az/foreign-policy/azerbaijani-parliament-will-approve-the-preferential-trade-agreement-with-pakistan-450058> last accessed: 5 April 2026.

⁹⁹ State Customs Committee of the Republic of Azerbaijan: <https://customs.gov.az/en/faydali/gomruk-statistikasi/tariff-statistics> last accessed: 5 April 2026.

Product-specific protection and temporary exemptions

Azerbaijan's tariff policy also includes product-specific protective measures and temporary exemptions adopted by Cabinet of Ministers decisions. These measures may change over time and may apply to specific HS codes, product groups, or time periods. For example, customs duty exemptions or reduced duties have been applied to certain agricultural and food products, including selected livestock, poultry, butter, dairy-related products, vegetable seeds, yeast products, and other inputs. Some exemptions were extended for specific periods, including until the end of 2025 or beyond, depending on the product and the relevant Cabinet decision¹⁰⁰. This creates both opportunities and risks for companies. On the one hand, temporary exemptions can reduce import costs for agricultural inputs and food products. On the other hand, companies should not assume that exemptions are permanent. For investment planning and cost calculations, each product should be checked by HS code against the latest customs tariff schedule and Cabinet of Ministers decisions.

12. Legal entity forms

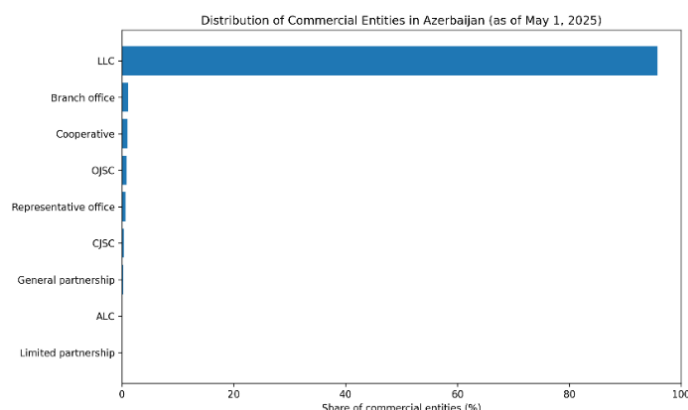
Investors in Azerbaijan have multiple options when it comes to choosing a legal entity form¹⁰¹ for their businesses.

Entity form	Description
Branch office	A separate subdivision of a foreign company in Azerbaijan that can carry out business activities on behalf of the parent company (it is not a separate legal entity).
Representative office	A local presence of a foreign company mainly for representation/marketing/liaison, typically not intended for full commercial trading (also not a separate legal entity).
General partnership	A partnership where all partners manage the business and generally have unlimited joint liability for the partnership's obligations.
Limited partnership	A partnership with at least one general partner (unlimited liability and management) and limited partners (liability limited to contribution, usually no day-to-day management).
Additional Liability Company (ALC)	A company where participants have limited liability, but also extra liability beyond their contributions up to a defined amount stated in the charter.
Limited Liability Company (LLC)	The most common corporate form: participants' liability is generally limited to their share/contribution, and the company is a separate legal entity.
Cooperative	A member-based entity created for mutual economic benefit (members contribute and participate, and profits/benefits are typically distributed according to cooperative rules).
Joint Stock Company (JSC)	A company whose capital is divided into shares, suitable when you need multiple investors, clearer governance, and potential scalability.
Open Joint Stock Company (OJSC)	A JSC where shares can generally be offered more broadly (more "open" ownership/transfer compared to a closed JSC).
Closed Joint Stock Company (CJSC)	A JSC where shares are typically held by a limited group and share transfers are more restricted than in an OJSC.

¹⁰⁰ APA - Azerbaijan Press Agency: <https://en.apa.az/entrepreneurship/azerbaijan-exempts-customs-duties-on-imported-cows-chickens-butter-421657> - last accessed: 7 April 2026.

¹⁰¹ Vigo Visa - Types of Companies in Azerbaijan: <https://www.vigovisa.com/post/types-of-companies-in-azerbaijan> - last accessed: 7 April 2026.

The data in the infographic shows that Limited Liability Companies (LLCs) overwhelmingly dominate the business landscape in Azerbaijan, accounting for nearly 96% of all registered commercial entities, making LLCs the most practical and widely used legal form for foreign investors.



13. Cooperation Models

At the meeting held on 18 February 2026 between the Minister of Agriculture of Azerbaijan and representatives of the Embassy of the Kingdom of the Netherlands, the Azerbaijani side put forward the idea of formalizing cooperation through a Memorandum of Understanding (MoU) between the two Ministries. It was further suggested that a joint working group be established to provide a structured mechanism for follow-up, legal clarity, and the timely identification of cooperation opportunities. Meanwhile for successful project implementation, international companies emphasize the importance of cooperation with strong local partners who are commercially active and well connected within the local agricultural ecosystem. Such partnerships help foreign investors better understand regulatory procedures, access local networks, and ensure smoother project implementation. Clear government support mechanisms particularly regarding permits, land allocation, and regulatory stability also play an important role in improving the investment climate for international agricultural companies¹⁰².

Existing cooperation models in Azerbaijan:

- (1) Public-private partnerships¹⁰³ (PPPs) for large or strategic infrastructure and services (with formal selection/tendering and clear risk allocation under the Law on Public-Private Partnership¹⁰⁴ adopted in 2022, implemented through the Ministry of Economy).
- (2) Business-to-business (B2B) collaboration and joint ventures, often facilitated through AZPROMO¹⁰⁵ as the state's export and investment promotion agency that helps investors navigate opportunities, partners, and procedures¹⁰⁶.
- (3) Joint innovation or pilot initiatives aligned with the government's long-term economic strategy (Strategic Roadmaps)¹⁰⁷ that emphasizes value-chain modernization, productivity, food

¹⁰² Consultations with Export Partner, March 2026.

¹⁰³ Ministry of Economy of the Republic of Azerbaijan :<https://www.economy.gov.az/en/page/muracietler/sual-cavab/dovlet-ozel-terefdasligi> - last accessed: 11 April 2026.

¹⁰⁴ Law of the Republic of Azerbaijan on Public-Private Partnership: https://heqt.gov.az/upload/tercume-edilmis-aktlar/eng/law-on-public-private-partnership-17-04-2024_FILE_3B1FD1-35ED95-8DCF39-D809DD-1574D6-451EDE.pdf - last accessed: 11 April 2026.

¹⁰⁵ AZPROMO – Azerbaijan Export and Investment Promotion Agency: <https://azpromo.az/en/page/haqqimizda/azpromo> - last accessed: 11 April 2026.

¹⁰⁶ AZPROMO – Investment Opportunities in Azerbaijan 2025: <https://azpromo.az/storage/2208/dCq8I8Qp3C-inv-2025-%281%29.pdf> - last accessed: 11 April 2026.

¹⁰⁷ Center for Analysis of Economic Reforms and Communication - Economic Review / Analytical Report: <https://ereforms.gov.az/files/review/pdf/en/1185c85eabae6e4d63f160e4ff07884.pdf> - last accessed: 11 April 2026.

safety, and stronger extension/skills systems so pilots that prove “what works” and can scale are typically welcomed.

(4) Advisory and consulting engagement models that support investment readiness (feasibility studies, compliance, QA/QC, export readiness, digital monitoring), often positioned as capacity-building and de-risking steps before scaling investments, an approach also reflected in AZPROMO’s investment guides and promotion tools¹⁰⁸.

14. Dutch Financing Instruments

Agricultural cooperation between Azerbaijan and the Netherlands may be supported by several Dutch financial and business-development institutions. The availability of support depends on the Dutch participation in the project, its commercial viability, sustainability impact, country and credit risk, transaction size and the conditions.

