



Food and Agriculture Organization
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European Bank
for Reconstruction and Development

FAO INVESTMENT CENTRE

INVESTMENT SOLUTIONS
FOR SUSTAINABLE FOOD AND AGRICULTURE

SUSTAINABLE URBAN FOOD AND FOOD WASTE LOGISTICS IN ISTANBUL

**KICK-OFF WORKSHOP – 17 JUNE
2025**

**EBRD/FAO AGRI-FOOD CLIMATE
AND ENVIRONMENTAL
SUSTAINABILITY (ACES) INITIATIVE**



Workshop Agenda

9h15 - Opening remarks

9h30 - Introduction of FAO/EBRD report *Building Resilience in Urban Food Logistics Systems*

9h45 - Preliminary urban food logistics assessment in Istanbul : key findings

10h - Q&A

10h15 – Coffee break

10h30 – 12.30 - Word Café discussions

- Session 1: 10:30 - 11:10
- Session 2: 11:10 - 11:50
- Debrief at 11.50

12h25 - Next steps and closure

Objectives of the workshop

- Introduce FAO/EBRD project and key areas of interventions
- Present the origins of the project and the vision guiding the implementation: previous study on building resilience in urban food logistics
- Share initial findings of the work achieved by the team during the last months in Istanbul
- Engage with urban food logistics actors (public and private) and building collaborative vision and initiatives
- Discuss and identify key areas of interventions for the project in the next two years:
 - ✓ Potential activities
 - ✓ Deliverables
 - ✓ Partners

Resilient & Sustainable Urban Food and Food Waste Logistics in Istanbul and Bursa



Context and rationale.

Global disruptions (COVID-19, Ukraine war, climate change) affected supply chains, prices, and consumption patterns.

Urban areas under pressure to ensure resilient, sustainable access to food while minimizing environmental impact.

Istanbul (16 million people; 1/3 of national food consumption) and Bursa – grappling with traffic congestion, lack of consolidation centres, weak urban–peri-urban producer linkages, inadequate last-mile infrastructure, absence of a coherent logistics strategy



Objective. Work with Istanbul and Bursa to identify policy and investment entry points for resilient and green urban food logistics and improved regional food linkages.

Also aims to build stakeholder capacity and foster structured dialogue.



Scope of Work. Analyse food supply/distribution systems (stakeholder mapping, urban–rural linkages, retail evolution, resilience).

Assess urban food waste logistics and valorisation pathways.

Benchmark Turkish urban strategies against international best practices.

Develop tailored green urban food logistics activities: green belt linkage, mapping of logistics flows, optimization of markets, circular economy...

Design and deliver engagement tools and platforms to mobilise stakeholders.



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BUILDING RESILIENCE IN URBAN FOOD LOGISTICS SYSTEMS

Published in Dec 2024



Objectives and scope

Objectives: Analyze how urban authorities can enhance the resilience and sustainability of urban food logistics systems



Understand significant transformations and challenges in urban food logistics systems that have emerged in recent years.



Identify global best practices and trends in municipal-level investments and regulatory measures that improve food and nutrition security in cities.



Propose specific areas for support and investment, to build stronger urban food logistics systems

