FARM FOUNDATION® FORUM

GLOBAL AG TRADE AND SUSTAINABILITY: GAPS AND OPPORTUNITIES

MAY 14, 2024

Today's webinar is made possible by a grant from Farm Credit

#FarmFoundationForum
MARTHA KING

Vice President, Programs and Projects
Farm Foundation
MEET FARM FOUNDATION
A 501(C)(3) NON-PROFIT AT THE INTERSECTION OF AGRICULTURE AND SOCIETY
Farm Foundation is an ACCELERATOR of practical solutions for agriculture.

We accelerate PEOPLE and IDEAS into ACTION
OUR MISSION AND VISION
GUIDE OUR WORK

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To build trust and understanding at the intersections of agriculture and society.

Vision:
To build a future for farmers, our communities and our world.
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Submit questions by clicking on the **Q&A Button** at the bottom of your screen.

Please **include your name and company** so questions may be contextually understood.

Due to **time limits**, we may not be able to ask all questions submitted.

This Forum is being recorded and will be posted on our website at [farmfoundation.org](http://farmfoundation.org) as well as the Farm Foundation **YouTube** channel.

Please take the **short survey** at the conclusion of the Forum.
The Advancing the Role of Trade and Agricultural Sustainability report
KATIE MCROBERT
Executive Director
Australian Farm Institute
AASF: an outcomes approach to ESG-aligned sustainability reporting
Structure should follow strategy, not vice versa.

**WHY**

- Purpose / passion / belief

**PURPOSE**

**HOW**

- Tech / process / system

**WHAT**

- Product / actions / tasks

**NEOCORTEX: Analytical**

**LIMBIC BRAIN:**

- Trust
- Behaviour
- ‘Gut’
Values-driven choices
How does this relate to sustainability reporting?

Analytic response gets overwhelmed!
Sustainability is **not marketing jargon.**

A sustainable farming business is one that’s here for the long haul – one that looks to future profitability, productivity and continued stewardship of resources.
Australian Agricultural Sustainability Framework

Demonstrating the economic, environmental and social sustainability of Australian agriculture
Australian Agricultural Sustainability Framework

Demonstrating the economic, environmental and social sustainability of Australian agriculture.
Informed by Australian sustainability information + related plans / local priorities

Harmonisation

Informed by global standards/reporting

Farmers/land managers provide input to inform sustainability objectives

Informed by market requirements for ESG / sustainability compliance + Govt incentive programs
Future-proofing Australian agriculture

WHY

Communication

Consumer confidence

Access to finance

Harmonise efforts

Social licence

Political capital

Trade facilitation
Australian Agricultural Sustainability Framework

Demonstrating the economic, environmental and social sustainability of Australian agriculture
**Biodiverse ecological communities are protected and enhanced.**

**AASF – P5.**

Biodiverse ecological communities are protected and enhanced.

**AASF criteria for this principle:**

C9. Farms support a diverse range of beneficial flora and fauna species

C10. Farm-related ecosystems are functioning and thriving

**Articulating PRINCIPLES (not prescribing practices)**

Note: this list includes examples of AASF principle & criteria alignment / relationship to Australian and international sustainability initiatives – it is not a complete list. Exclusion from this list does not reflect lack of alignment.
AASF – P11. Discrimination is not tolerated in an inclusive industry.

AASF criteria for this principle:

C24. Human rights are respected unequivocally
C25. Workplace diversity is valued and actively supported

Articulating PRINCIPLES (not prescribing practices)

| **Australian Beef Sustainability Framework** | Priority Area 9.2: “Diversity in the workforce” | MORE |
| **Australian Certified Organic** | 4.6.13 Operators shall provide their employees and contractors equal opportunity and treatment and shall not act in a discriminatory way. | MORE |
| **Behind Australian Grain** | Priority Area: Capacity & Leadership | MORE |
| **Cotton MyBMP** | WHS & HR: Workplace rights – a process is in place to ensure the fair treatment of employees | MORE |
| **GRI 13: Agriculture, Aquaculture and Fishing Sectors 2022** | Topic 13.14 Rights of indigenous people: This topic covers impacts on the rights of indigenous peoples; Topic 13.15 Non-discrimination and equal opportunity: This topic covers impacts from discrimination and an organization’s practices related to equal opportunity | MORE |
| **ISO13065:2015 Sustainability Criteria for Bioenergy** | Principle 5.3.2: Labour Rights - Respect labour rights (Criteria 5.3.2.4 - Working Conditions) | MORE |
| **ISO26000: Social Responsibility** | Human Rights, Discrimination & vulnerable groups | MORE |
| **Roundtable on Sustainable Biomaterials** | Principle 4: Biomaterial feedstock production operations shall not violate human rights or labor rights, and shall promote decent work and the well-being of workers. | MORE |
| **SAFA (FAO)** | S4: The enterprise pursues a strict equity and non-discrimination policy and pro-actively supports vulnerable groups. | MORE |
| **Sustainable Agriculture Initiative** | Working & Living Conditions: “An agricultural sector that ensures human rights are respected, by providing a pleasant working environment, free from forced or the worst forms of child labour, any type of discrimination and disciplinary practices, work is appropriately compensated and managed, and access to suitable sanitary, housing and transportation infrastructures and services for farmers, farm workers and their families.” | MORE |
| **UN SDG 4 – Quality Education** | Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all | MORE |
| **UN SDG 5 – Gender equality** | Achieve gender equality and empower all women and girls | MORE |