Invest International provides tailor-made financing for Dutch and Dutch-linked companies pursuing international projects and can support project development, export transactions and investments where conventional market financing is insufficient¹⁰⁹. It may be relevant for larger projects involving Dutch greenhouse systems, water technologies, processing equipment, cold-chain infrastructure or other integrated agricultural solutions.

The Netherlands Enterprise Agency (RVO) supports Dutch companies entering international markets through information, advice, business-development programmes, missions, matchmaking and selected subsidy schemes. Depending on programme eligibility and availability, support may be relevant for market-entry studies, demonstration activities, partnerships, responsible value-chain development and sector-based cooperation¹¹⁰.

Rabobank is a major international food and agribusiness bank. Its export-finance activities include financing imports and exports of capital goods, services and food and agribusiness commodities, often in cooperation with government-backed export credit agencies¹¹¹. Potential involvement would depend on the project’s scale, credit quality, repayment structure and risk profile and should therefore be assessed on a transaction specific basis.

FMO - Dutch Entrepreneurial Development Bank has established a significant presence in Azerbaijan through both financial sector cooperation and direct agribusiness investment. Its cooperation with Bank Respublika dates back to 2013, when FMO supported the bank’s capital position with a USD 7 million investment. This cooperation subsequently expanded through a USD 10 million facility in 2021 and a USD 20 million facility in 2022, both aimed at financing eligible end-borrowers under FMO’s Reducing Inequalities framework and supporting inclusive economic development. In May 2024, FMO and Bank Respublika concluded a further USD 25 million loan agreement, strengthening financing for micro, small and medium-sized enterprises, including agricultural businesses, as well as young and women entrepreneurs. On the margins of COP29 in Baku in 2024, the two institutions signed an additional USD 40 million loan agreement to finance green and energy-efficient projects, demonstrating a concrete Dutch contribution to Azerbaijan’s green-transition agenda. Cooperation deepened further in October 2025, when Bank Respublika secured USD 65 million from FMO, reported as the largest loan granted to a private bank in Azerbaijan. The financing is intended to support green and energy-efficient investments, agricultural-sector SMEs, and young and women entrepreneurs. FMO has also expanded its engagement in Azerbaijan through direct investment in the agrifood sector. In 2024, FMO made its first agribusiness investment in the Caucasus by selecting Azerbaijan for this milestone and

¹⁰⁸ AZPROMO - Investment Opportunities in Azerbaijan 2025: <https://azpromo.az/storage/2208/dCq8I8Qp3C-inv-2025-%281%29.pdf> - last accessed: 11 April 2026.

¹⁰⁹ Invest International: <https://investinternational.nl/what-we-do/> - last accessed: 11 April 2026.

¹¹⁰ Netherlands Enterprise Agency: <https://english.rvo.nl/topics/subsidies-invest-international> - last accessed: 11 April 2026.

¹¹¹ Rabobank: <https://www.rabobank.com/products/finance-my-business/export-finance> - last accessed: 15 April 2026.

signing a loan agreement with Araz Supermarket LLC. The financing supports the development of a new logistics facility and the expansion of Araz Supermarket's retail network, including additional coverage in regional and rural areas. Given Araz Supermarket's links with domestic agricultural suppliers and farming communities, this investment is particularly relevant to the development of Azerbaijan's agrifood value chains. FMO's activities in Azerbaijan therefore demonstrate several complementary channels through which Dutch development finance can contribute to the agricultural sector: *direct agribusiness investment, financing through local banks, support to agricultural SMEs, rural business development, inclusive entrepreneurship and green investment.*

15. Recommendations

Based on the assessment findings, stakeholder consultations, and current market conditions in Azerbaijan, Dutch companies interested in entering or expanding in the Azerbaijani agricultural sector are advised to follow a phased, partnership-based approach.

Align market entry with officially identified priority areas.

Dutch companies should focus first on the cooperation areas that have clear political visibility and institutional support, particularly greenhouse clustering in Jabrayil, floriculture expansion, seed systems, livestock genetics, water-efficient agriculture, and academic partnerships. These areas are directly aligned with the priorities discussed at ministerial level and therefore offer stronger entry points for structured cooperation.

Verify available agricultural subsidies and support mechanisms before investment.

Agricultural subsidy rates, eligibility criteria, and support mechanisms in Azerbaijan are reviewed periodically and may be revised, discontinued, or supplemented in response to changing sector priorities. Before making an investment decision, importing equipment, establishing production, or selecting a project location, Dutch companies should verify the currently applicable support measures with the Agrarian Credit and Development Agency (ACDA) and, where appropriate, with their local partners and relevant public authorities. Particular attention should be given to eligibility conditions related to crop type, location, minimum land area or herd size, irrigation technology, certified planting material, EKTIS registration, insurance, documented sales, and other technical requirements. Companies should avoid basing investment calculations solely on previously published subsidy rates and should reconfirm the applicable support immediately before project implementation.

Start with pilot projects rather than immediate full-scale investment.

Instead of entering the market at full commercial scale, Dutch companies are advised to begin with one or two designed projects. These pilots should function as small mini business cases to learn regulatory procedures, local supply-chain reliability, demand and pricing, operational costs, logistics, technical performance, and partner reliability. A successful project can then be used as the basis for scaling up.

Conduct strong partner due diligence before signing agreements.

Local partnership is important in Azerbaijan, but partner selection should be treated as a strategic risk-management issue. Dutch companies should verify the legal status, ownership structure,

financial capacity, market reputation, previous project experience, and government, institutional connections of potential partners before entering into cooperation. Where possible, references should be checked through embassies, chambers of commerce, banks, sector associations, and existing foreign companies operating in Azerbaijan.

Use staged contracts and advance payment mechanisms.

Dutch companies should avoid providing extensive technical designs, feasibility work, business planning, training, or commercial negotiations without a formal agreement and at least a reasonable advance payment. A practical approach is to divide cooperation into stages: initial assessment, technical design, pilot implementation, delivery, installation, training, and after-sales support. Each stage should have a clearly defined deliverability and payment milestone. This reduces the risk of unpaid work, last-minute cancellations, or informal use of Dutch know-how without compensation.

Protect technical knowledge, designs, and intellectual property.

For greenhouse technologies, seed varieties, floriculture planting materials, livestock genetics, software, farm-management systems, and technical designs, Dutch companies should use written agreements that clearly define ownership of know-how, licensing rights, confidentiality, permitted use, and restrictions on copying or unauthorized transfer. This is especially important in floriculture and seed-related cooperation, where plant variety protection and royalty enforcement remain sensitive issues.

Combine technology supply with training and advisory services.

Dutch technologies should not be sold as stand-alone equipment only. The assessment shows that Azerbaijan still faces shortages of specialized livestock experts, veterinarians, dairy technologists, greenhouse managers, irrigation specialists, and practical farm advisors. Therefore, Dutch companies should combine technology supply with training, demonstration, farm-level advisory services, after-sales support, and monitoring. This will increase adoption and reduce the risk of poor performance caused by weak local technical capacity.

Carefully assess feed, water, energy, and infrastructure conditions before investment.

For livestock, dairy, poultry, greenhouse, and floriculture investments, Dutch companies should conduct technical feasibility studies before. Attention should be given to feed sourcing, water availability, irrigation infrastructure, electricity reliability, gas supply, road access, cold-chain availability, and logistics costs. Feed supply is especially important for livestock and poultry projects, while water and energy efficiency are critical for greenhouse and floriculture investments.

Use agroparks and industrial zones selectively.