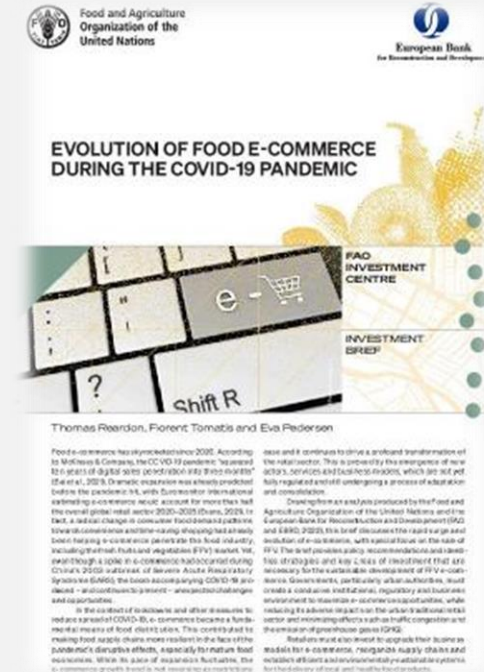
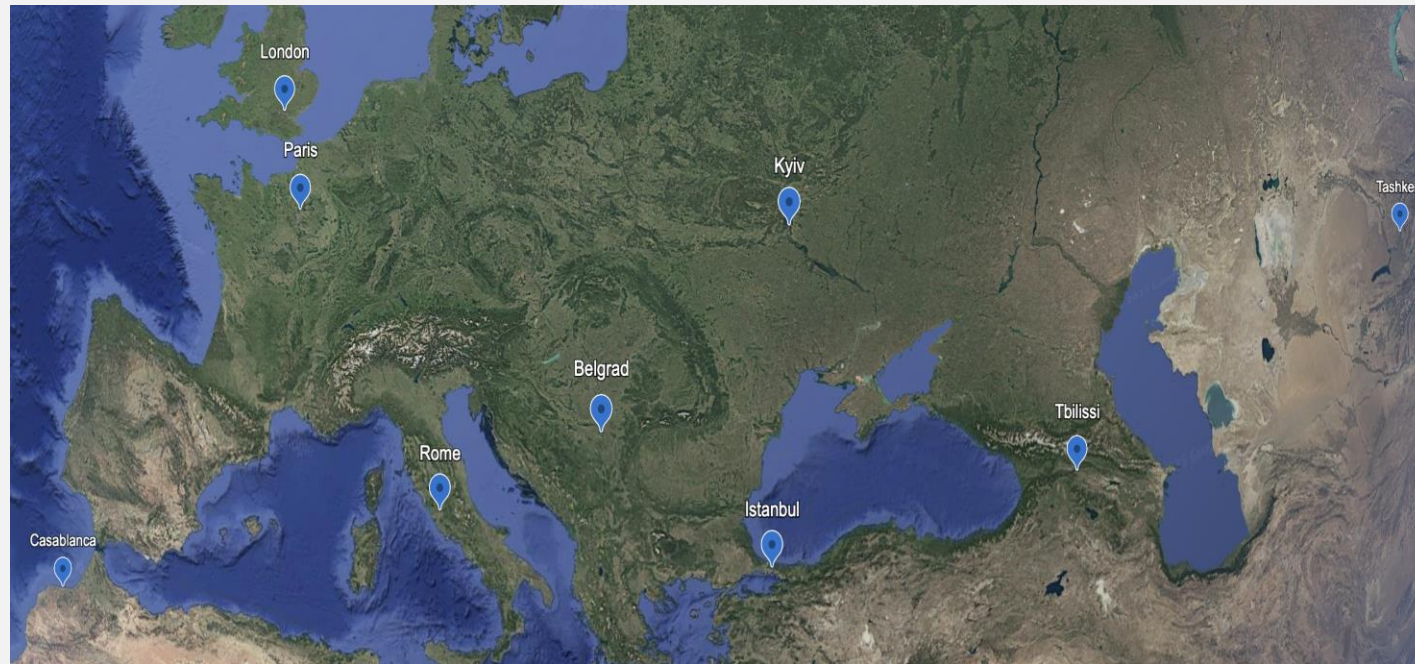
Scope and content

- **Lessons learned from the COVID-19 pandemic** for urban consumers, retailers, logisticians, and local authorities, highlighting the critical need for resilience and
- **Major trends supporting the transformation of urban food logistics**, such as increased linkages with rural areas and improvements in urban food logistics infrastructure.
- **A roadmap with actionable policy recommendations** for urban authorities, policymakers, and stakeholders to navigate and improve the future of urban food logistics, building resilient, innovative, and equitable urban food systems through robust infrastructure, digital transformation, sustainable practices, and collaborative governance.

Methodology



- ✓ FAO/EBRD Covid 19 package
- ✓ 9 city case studies in 9 countries
- ✓ Approach per marketing channels analysis
- ✓ Additional global examples (e.g. Latin America,)
- ✓ Quantitative and qualitative data collection
- ✓ 180 interviews (modern retailers, retail SMEs, Ecommerce players and urban authorities)



Lessons learnt from Covid-19 pandemic and War in Ukraine

Urban centers rely on complex supply chains that span continents and depend on seamless coordination among producers, transporters, wholesalers, retailers, and urban planners.

Crisis impacts:

- Global supply chain disruption:
 - ✓ Interruption long-distance food flows
 - ✓ Food inflation
 - ✓ Exacerbation food insecurity.
- Rapidly evolving consumer preferences
 - ✓ Healthy,
 - ✓ Locally sourced, and
 - ✓ Convenient foods
- Acceleration of e-commerce growth and omnichannel retail



**Critical need for resilience and adaptability:
Urban food logistics as a key driver for building resilience**

Key challenges to the development of efficient urban food logistics



Disrupted supply chains: (i) overreliance on distant suppliers (ii) regional linkages (iii) insufficient buffer stocks and limited alternative sourcing mechanisms.