Note: this list includes examples of AASF principle & criteria alignment / relationship to Australian and international sustainability initiatives – it is not a complete list. Exclusion from this list does not reflect lack of alignment.
WHY

- Mandatory climate-related financial disclosures
- Farmers push for public release of community engagement report
- Forget military service, Australia needs mandatory farm stints
- Recent changes in seasonal conditions have affected the profitability of Australian farms
- Policy position statement
- Sophie has secretly taken over 200 animals from farms. This is why she’s risking prison
Shared values
Future-proof Australian agriculture
MARK TITTERINGTON

Co-founder and Director, Forum for the Future of Agriculture
Co-Head, Global Sustainability & Public Affairs, Indigo
Trade and sustainability
Farm Foundation Forum
May 14, 2024
EU Green Deal is key to understanding the EU’s approach to agriculture and trade
Farm to Fork Strategy at the heart of the Green Deal...
... and has informed a blueprint for sustainable agriculture markets

- Exerting strategic leverage
- Integration of policies for sustainable impact
- Exercising leadership
Implementation of Farm to Fork has encountered... turbulence?
Leading to the Strategic Dialogue on Agriculture...

“We must work together with the men and women in EU farming to secure our food supply for the future. Our farmers face mounting challenges: that is why we want to launch a strategic dialogue on the future of EU agriculture. I am convinced that agriculture and protection of the natural world can go hand in hand. We need both.”

— Ursula von der Leyen, President of the European Commission, State of the Union 2023
... as European elections loom large!
Implications for direction of policy?
Thank you!
TYLER MCCANN
Managing Director,
Canadian Agri-Food Policy Institute
Global Ag Trade and Sustainability
Gaps and Opportunities
The Challenge of Perception
The Challenge of Perception

Food System Transformation
National Index on Agri-Food Performance

Canada’s 1st agri-food sustainability index

What it is:
✓ A systems view of sustainability
  • Holistic: 20 indicators across 4 blocks of sustainability
  • Sector-wide: Consolidated national picture from production to retail *
  • Relevant: Reflects key Cdn/global agri-food goals & many ESG factors

✓ A framework to align & step-up disclosure
  • Inspire: Defines how agri-food ought to be measured (seeks outcomes-based metrics)
  • Transparent: Report on areas of leadership, needed progress & the data gaps
  • Leverage: A tool to enhance trust, enable competitiveness & inform policy, research

What it is not:
• Not prescriptive
• Not scoring producers, companies or governments
• Not comparative (to other countries)
• Not measuring consumer diets

* Index measures largely what is directly related to and in the control of production (all forms of agriculture and fisheries/aquaculture), processing and food retailing, and bioproducts sectors
National Index on Agri-Food Performance

✓ 4 sustainability blocks
✓ 20 indicators
✓ Well over 130 metrics (not shown)

www.agrifoodindex.ca
Sustainability Policy In Canada

The Prime Minister’s mandate letter to the Minister of Agriculture and Agri-Food directs the minister to help the sector address climate change and to support the development of clean and sustainable technology.

The Pan-Canadian Framework on Clean Growth and Climate Change identifies the need for the federal, provincial, and territorial governments to work together to protect and enhance agricultural carbon sinks.

A Healthy Environment and a Healthy Economy, Canada’s strengthened climate plan, sets a national fertilizer emission reduction target of 30% below 2020 levels by 2030.

The Fall Economic Statement calls for the development of an agri-environmental strategy.

The 2030 Emissions Reduction Plan includes the Agricultural Clean Technology program, the On-Farm Climate Action Fund, and the Living Labs program.

Faster and Further: Canada’s Methane Strategy: agriculture is critical to reducing methane emissions. The strategy listed AAFC’s climate change mitigation programs among the measures that are expected to contribute to methane reductions.