Agroparks, industrial zones, the Alat Free Economic Zone, and Karabakh-related incentive areas offer useful infrastructure and fiscal benefits. Dutch companies should carefully assess the actual operational status, land availability, utility connections, management capacity, logistics access, and tenant profile of each site before engagement. Incentives are valuable when location is commercially and technically viable.

Engage early with relevant public institutions.

Before importing seeds, planting materials, livestock genetics, equipment, or food-safety technologies, Dutch companies should clarify procedures with the relevant Azerbaijani institutions. This is particularly important for seed registration, phytosanitary requirements, laboratory testing, veterinary certification, plant variety protection, customs clearance, and eligibility for investment incentives. Early institutional dialogue can reduce delays and unexpected costs.

Use written contracts and dispute-resolution clauses.

All commercial cooperation should be based on written contracts with clear scope of work, technical specifications, delivery terms, payment milestones, warranty conditions, after-sales obligations, and dispute-resolution mechanisms. For larger projects, Dutch companies may consider international arbitration clauses, bank guarantees, letters of credit, or payment-security mechanisms. This is particularly important for consultancy, design, technology supply, livestock genetics, greenhouse construction, and long-term service contracts.

Annex 1. Institutional Matrix

Category	Institution / laboratory	Main responsibility and relevance	For investor need	Official website / contact
Agricultural policy and regulation	Ministry of Agriculture of the Republic of Azerbaijan	Leads agricultural policy, sector development and coordination.	Strategic cooperation, major agricultural projects and government-level coordination.	https://www.agro.gov.az/en/th-e-ministry
Agricultural regulation and services	Agrarian Services Agency (ASA) under the Ministry of Agriculture	Responsible for plant-variety registration, protection procedures relevant to Azerbaijan's UPOV obligations.	Seed/variety registration, certification, veterinary and related agricultural services.	https://agro.gov.az/en/the-ministry/subordinate-structures/departments-within-the-structure/aqrar-xidmetler-agentliyi General: info@axa.gov.az Call centre: 1652
Agricultural finance and subsidies	Agrarian Credit and Development Agency (ACDA)	Administers agricultural subsidies and state-supported financing.	Subsidies, concessional finance, machinery, irrigation, livestock financing and EKTIS-related subsidy procedures.	https://akia.gov.az/en/ https://akia.gov.az/en/content/10.html
Regional farmer services	State Agricultural Development Centers (DAIM)	Regional Ministry service centers supporting farmers and agricultural programs.	Local farmer contacts, registration, outreach and district-level coordination.	https://agro.gov.az/en/the-ministry/subordinate-structures/departments-within-the-structure/doevlet-aqrar-inkisaf-merkezleri
Agricultural analysis	Agrarian Research Center (ARC)	Provides agricultural research, market analysis, statistics and value-chain studies.	Market data, farm surveys, value-chain analysis and investment planning.	https://atm.gov.az/en
Seed security and supply	State Seed Fund	Supports strategic seed reserves and quality seed availability.	Seed supply, multiplication and public seed programs.	https://www.agro.gov.az/en/th-e-ministry/about-us
Livestock genetics	Republican Artificial Insemination Center	Provides livestock breeding, semen and artificial insemination services.	Livestock genetics, semen supply, breeding and technician training.	https://www.agro.gov.az/en/th-e-ministry/about-us
Water and irrigation	Azerbaijan State Water Resources Agency	Manages water resources, irrigation, drainage and related infrastructure.	Irrigation access, water allocation and water-infrastructure projects.	https://adsea.gov.az/
Agricultural insurance	Agricultural Insurance Fund	Operates the state-supported agricultural insurance system.	Crop, livestock and aquaculture insurance and risk protection.	https://asf.gov.az/
Food-chain regulator	Azerbaijan Food Safety Agency (AFSA)	Regulates food and feed safety, veterinary and phytosanitary controls.	Import/export approvals, food-business registration, veterinary and phytosanitary requirements.	https://afsa.gov.az/en General: info@afsa.gov.az Call center: 1003

Category	Institution / laboratory	Main responsibility and relevance	For investor need	Official website / contact
Scientific and laboratory services	Azerbaijan Food Safety Institute (AFSI)	Provides laboratory testing, research, risk assessment and technical services.	Laboratory testing, risk assessment, traceability and technical support.	https://afsi.gov.az/ General: info@afsi.gov.az
Laboratory coordination	AFSI Analytical Expertise Center	Coordinates specialized laboratory and analytical testing.	Identifying required tests and appropriate laboratories.	https://afsi.gov.az/az/institute/s-truktur
Veterinary laboratory	AFSI Central Veterinary Laboratory	Conducts veterinary diagnostic and animal-health testing.	Animal disease testing, genetic-material checks and veterinary certification support.	https://www.afsi.gov.az/az/laboratory-details/heyvan-saglamligi/merkezi-baytarliq-laboratoriyasi
Reference testing	AFSI National Reference Laboratory	Provides reference and confirmatory laboratory testing.	Confirmatory tests, reference methods and complex laboratory cases.	https://afsi.gov.az/en/city-laboratory/baki
Plant health laboratories	AFSI plant-health and phytosanitary laboratories and quarantine-expertise units	Test plants and planting materials for pests, diseases and quarantine compliance.	Seed, seedling and plant imports, phytosanitary testing and certification.	https://afsi.gov.az/az/laboratory/qida-tehlukesizliyi https://afsa.gov.az/en
Regional laboratory network	AFSI regional testing laboratories	Provide regional food, animal and plant-health testing.	Local testing and monitoring outside Baku.	https://afsi.gov.az/az/institute/hagqimizda https://afsi.gov.az/az/laboratory/heyvan-sagligi
Agrochemical and product testing	AFSI Complex Research Laboratory	Tests agricultural inputs and food products for quality and safety.	For registration or quality assessment of fertilizers, pesticides, veterinary preparations, additives and other specialized inputs.	https://afsi.gov.az/ru/laboratory-details/kompleks-tedqiqatlar/kompleks-tedqiqatlar-laboratoriyasi
Investment policy	Ministry of Economy of the Republic of Azerbaijan	Leads investment policy, incentives and a wider business environment.	For major investment projects, Investment Promotion Certificates, industrial-zone incentives, policy clarification and inter-agency coordination.	https://www.economy.gov.az/en/page/iqtisadiyyat/investisiya/investisiya-muhiti
Investment and export promotion	Export and Investment Promotion Agency - AZPROMO	Promotes foreign investment and non-oil exports.	Market entry, partner search, business matchmaking and investment promotion.	https://azpromo.az/en https://www.economy.gov.az/en/page/muracietler/sual-cavab/ixracin-ve-investisiyalarin-tesviqi