Polarizing consumer demand: two extremes: (i) budget-conscious shopping (ii) premium purchases – Pressure on both small traditional vendors and modern retailers to adapt procurement, pricing, and distribution models.



Environmental concerns: E-commerce (i) intensified urban congestion, (ii) air pollution, and (iii) single-use packaging waste. Lack regulations and infrastructure to mitigate externalities.



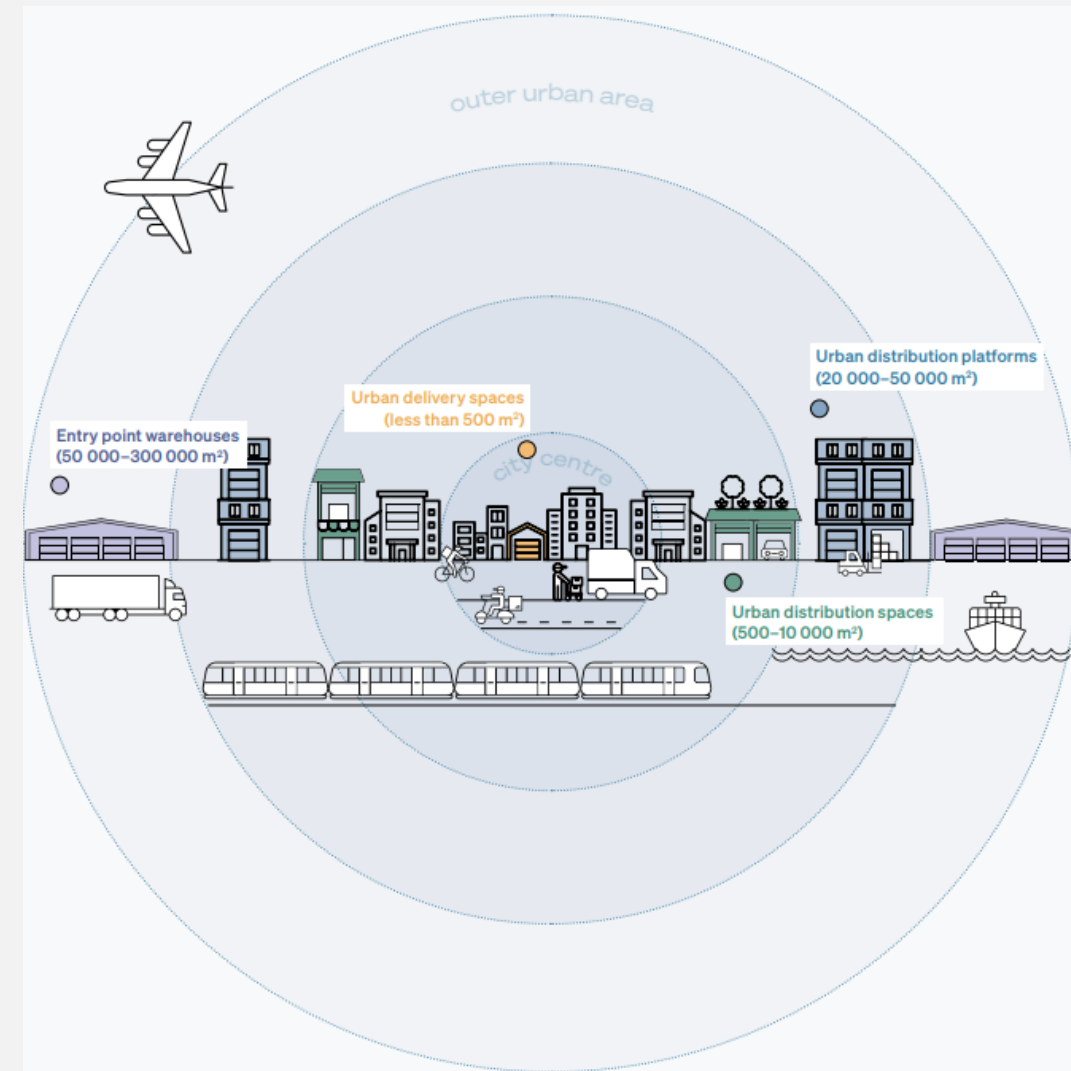
Urbanization and infrastructure needs: Rapid urban growth requires modernized infrastructure to support efficient food logistics and preserve a rural-urban continuum



Data and policy gaps: (i) Lack of comprehensive, real-time data on food flows and logistics performance (ii) Outdated zoning laws and fragmented regulations hinder rapid adaptation.