The Sustainable Canadian Agricultural Partnership is a 5-year federal, provincial, and territorial agriculture policy framework, with climate change and the environment as a priority area.
### Programs and departmental activities (fiscal years)

<table>
<thead>
<tr>
<th>Programs and departmental activities</th>
<th>Federal allocated funding ($)</th>
<th>Est permanent emission reductions in 2023 (Mt CO2 eq)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Living Labs (2021–22 to 2030–31)</td>
<td>$185 million</td>
<td>1.00</td>
</tr>
<tr>
<td>On-Farm Climate Action Fund (2021–22 to 2027–28)</td>
<td>$704 million</td>
<td>1.61</td>
</tr>
<tr>
<td>Agricultural Clean Technology program (2021–22 to 2028–29)</td>
<td>$471 million*</td>
<td>0.77</td>
</tr>
<tr>
<td>SCAP— Programs supported under the FPT policy framework (2023–24 to 2027–28)</td>
<td>$63 million (federal share)</td>
<td>0.83</td>
</tr>
<tr>
<td>Resilient Agricultural Landscape Program (2023–24 to 2028–29)</td>
<td>$150 million (federal share)</td>
<td>3.50</td>
</tr>
<tr>
<td>Efforts toward the government target for fertilizer emission reductions (by 2030)</td>
<td>Partially funded**</td>
<td>3.50</td>
</tr>
<tr>
<td>Efforts toward the government target for methane emission reductions (by 2030)</td>
<td>None identified</td>
<td>None identified</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td><strong>$1.57B</strong></td>
<td><strong>11.21</strong></td>
</tr>
</tbody>
</table>

### Findings
- The department had no strategy to meet its expected contributions to reductions of greenhouse gas emissions.
- The department had limited results and poor results measurement.

### Recommendations
- “The department should finalize and implement a sustainable agriculture strategy...”
- “minimize administrative lag times, enable longer-term project planning, and support the continuity and sustainability of its climate change mitigation programs...”
- “achieve the expected reductions of greenhouse gas emissions by 2030, and help achieve greater reductions to 2050, AAFC should...”
- “enable the accurate, timely, and transparent assessment of results and the ability to roll up greenhouse gas emission reduction data across its projects and programs, AAFC should implement a results monitoring framework...”
The Carbon Tax

How carbon pricing works

Agriculture sector

Pollution pricing... exempts all gasoline and diesel... as well as biological emissions so that about 97% of on-farm emissions are not subject to the price on pollution. As well, farmers... can receive a refundable tax credit to help them transition to lower-carbon ways of farming...
Not all food is equal

More sustainable vegetable oil: Balancing productivity with carbon storage opportunities [Link]

Country-specific dietary shifts to mitigate climate and water crises [Link]
The Trade Reality

Perspectives differ, but...

- Trade continues to increase, but growth is slowing
- Share of production traded is increasing
- # of net food exporters is shrinking

Source: OECD
Trade

Production is diversified, but exports are concentrated...

Source: FAOSTAT
Produced by CAPI
Trade and Sustainability

Intersection or Collision...

‘Unfair competition': French farmers up in arms over EU free-trade agreements

Toward More Equitable and Sustainable Trade in Food and Agriculture

Carbon border adjustments pending

Policy was first mentioned in the 2020 climate plan, and it now seems it will be a reality

Exploring Non-Tariff Barriers in Canada Asia Pacific Trade

Published: October 4, 2021
Authors: Anastasia Ukhina, Charlotte Atkison, No Shira Ronstein, Rachel Davies

Changing Times Require a New Approach to Securing the Future Prosperity of Canada’s Agri-food Sector
John Weekes, CAPI Board Member

With the right political leadership Canada could take the lead in creating a new group dedicated to the twin objectives of removing remaining impediments to agricultural trade and ensuring that efforts to feed the world are done in an environmentally sustainable way.
An increasingly common challenge and opportunity

Key Conclusions

• Enhancing food systems and trade through outcomes-based approaches to sustainability

• Intensify global cooperation in support of coherent policies and a global framework for sustainable agriculture.

• Optimize trade to make agriculture sustainable and profitable.

• Harnessing data and technology to transform the way we grow and trade food.
Outcomes-based approaches

Ideas and Areas to Explore

• **Create a platform to advance the dialogue and share information** to better understand how trade and sustainability interact, and identify policy efficiencies, pilot programs, etc.
  
  (1) Build on the work of the OECD to gather data and identify information gaps.

• Research and **identify existing** principles and standards that could be used as models to develop an outcome-based framework for sustainable agriculture.