Category	Institution / laboratory	Main responsibility and relevance	For investor need	Official website / contact
Land and property	State Service on Property Issues under the Ministry of Economy	Responsible for property registration, cadastre and land-management services.	Land acquisition and lease, cadastral checks and property registration.	https://economy.gov.az/en
Tax administration	State Tax Service under the Ministry of Economy	Administers tax registration, compliance and tax incentives.	Company registration, VAT, taxation and tax incentives.	https://www.taxes.gov.az/en
Customs and border procedures	State Customs Committee	Manages customs clearance, tariffs, duties and border procedures.	Importing machinery, seeds, animals, inputs and other goods.	https://customs.gov.az/en
Free economic zone	Alat Free Economic Zone Authority	Administers the Alat Free Economic Zone and its special legal, customs, tax and operational framework for qualifying export-oriented and value-added businesses.	For export-oriented logistics, processing, warehousing and regional distribution projects considering an AFEZ location.	https://afez.az/
Standards	Azerbaijan Standardization Institute	Develops national standards and standardization services.	Product standards, specifications, packaging and conformity requirements.	https://azstand.gov.az/en
Agricultural education	Azerbaijan State Agricultural University (ADAU)	Provides agricultural education, research and specialist training.	Research partnerships, training, demonstrations and technology testing.	https://adau.edu.az/en
Applied crop research	Vegetable Research Institute	Conducts research on vegetable varieties, seed production and cultivation.	Variety trials, demonstration plots and local adaptation.	https://www.agro.gov.az/en/th e-ministry/subordinate-structures
Applied livestock research	Animal Husbandry and Fisheries Scientific Research Institute	Conducts livestock breeding, genetics, feeding and productivity research.	Genetics, feeding trials, breeding and research cooperation.	https://www.agro.gov.az/en/th e-ministry/subordinate-structures
Plant protection research	Plant Protection and Technical Crops Scientific Research Institute	Researches pests, diseases and crop-protection technologies.	Biological control, IPM, diagnostics and crop-protection trials.	https://www.agro.gov.az/en/th e-ministry/subordinate-structures
Fruit and perennial crops research	Fruit and Tea Scientific Research Institute	Researches fruit, tea, subtropical crops, nurseries and orchard technologies.	Orchard development, planting materials and variety testing.	https://www.agro.gov.az/en/th e-ministry/subordinate-structures

Annex 2. Registered Agroparks

Note: The Agropark Azerbaijan portal reports 25 registered agroparks nationwide. The table below presents the agroparks for which core information was available on the portal and websites at the time of preparation of this assessment. Competent authority for Agroparks is **Ministry of Agriculture of the Republic of Azerbaijan** and managing organization is **Agrarian Research Center under the Ministry of Agriculture**¹¹².

No.	Name of Agropark	District	Main Field(s) of Activity	Area (ha)
1	Yevlakh Pilot Agropark	Yevlakh	Fruit growing, animal husbandry, processing	2806
2	Agjabedi Grain Agropark	Aghjabadi	Horticulture, crop production	2,458
3	Agsu Agropark	Aghsu	Dairy livestock, beef livestock, crop production	1,836
4	Ulu Agropark	Gakh	Horticulture, crop production	2,150
5	Azersheker Yevlakh-Goranboy Agropark	Yevlakh	Crop production	3,032
6	İD-Agropark	Saatli	Horticulture, crop production	7,000
7	Yalama Agropark	Khachmaz	Beef livestock, crop production	2,440
8	Susən Agropark	Aghsu	Crop production, seed production	1,645
9	Shirvan Agropark	Shamakhi	Livestock	98
10	Azersheker Shemkir Agropark	Shamkir	Crop production	7,947
11	Monte Ferro Agropark	Sheki	Horticulture	2,879
12	Sabirabad Pilot Agropark	Sabirabad	Horticulture, livestock, crop production	7,264
13	Tovuz Agropark	Tovuz	Beef livestock, crop production	685
14	Shamkir Agropark	Shamkir	Intensive horticulture, sorting, packaging, logistics	465
15	Fuzuli Agropark	Fuzuli	Horticulture, crop production	2,150
16	Yashıl Ada Agropark	Bilasuvar	Crop production	4,667
17	Gazakh Agropark	Gazakh	Horticulture, crop production, sorting, packaging, logistics	808
18	İvanovka Agropark	Ismayilli	Crop production, livestock	5,010
19	Azersun Shamakhi Agropark	Shamakhi	Livestock, crop production, feed production	4,178
20	Baku Zira Agropark	Baku	Greenhouse complex	20
21	Zagatala Agropark	Zagatala	Intensive fruit growing and logistics	1156
22	Duztahir Agropark	Quba, Qusar	Intensive Fruit growing and logistics	982
23	Region Agropark	Goranboy and Samukh	Crop and seed production, fruit growing	4695
24	Salyan Agropark	Salyan	Crop production, animal husbandry, fruit growing	3000
25	Agjabedi Agropark	Agjabedi	Crop production	4800

Source: Agropark Azerbaijan Portal - <https://aqropark.az/> - last accessed: 07 September 2026
 Agropark list page - <https://aqropark.az/az/menu/24/siyahi/> - last accessed: 07 September 2026

¹¹² <https://www.agro.gov.az/az/news/100220261> - last accessed: 08 September 2026

Annex 3. Agricultural Subsidies and Newly Approved Support Measures in September 2026

USD values are approximate and calculated using 1 USD = 1.70 AZN. Actual eligibility depends on crop type, location, minimum area, certified planting material, irrigation method, EKTIS registration and **annual decisions of the Agrarian Subsidy Council**.

Sector / support measure	State support amount / rate (AZN)	Approx. USD equivalent	Key conditions
1. Crop planting, irrigation and field technology			
Wheat in 22 specialized districts	AZN 400/ha (modern irrigation), AZN 200/ha (traditional irrigation or rain-fed)	USD 235/ha, USD 118/ha	Planting subsidies differentiated by irrigation method.
Potatoes, vegetables and pulses under modern irrigation	AZN 500/ha	Approx. USD 294/ha	Apply to potatoes, vegetables, chickpeas, beans and other pulses under modern irrigation.
Potatoes and vegetables in mountainous districts and Nakhchivan AR	AZN 600/ha (modern irrigation), AZN 400/ha (other)	Approx. USD 353/ha, USD 235/ha	Special higher support for mountainous districts and Nakhchivan.
Melon crops under modern irrigation	AZN 310/ha	Approx. USD 182/ha	For areas under modern irrigation.
Laser levelling before wheat planting	Additional AZN 250/ha in the first year	Approx. USD 147/ha	Applies throughout irrigated areas where laser levelling is carried out before wheat planting on one parcel of at least 5 ha, area declared in EKTIS.
Laser levelling before cotton planting	Additional AZN 50/ton in the first year	Approx. USD 29/ton	In cotton growing districts, laser levelling before cotton planting at least 5 ha.
Cotton product subsidy	AZN 300/ton (drip), AZN 215/ton (sprinkler/pivot), AZN 200/ton (traditional)	USD 176/ton, USD 126/ton, USD 118/ton	Product subsidies differentiate by irrigation technology.
Border-area crop production	Subsidy coefficient +0.5 points above the national base coefficient	-	For farmers cultivating crops in designated border settlements.
2. Greenhouses, orchards and vineyards			
Greenhouse planting subsidy - 4th generation, glass-covered	AZN 5,000/ha	Approx. USD 2,941/ha	High-technology greenhouse.
Greenhouse planting subsidy - polycarbonate-covered	AZN 3,000/ha	Approx. USD 1,765/ha	Rate based on technology and covering material.