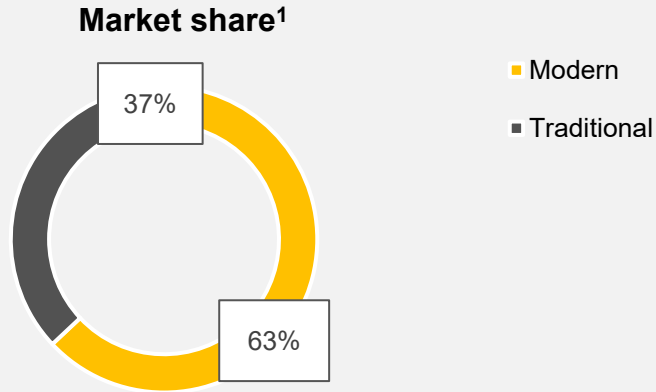
Strategic policy and investment responses

- ✓ **Strengthening the urban-rural continuum:** Protecting peri-urban agriculture zones and fostering short food supply chains reduces dependency on distant sources.
- ✓ **Upgrading logistics infrastructure:** Integrated planning of warehouses, distribution centres, and last-mile nodes is essential. Importance of shared use of facilities and services
- ✓ **Promoting sustainable last-mile delivery:** Incentivizing electric vehicles, cargo bikes, and pedestrian couriers within low-emission zones can curb pollution.
- ✓ **Digital innovation and data sharing:** Real-time tracking of shipments, predictive analytics for demand forecasting, and digital marketplaces for small vendors improve system visibility.
- ✓ **Inclusive policy and governance:** Engagement platforms bring together government, businesses, civil society, and consumer groups to co-design solutions.