Sector / support measure	State support amount / rate (AZN)	Approx. USD equivalent	Key conditions
Greenhouse planting subsidy - 4th generation, high-quality polyethylene	AZN 2,500/ha	Approx. USD 1,471/ha	Rate based on technology and covering material.
Greenhouse planting subsidy - 3rd generation glass / polycarbonate / polyethylene	AZN 2,000 / 1,500 / 1,000 per ha	Approx. USD 1,176 / 882 / 588 per ha	Rate depends on covering material.
Other polyethylene-covered greenhouses	AZN 500/ha	Approx. USD 294/ha	Lower-tier greenhouse planting subsidy.
New aronia orchards	AZN 7,500/ha, one-off	Approx. USD 4,412/ha	Support for a high-value, export-oriented crop.
Open-field roses for essential-oil production	AZN 6,000/ha	Approx. USD 3,529/ha	For open-field rose cultivation intended for essential-oil production.
Super-intensive vineyards for boutique wineries	AZN 20,000/ha	Approx. USD 11,765/ha	Model covers 5-20 ha, supports premium local-variety wine production, agritourism and export-oriented micro-brands.
Intensive vineyards for boutique wineries	AZN 10,000/ha	Approx. USD 5,882/ha	Support under the boutique-winery development model.
3. Horticulture eligibility changes (non-cash conditions)			
Intensive olive orchards	Minimum eligible area reduced from 50 ha to 5 ha	-	Eligibility simplification.
Orchards in Nakhchivan AR	Minimum eligible area reduced to 1 ha	-	Applies to all orchards in Nakhchivan under the announced rules.
Certified planting material for orchards	Certified seedlings remain required, EC and virus-free analysis requirements removed	-	Simplified orchard subsidy conditions.
Intensive technical and table-grape vineyards	Horticulture subsidy eligibility extended nationwide	-	Geographic coverage broadened.
Pistachio orchards	Maximum eligible elevation increased to 1,000 m	-	Eligibility threshold changed.
Pomegranate in Karabakh and East Zangezur	Minimum elevation requirement removed	-	Eligibility threshold changed.
Olives in Karabakh and East Zangezur	Maximum eligible elevation increased to 300 m	-	Eligibility threshold changed.
Walnut orchards in Nakhchivan	Minimum elevation requirement removed	-	Eligibility threshold changed.
4. Product subsidies for processing and market delivery			

Sector / support measure	State support amount / rate (AZN)	Approx. USD equivalent	Key conditions
Technical grapes delivered for processing	AZN 50/ton	Approx. USD 29/ton	Product subsidy for delivery to processing enterprises.
Olives delivered for processing	AZN 30/ton	Approx. USD 18/ton	Product subsidy for delivery to processing enterprises.
Persimmons delivered for processing	AZN 50/ton	Approx. USD 29/ton	Product subsidy for delivery to processing enterprises.
In-shell almonds delivered for processing	AZN 30/ton	Approx. USD 18/ton	Product subsidy for delivery to processing enterprises.
Roses delivered for essential-oil production	AZN 100/ton	Approx. USD 59/ton	For roses supplied for essential oil processing.
Liquorice delivered for processing	AZN 10/ton	Approx. USD 6/ton	Product subsidy.
Malting barley delivered for processing	AZN 50/ton	Approx. USD 29/ton	Product subsidy.
Wheat from laser-levelled land in the 22 specialised districts delivered to mills	AZN 40/ton	Approx. USD 24/ton	Product subsidy, announced together with continuation of the food-wheat program.
Wheat delivered to purchasers in Nakhchivan AR	AZN 50/ton	Approx. USD 29/ton	Product subsidy for eligible deliveries.
5. Seed, certification, advance payment and insurance			
Locally produced super-elite wheat and barley seed	Additional AZN 470/ha	Approx. USD 276/ha	Higher planting subsidies for local super-elite seed producers.
Foreign-origin super-elite wheat and barley seed production	Additional AZN 300/ha	Approx. USD 176/ha	Higher planting subsidy for production of super-elite seed of foreign origin.
Certified wheat and barley seed requirement	Threshold reduced to 5 ha, 50% subsidy reduction in 2026-2027 if certified seed is not used, coefficient becomes zero in 2027-2028	-	Important eligibility changes for wheat and barley planting subsidies.
International agricultural certification	AZN 7,000-36,000 depending on certificate	Approx. USD 4,118-21,176	Covers GlobalG.A.P., FSSC 22000, HACCP, GRASP, BRCGS, FSMA and international organic certification.
Maintenance of an eligible international certificate	Annual support equal to 10% of the applicable certification amount	-	For keeping the certificate active.
Advance payment of planting subsidy	30% of planting subsidy paid in advance	-	For qualifying farms with 5-100 ha, specified annual spring and autumn crops and farmer rating above 30, EKTIS declaration and monitoring apply.

Sector / support measure	State support amount / rate (AZN)	Approx. USD equivalent	Key conditions
Crop-insurance requirement	No separate payment, insurance required	-	For main/repeated planting subsidies, wheat, barley, rice, maize and sunflower are subject to the announced insurance requirement at a 7 ha minimum threshold.
New orchards receiving horticulture subsidy	No separate payment, at least 3 years of insurance required	-	Insurance required under the Law on Agricultural Insurance.
6. Machinery, irrigation systems, green energy and processing equipment			
Specified agricultural machinery and infrastructure	Up to 50% of eligible cost	-	Includes grain, cotton and forage harvesters, feed-distributing combines, laser levellers, cold stores, grain silos, reservoir membranes and agricultural solar panels.
Locally produced drip irrigation systems	60% of eligible cost	-	Support share of eligible system cost.
Imported drip irrigation systems	50% of eligible cost	-	Support share of eligible system cost.
Small winery equipment	60% of eligible cost	-	For equipment used to establish small wineries.
Greenhouse technological equipment	20% of eligible cost	-	Support for eligible greenhouse technology.
Locally produced greenhouse metal structures and glass	20% of eligible cost	-	Support for locally produced greenhouse components.
7. Aquaculture			
Salmonid and sturgeon aquaculture	AZN 2,000/ton	Approx. USD 1,176/ton	Product subsidy for EKTIS-registered farms where product is sold to purchasers with official sales documentation.
Carp and catfish aquaculture	AZN 600/ton	Approx. USD 353/ton	Product subsidy for EKTIS-registered farms where product is sold to purchasers with official sales documentation.
8. Poultry and dairy			
Table eggs produced in Nakhchivan AR	AZN 30 per 1,000 eggs	Approx. USD 18 per 1,000 eggs	For table eggs produced by registered poultry farms and sold to purchasers.
Cooled raw milk delivered to registered processors / collection centres	AZN 0.07/litre or AZN 70/ton	Approx. USD 0.04/litre or USD 41/ton	Requires EKTIS declaration, animal identification, insurance, cooling and compliance with quality requirements.
Milk delivered through cooperatives	Additional 20% on the milk subsidy	-	Applies where eligible milk is delivered through cooperatives.
9. Cattle and livestock			

Sector / support measure	State support amount / rate (AZN)	Approx. USD equivalent	Key conditions
New intensive dairy and dual-purpose cattle farms	AZN 1,500/head	Approx. USD 882/head	For eligible intensive farms established after 1 October 2026.
New intensive beef cattle farms	AZN 1,000/head	Approx. USD 588/head	For eligible intensive farms established after 1 October 2026.
Existing pedigree dairy animals	AZN 500/head/year	Approx. USD 294/head/year	Minimum 50 pedigree dairy animals are required to benefit from the animal subsidy.
Locally bred pedigree dairy animals	AZN 800/head/year	Approx. USD 471/head/year	Annual animal subsidy, minimum herd conditions apply.
Crossbred dairy animals	AZN 200/head/year	Approx. USD 118/head/year	Minimum 100 crossbred dairy animals required to benefit from the animal subsidy.
Registered sheep and goats linked to pasture management	AZN 4/head	Approx. USD 2.35/head	Farms must have at least 500 sheep and goats and at least 100 ha of pasture/grazing land, improving soil fertility and biodiversity is a key condition.
High-weight cattle slaughter	AZN 0.40/kg live weight	Approx. USD 0.24/kg live weight	For cattle of 600 kg live weight or more, animal must be born in Azerbaijan or fattened in Azerbaijan for at least 6 months, EKTIS declaration, identification, insurance and registered slaughter required.
Cattle hides delivered for processing	AZN 3/piece	Approx. USD 1.76/piece	Product subsidy for hides delivered to processing enterprises.
Sheep and goat hides delivered for processing	AZN 0.30/piece	Approx. USD 0.18/piece	Product subsidy for hides delivered to processing enterprises.
Wool delivered for processing	AZN 0.30/kg	Approx. USD 0.18/kg	Product subsidy for wool delivered to processing enterprises.
10. Artificial insemination, embryo transfer and horse breeding			
Artificial insemination - first-generation calf from local breed	AZN 75/calf	Approx. USD 44/calf	Differentiated artificial-insemination subsidy.
Artificial insemination - second and subsequent generations	AZN 150/calf	Approx. USD 88/calf	Differentiated artificial-insemination subsidy.
Calf from high-productivity animals of domestic breeding farms	AZN 50/calf	Approx. USD 29/calf	Differentiated calf subsidy.
Embryo-transfer calf	AZN 250/calf	Approx. USD 147/calf	Subsidy for calves obtained through embryo transfer.

Sector / support measure	State support amount / rate (AZN)	Approx. USD equivalent	Key conditions
Karabakh and Dilbaz foals under 2 years	AZN 600/head/year	Approx. USD 353/head/year	EKTIS registration, electronic microchipping and DNA confirmation of parentage required.
Karabakh and Dilbaz breeding mares over 2 years	AZN 800/head/year	Approx. USD 471/head/year	EKTIS registration, electronic microchipping and DNA confirmation of parentage required.
Karabakh and Dilbaz breeding stallions	AZN 1,000/head/year	Approx. USD 588/head/year	EKTIS registration, electronic microchipping and DNA confirmation of parentage required.

Source: Agrarian Subsidy Council and Ministry of Agriculture of the Republic of Azerbaijan, September 2026 announcement. Detailed 2027 coefficients and implementation regulations: www.akia.gov.az - last accessed 11 September 2026.

Azerbaijan's agricultural support policy increasingly prioritises *modern irrigation, high-value horticulture, certified seeds and planting materials, agricultural mechanisation, greenhouse technologies, livestock genetics, processing, cold-chain infrastructure and risk management*. New support measures approved in September 2026¹¹³ further strengthen **incentives for water-efficient irrigation, selected agricultural machinery and equipment, greenhouse technology, intensive livestock production and aquaculture**. The above table presents selected agricultural support measures approved by the Agrarian Subsidy Council in September 2026. Implementation dates and detailed eligibility conditions vary by measure. Applicable rates and technical requirements should be confirmed with the Agrarian Credit and Development Agency (ACDA).

¹¹³ <https://agro.gov.az/index.php/az/news/070920261> - last accessed: 11 September 2026

Annex 4. Dutch Financing and Support Instruments Relevant to Agricultural Cooperation with Azerbaijan

No.	Instrument	How Azerbaijani companies can benefit
1	RVO - DHI	Useful when an Azerbaijani company wants to test or introduce a Dutch technology, such as greenhouse systems, irrigation, machinery, post-harvest equipment or livestock technology. The Dutch partner normally applies for the support, while the Azerbaijani company can act as the local business partner or demonstration site.
2	RVO - Partners for International Business (PIB)	Useful when several Dutch companies want to enter Azerbaijan together. Azerbaijani companies can become local partners, buyers, distributors, pilot sites or business contacts in a Dutch sector cluster, for example in horticulture, livestock or water management.
3	RVO - Support International Business (SIB)	Mainly supports Dutch SMEs that want to enter a new market. Azerbaijani companies can benefit by becoming local distributors, agents, buyers or business partners of Dutch companies using this support to explore Azerbaijan.
4	Seed Money Projects (SMP)	Useful for starting new cooperation between Dutch and Azerbaijani companies and knowledge institutions. It can help partners explore a joint idea, carry out initial studies, build a consortium or prepare a larger future project.
5	Invest International / DTIF	Relevant when a Dutch company wants to invest in Azerbaijan or sell machinery, equipment or other capital goods to an Azerbaijani buyer. It can help make financing possible when normal bank finance is difficult to obtain.
6	Invest International - Agri-food Financing	Useful for larger agricultural or food-sector projects involving a Dutch company or Dutch technology. Azerbaijani companies can use it through cooperation with a Dutch investor, supplier or project partner when additional financing is needed.
7	FMO - Agribusiness, Food and Forestry	Relevant mainly for larger Azerbaijani agribusinesses seeking investment or long-term finance for farming, processing, storage, cold chain, logistics or food production. FMO can finance eligible companies directly if the project meets its commercial, environmental and development criteria.
8	Atradius Dutch State Business	Useful when an Azerbaijani company wants to buy Dutch machinery, greenhouse systems, irrigation equipment, processing lines or other capital goods. Atradius can insure the Dutch exporter against payment risks, which may also make it easier for the Azerbaijani buyer to obtain longer payment terms or bank financing.

Note: Most Dutch support instruments are accessed through a Dutch company, exporter or investor. Azerbaijani companies can benefit by partnering with Dutch firms as buyers, distributors, local project partners, demonstration sites, joint-venture partners or investment recipients. Eligibility and financing conditions vary by instrument.

Annex 5. Potential Dutch Seed and Planting Material Companies for Cooperation with Azerbaijan

The companies below have been selected because of their international activities and potential relevance to Azerbaijan's greenhouse production, open-field horticulture, potato production, livestock and forage systems and climate-resilient agriculture. The list is intended for market exploration. Current representation or distributorship arrangements in Azerbaijan should be confirmed directly with each company before commercial engagement.

No.	Company	Main Activities and Products
1	Bakker Brothers	Dutch vegetable seed breeding company developing and supplying varieties for crops including tomato, bean, eggplant, cabbage, carrot, lettuce and onion . The company also offers <i>seed-enhancement treatment and technical support to growers</i> .
2	Axia Vegetable Seeds	Dutch vegetable breeding company specialising primarily in tomato varieties for professional greenhouse production . Its portfolio includes multiple tomato segments and high-resistance ToBRFV varieties, with a focus on yield, quality, flavour and disease resistance.
3	Holland-Select	Dutch seed company specialising in the breeding, production and sale of dwarf beans, climbing beans, broad beans and selected fresh-market peas . It also maintains selections of Amsterdam-type baby carrots and scorzonera (qara kök) .
4	Majstro Seeds	Independent Dutch seed company specialising in breeding, producing and marketing short cucumber and gherkin (turşuya qoymaq üçün istifadə olunan xiyar növü) varieties for professional growers.
5	EU-ZADEN B.V.	Netherlands-registered company active in the wholesale trade of seeds, planting material and legumes .
6	Hortiland Holland B.V.	Netherlands-based horticultural company developing and distributing hybrid vegetable seeds, plant nutrients and speciality fertilisers, and biological plant-nutrition and crop-protection products , supported by agronomic advisory services.
7	Solynta	Dutch potato-breeding company specialising in Hybrid True Potato Seed (HTPS) technology. Its hybrid potato varieties are grown from botanical seed rather than conventional seed tubers and are designed to provide logistical, phytosanitary and agronomic advantages, including disease-resistance traits in selected varieties.
8	HZPC	Netherlands-based global potato company specialising in potato breeding, seed-potato trading and variety development. Its varieties serve fresh, traditional, French-fry, crisp and other market segments and are developed for different growing conditions and markets.
9	Meijer Potato	Dutch potato breeding and seed-potato company developing and marketing varieties for the table, French-fry and crisp-processing markets, with emphasis on yield, quality, market requirements and performance under different growing conditions.
10	Royal Barenbrug Group	Dutch family-owned company specialising in grass and forage breeding and seed solutions, including forage grasses, clovers, lucerne, pasture mixtures and green-manure crops . Its research focuses on forage productivity, feed value, drought and climate resilience, soil health and sustainable grassland management.
11	MENACO B.V.	Netherlands-based commercial vegetable seed company offering varieties under three commercial brands: Nickerson-Zwaan, DP Elite Zaden and Huizer Zaden. The company focuses particularly on the Middle East and North Africa and combines seed supply with local demonstrations and grower support.