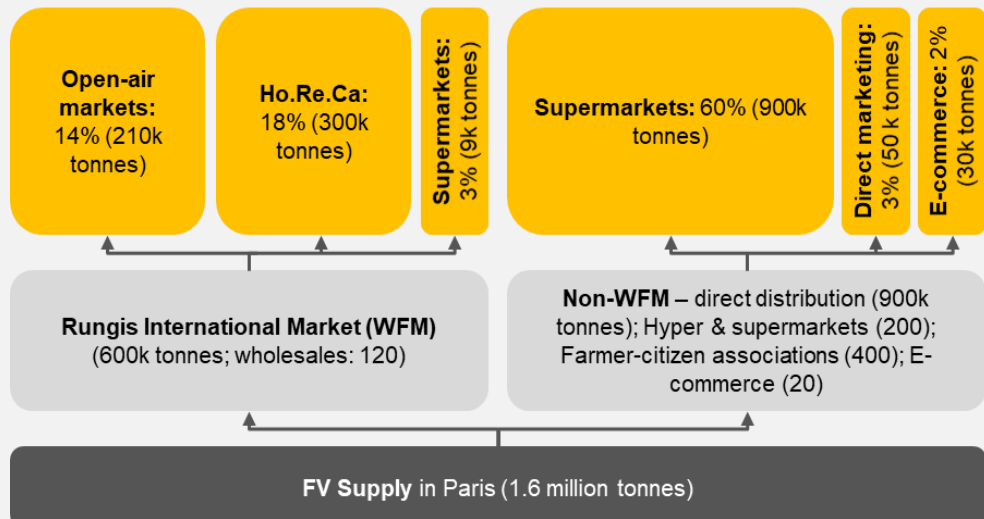


Example city case study Paris

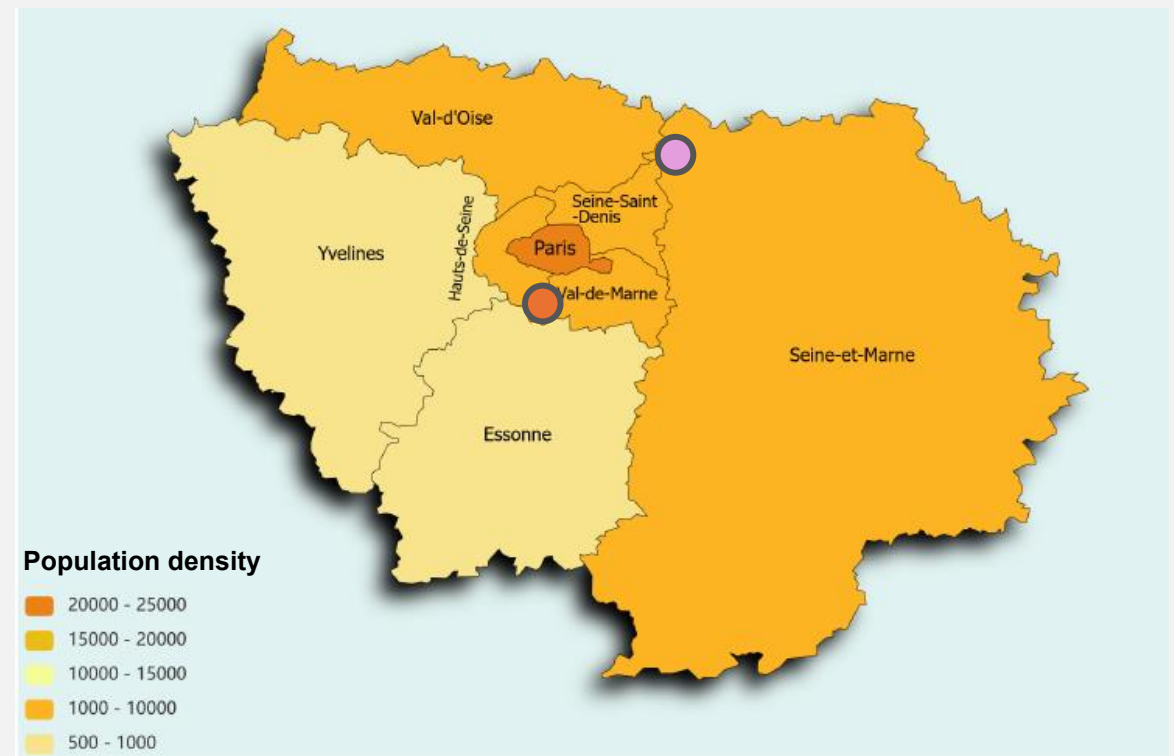
Market shares of distribution channels



Main FV distribution channels in Paris²



Main distribution flows and infrastructure





Example city case study Paris

Projet Agoralim



Hotel logistique La Chapelle



Key areas of investment for sustainable and efficient urban food logistics

Connect with the city's green belt to diversify urban food supply with local, shorter-haul alternatives

- ✓ Protect farmland and farming
- ✓ Improve regional producers' access to local markets
- ✓ Upgrade WFM
- ✓ Support the development of local logistics cost-saving solutions
- ✓ Encourage private investments

Transform urban spaces with emerging logistics infrastructure and promote collaboration and asset sharing within urban food logistics

- ✓ Improve the connectivity between existing urban logistics facilities
- ✓ Repurpose public spaces
- ✓ Promote shared last-mile delivery services
- ✓ Improve competitiveness and diversify WFMs' clientele
- ✓ Invest in the interconnectivity between food logistics facilities

Convene the ecosystem stakeholders for participatory food policy planning and raise stakeholders' awareness

- ✓ Support multilevel multi-actor participatory mechanisms
- ✓ Inform decision making bodies
- ✓ Conduct awareness-raising events among consumers

Monitor, report and verify the impacts of urban food logistics; legislate and regulate to support urban food logistics transformation

- ✓ Prepare an inventory of public and private logistics spaces
- ✓ Designate zero or low-emission delivery zones in the city
- ✓ Invest in municipal staffing and technological capacity
- ✓ Adopt public procurement policies in support of urban food logistics transformation



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THANK YOU





WORLD CAFÉ

Participants sit in 5 different tables in small groups. Each table has a specific topic. Discussions happen in multiple timed rounds (40 minutes each). After each round, participants move to a new table. Each group will cover 2 tables.

- **Session 1: 10:30 - 11:10**
- **Session 2: 11:10 - 11:50**
- **Common restitution at 11.50**

TABLE 1

Infrastructure &
Cold Chain
Modernization

TABLE 2

Packaging,
Crating,
and Waste Handling

TABLE 3

Food Value Chain
Efficiency & Retail
Innovations

TABLE 4

Urban Production
& Shorter Food
Chains

TABLE 5

Governance,
Financing &
Coordination for
Sustainability