Annex 6. Veterinary Certificate for Bovine Semen Exported to the Republic of Azerbaijan.

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**VETERINARY CERTIFICATE FOR BOVINE SEMEN EXPORTED TO THE REPUBLIC OF AZERBAIJAN /
AZƏRBAYCAN RESPUBLİKASINA İXRAC OLUNAN TÖRƏDİCİ BUĞALARIN TOXUMLARINA DAİR BAYTARLIQ SERTİFİKATI**

Part I : Details of dispatched consignment / Göndərilən yük haqqında məlumat					
I.1. Consignor / Yükgöndərən Name/ Ad Address / Ünvan Country / Ölkəsi		I.2. Certificate reference No. / Sertifikatın No. I.3. Competent authority exporting country / İxracatçı ölkənin səlahiyyətli orqanı			
I.4. Consignee / Yükalanın Name / Ad Address / Ünvan Country / Ölkəsi					
I.5. Country of origin / Mənşə ölkəsi		I.6. Region of origin / Mənşə bölgəsi		I.7. Country of destination / Tayinat ölkəsi	
I.8. Place of origin / Mənşə yeri Name / Ad Approval number / Təsdiq nömrəsi Address / Ünvan					
I.9. Place of loading / Yükləmə yeri			I.10. Date of departure / Yola düşmə tarixi		
I.11. Transport / Nəqliyyat Aeroplane / ☐ Ship / Gəmi ☐ Railway wagon / ☐ Təyyarə ☐ Dəmiryol vaqonu ☐ Road vehicle / Yol ☐ Other / Digər ☐ nəqliyyat vasitəsi Identification / Kimlik Documentary references / Sənədlərə istinad			I.12. Entry border inspection posts in Republic of Azerbaijan / Azərbaycan Respublikasındakı sərhəd giriş nəzarət məntəqəsi		
I.13. Description of commodity / Məhsulun təsviri			I.14. Commodity code (HS code) / Əmtəə kodu (XİF MN üzrə)		
			I.15. Quantity / Miqdar		
I.16. Commodities intended for use as / İstifadəsi harda nəzərdə tutulub Artificial reproduction / Süni mayalanma ☐			I.17. Number and type of packages / Qəbləşmə sayı və növü		
I.18. Identification of commodities / Məhsulun identifikasiyası					
Name / Ad	Breed/Category/ Cins / Kateqoriya	Identification number/ İdentifikasiya nömrəsi	Date of collection/ Toplanması tarixi	Quality (dose) / Miqdar (doza)	Approval number of the centre/team / Mərkəzin qeydiyyat nömrəsi

H.I.J. Roest, DVM, PhD
Acting Chief Veterinary Officer



Galib Abdullayev,
Head of Animal Health and Biosecurity
Department, Food Safety Agency
of the Republic of Azerbaijan,
Chief Veterinary Officer

II. Health information / Sağlamlıq haqqında məlumat	II.a. Certificate reference No. / Sertifikatın No.	II.b. TRACES reference number XXXXXXXXXXXXXXXXXXXX
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I, the undersigned State/Official Veterinarian certify that: /
Mən, Dövlət Baytarlıq müfəttişi, aşağıda qeyd olunanların həqiqətliyini imza ilə təsdiq edirəm:

II.1. The semen has been collected at a semen collection centre which was approved in accordance with EU-legislation and which was under permanent supervision of a veterinarian, at the time of semen collection for this consignment; /
Buğa toxumu bu partiya üçün toplanma zamanı daim baytar həkiminin nəzarəti altında olan və Avropa İttifaqı qanunvericiliyinə uyğun şəkildə təsdiq edilmiş buğa toxumu toplama mərkəzində götürülmüşdür;

II.2. Semen originates from semen collection centre(s) and/or administrative territory which are officially free from following contagious diseases: /
Toxumlar, heyvanların yoluxucu xəstəliklərindən rəsmi olaraq azad olan inzibati ərazilərdə yerləşmiş müəssisələrdə alınırlar, o cümlədən:

- The Netherlands has been free from foot-and-mouth disease in accordance with the WOA Health Code, during the last 12 months prior to semen collection for this consignment; /
Niderland bu partiya üçün buğa toxumu toplanmasından əvvəl son 12 ay ərzində WOA Quru Heyvanlarının Sağlamlığı Məcəlləsinə uyğun olaraq dabağa xəstəliyindən azad olmuşdur;
- The Netherlands has been free from rinderpest and contagious bovine pleuropneumonia in accordance with the WOA Health Code, during the last 24 months prior to certification; /
Niderland, sertifikatlaşdırmadan əvvəl son 24 ay ərzində WOA Quru Heyvanlarının Sağlamlığı Məcəlləsinə uyğun olaraq iribuyuzlu heyvan və yoluxucu iribuyuzlu pleuropnevmoniyadan azad olmuşdur;
- The donor bulls have been inspected on the day of semen collection for this consignment and they did not show any clinical symptoms of bluetongue; /
Donor buğalar bu partiya üçün buğa toxumu götürüldüyü gün yoxlanılıb və onlarda blutanq xəstəliyinin heç bir klinik əlaməti müşahidə olunmayıb;

The donor bulls have been kept in the Netherlands which has been free from bluetongue for at least 60 days prior to and during collection of the semen in this consignment; /
Donor buğalar bu partiya üçün buğa toxumunun toplanmasından əvvəl və toplanma müddətində ən azı 60 gün müddətinə Niderlandda saxlanılmışdır və bu müddətdə blutanqdan azad olmuşdur;

or /
və ya^(*) At least every 60 days throughout the collection period and between 28 and 60 days after the final collection for this consignment, the donor bulls have been subjected to a serological antibody test for bluetongue virus in accordance with the WOA Health Code, with negative results; /
Toplanma dövrü ərzində hər 60 gündən bir və son toplanmadan sonra 28–60 gün ərzində donor buğalar WOA Quru Heyvanlarının Sağlamlığı Məcəlləsinə uyğun olaraq blutanq virusuna qarşı seroloji anticişim testinə cəlb olunmuş və nəticələr mənfi olmuşdur;

or /
və ya^(*) The donor bulls have been subjected to an agent identification test for bluetongue virus in accordance with the WOA Health Code on blood samples collected prior to and after semen collection for this consignment and at least every 7 days (virus isolation test) or at least every 28 days (PCR test) during semen collection for this consignment with negative results; /
Donor buğalardan bu partiya üçün buğa toxumu toplanmasından əvvəl və sonra götürülən qan nümunələrində WOA Quru Heyvanlarının Sağlamlığı Məcəlləsinə uyğun olaraq blutanq virusunun identifikasiyası üçün test aparılmış və buğa toxumu toplama müddətində ən azı hər 7 gündən bir (virus izolyasiya testi) və ya ən azı hər 28 gündən bir (PCR testi) yoxlanmış, bütün nəticələr mənfi olmuşdur;

or /
və ya^(*) The donor bulls have been kept in the Netherlands which has been free from bluetongue from February 15th 2012 until September 5th 2023 in accordance with the WOA Health Code and the semen in this consignment has been collected between February 15th 2012 and July 6th 2023; /
Donor buğalar 15 fevral 2012-ci ildən 5 sentyabr 2023-cü ilədək WOA Quru Heyvanlarının Sağlamlığı Məcəlləsinə əsasən Niderlandda saxlanılmışdır və bu dövrdə ölkə blutanqdan azad olmuşdur; bu partiya üçün buğa toxumu 15 fevral 2012 ilə 6 iyul 2023 tarixləri arasında toplanmışdır;

- The semen has been collected, processed and stored in accordance with the WOA Health Code; /
Buğa toxumu WOA Quru Heyvanlarının Sağlamlığı Məcəlləsinə uyğun olaraq toplanmış, emal edilmiş və saxlanılmışdır;
- No cases of bovine brucellosis, paratuberculosis and bovine tuberculosis have been reported at the semen collection centre during the last 6 months prior to semen collection for the consignment; /
Bu partiya üçün buğa toxumu toplanmasından əvvəlki son 6 ay ərzində buğa toxumu toplama mərkəzində mal brusellyozu, paratuberkulyoz və mal vərəmi halları qeydə alınmamışdır;
- No cases of chlamydia have been reported at the semen collection centre during the last 6 months prior to semen collection for this consignment; /
Bu partiya üçün buğa toxumu toplanmasından əvvəlki son 6 ay ərzində buğa toxumu toplama mərkəzində xlamidioz halları qeydə alınmamışdır;
- No cases of infectious bovine rhinotracheitis (IBR)/infectious pustular vulvovaginitis (IPV), trichomoniasis (T. foetus), campylobacteriosis (C. fetus ssp. venerealis), bovine viral diarrhoea and enzootic bovine leucosis have been reported at the semen collection centre during the last 12 months prior to semen collection for the consignment; /
Bu partiya üçün buğa toxumu toplanmasından əvvəlki son 12 ay ərzində buğa toxumu toplama mərkəzində yoluxucu mal rinotraxeiti (IBR)/yoluxucu püstulyar vulvovaginit (IPV), trixomonoz (T. foetus), kampilobakterioz (C. fetus ssp. venerealis), mal viral diareyası və enzootik mal leykozu halları qeydə alınmamışdır;

H.I.J. Roest, DVM, PhD

Acting Chief Veterinary Officer

Chief Veterinary
OfficerGallib Abdulaliyev,
Head of Animal Health and Biosecurity
Department, Food Safety Agency
of the Republic of Azerbaijan,
Chief Veterinary Officer

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- No cases of leptospirosis (L. Hardjo) have been reported at the semen collection centre during the last 3 months prior to semen collection for the consignment; /
Bu partiyaya aid buğa toxumu toplanmasından əvvəlki son 3 ay ərzində buğa toxumu toplama mərkəzində leptospiroz (L. Hardjo) halları qeydə alınmamışdır;
 - No cases of anthrax have been reported at the semen collection centre during the last 20 days prior to semen collection for the consignment; /
Bu partiyaya aid buğa toxumu toplanmasından əvvəlki son 20 gün ərzində buğa toxumu toplama mərkəzində qarayara halları qeydə alınmamışdır;
- II.3. The donor bulls have not been vaccinated against brucellosis; / Donor buğalar brusellyoza qarşı peyvənd olunmamışdır;
- II.4. The donor bulls are not genetically connected in the female line with cattle originating from Great Britain, France, Ireland, Switzerland and Portugal in the last two generations; /
Donor buğalar ana xətti üzrə son iki nəsildə Böyük Britaniya, Fransa, İrlandiya, İsveçrə və Portuqaliyadan olan iribuynuzlu heyvanlarla genetik əlaqəyə malik deyillər;
- II.5. The donor-bulls have not received feed of animal origin, manufactured from protein processed from ruminant animals, excluding components permitted by the WOA Code; /
Donor buğalara WOA Məcəlləsinə əsasən yalnız icazə verilmiş komponentlər istisna olmaqla, ruminant mənşəli heyvan zülalından hazırlanmış yemlər verilməmişdir;
- II.6. At the semen collection centre there are no other ruminants present than bulls; /
Buğa toxumu toplama mərkəzində donor buğalardan başqa digər ruminant heyvanlar saxlanılmamışdır;
- II.7. - The donor bulls at the semen collection centre have been kept in quarantine for at least 30 days prior to entering the semen collection centre; /
Donor buğalar buğa toxumu toplama mərkəzinə daxil edilməzdən əvvəl ən azı 30 gün karantində saxlanılmışdır;
- The donor bulls have not been used for natural mating since entering the semen collection centre; /
Donor buğalar buğa toxumu toplama mərkəzinə daxil olduqdan sonra təbii yolla mayalanmada istifadə olunmamışdır;
 - All laboratory tests have been carried out in officially approved laboratories; /
Bütün laborator müayinələr yalnız rəsmi təsdiq edilmiş laboratoriyalarda aparılmışdır;
 - Within the last 6 months prior to semen collection for this consignment, the donor bulls at the semen collection centre have been subjected to tests for bovine tuberculosis, infectious bovine rhinotracheitis (IBR)/infectious pustular vulvovaginitis (IPV), enzootic bovine leukosis, campylobacteriosis (C. fetus ssp. venerealis), trichomoniasis (T. fetus) and bovine viral diarrhoea (BVD) with negative results; /
Bu partiyaya aid buğa toxumu toplanmasından əvvəlki son 6 ay ərzində buğa toxumu toplama mərkəzindəki donor buğalar mal vədəmi, yoluxucu mal rinotraxeiti (IBR) / yoluxucu püstulyar vulvovaginit (IPV), enzootik mal leykozu, kampilobakterioz (C. fetus ssp. venerealis), trixomonoz (T. foetus) və mal viral diareyası (BVD) üzrə testlərdən keçirilmiş və nəticələr mənfi olmuşdur
 - Within the last 6 months prior to semen collection for this consignment, the donor bulls at the semen collection centre have been subjected to tests for paratuberculosis and leptospirosis (L. Hardjo) with negative results; /
Bu partiyaya aid buğa toxumu toplanmasından əvvəlki son 6 ay ərzində donor buğalar paratuberkulyoz və leptospiroz (L. Hardjo) üzrə testlərdən keçirilmiş, nəticələr mənfi olmuşdur;
- II.8. A combination of antibiotics against campylobacters, leptospires and mycoplasmas has been added to the semen. /
Buğa toxumuna kampilobakterlərə, leptospiralara və mikoplazmalara qarşı antibiotiklərin kombinasiyası əlavə edilmişdir.

(*) Delete as appropriate / Uyğun olmayanı silin

Signature and stamp must be in a different colour to that in the printed certificate / İmza və möhürün rəngi blankin rəngindən seçilməsi vacibdir.

H.I.J. Roest, DVM, PhD
Acting Chief Veterinary Officer



Galib Abdullayev,
Head of Animal Health and Biosecurity
Department, Food Safety Agency
of the Republic of Azerbaijan,
Chief Veterinary Officer

List of Interviewed Stakeholders

Lalezar Imamquliyeva, Director, AzRose LLC
Mehman Sadigov, Director, Plantlife Greenhouse
Fikret Feyziyev, Head of the Department for State Seed Control and Organization of Plant Breeding, Agrarian Services Agency under the Ministry of Agriculture
Anar Azimov, Head of the International Relations Department, Food Safety Agency of the Republic of Azerbaijan
Aftandil Shahbazli, Regional Sales Manager, Rijk Zwaan
Vugar Babayev, Director, Onion Growers Association
Len Nijhof, Trade Exhibition Manager, Export Partner
Nizami Ibrahimli, Representative, Syngenta Seeds B.V.
Araz Valizade, Representative, Bayer B.V.

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