• Build on G20 Declarations to develop a **shared vision** of the intersection of trade and sustainable agriculture.

• Facilitate **public-private dialogues** with international bodies (WTO, OECD, FAO) to explore the idea of a **global trade policy framework** integrating sustainability outcomes as well as **principles, standards and clear, simple metrics**.
  
  (1) As a pilot, start with one or two commodities where work or data already exists (wheat, cocoa, coffee).

“**We need outcome-based policies and a definition of sustainability as well as metrics, so we develop measurable policies. We need to be factually correct.**”

- Workshop participant
The intersection of trade and sustainability can be a wicked problem or a positive opportunity, either way we need to work together to solve it!
DEVRY BOUGHNER VORWERK

Founder and CEO,
DevryBV Sustainable Strategies
Trade and Agricultural Sustainability: Finding Truth, Synergy, and Accountability in Global Public Policy.

Presented by Devry Boughner Vorwerk
Founder + CEO
May 14, 2024
“Ground Truth” of Public Policy.

-- Truth is guiding principle of sound public policy.
-- “Ripple effect” of subsidies, border measures, tax incentives, regulatory reporting requirements, emissions standards, etc.
-- Take long-term perspective on outcomes and impact.
-- It’s difficult to address in the moment, but it’s important for viability of a sustainable food system.
Four general conversation points for today’s discussion.

1. A Trip Down Memory Lane.

2. The “Spaghetti Pot” Is Overflowing.

3. OSFA does not work for SMEs

A Trip Down Memory Lane.

Remember Red, Yellow, and Green Box? Blue Box?

Market Access, Export, and SPS Commitments?

Marrakesh Agreement?
“Recognizing that their relations in the field of trade and economic endeavour should be conducted with a view to raising standards of living, ensuring full employment and a large and steadily growing volume of real income and effective demand, and expanding the production of and trade in goods and services, while allowing for the optimal use of the world’s resources in accordance with the objective of sustainable development, seeking both to protect and preserve the environment and to enhance the means for doing so in a manner consistent with their respective needs and concerns at different levels of economic development,...”
The “Spaghetti Pot” is Overflowing.

1995 Jagdish Baghwati “spaghetti bowl effect.”

Lack of accountability to commitments.

Plethora of uncoordinated subsidies, tax breaks...
# At a glance: international climate & sustainability disclosure requirements

## KEY:
- **Mandatory CRD in force**
- **Mandatory CRD proposed**

## SECTION OVERVIEW

The global regulatory landscape with respect to ESG reporting is changing at pace. More than 60% of world GDP is now subject to mandatory climate-related disclosures (CRD) measures, either proposed or already in force. This page provides an at-a-glance overview of measures in key markets. These obligations could affect New Zealand companies directly, depending on in-market presence, or indirectly through the supply chain requirements of their customers in those countries. In addition, there is widespread uptake of voluntary reporting under initiatives such as the Task Force on Nature-related Financial Disclosures (TNFD).

### UK & EUROPE

- **United Kingdom**
  - Mandatory CRD (since 2022)
  - Emissions reporting requirements
  - Sustainability Disclosure Requirements (since 2023)
  - Modern slavery reporting (since 2015)

- **European Union**
  - Corporate Sustainability Reporting Directive (since 2023)
  - Corporate Sustainability Due Diligence Directive (likely from 2026)

### ASIA PACIFIC

- **India**
  - Listed issuer ESG disclosures (phased in since 2022)

- **China**
  - Listed issuer ESG disclosures (from 2024)
  - Emissions reporting requirements (various since 2023)

- **Korea**
  - Emissions reporting (amended 2021)
  - ESG disclosure (proposed from 2026)
  - Human rights in supply chain reporting (from 2024)

- **Taiwan**
  - Emissions reporting requirements (since 2021)
  - Listed issuer ESG disclosures (since 2023)

- **Japan**
  - Emissions reporting (since 2023)
  - Listed issuer ESG disclosures (since 2023)
  - Sustainability disclosures (proposed from 2023)

### HONG KONG & SINGAPORE

- **Hong Kong**
  - Listed issuer ESG disclosures (since 2023)
  - CRD (from 2026)

- **Singapore**
  - Emissions reporting (various requirements since 2022)
  - Listed issuer ESG disclosures (since 2023)
  - CRD (from 2026)

### MALAYSIA

- **Malaysia**
  - Listed issuer ESG disclosures (since 2023)
  - Enhanced CRD and sustainability disclosures (proposed from 2025)

### THAILAND & VIETNAM

- **Thailand**
  - Listed issuer ESG disclosures (since 2021)

- **Vietnam**
  - Listed issuer ESG disclosures (since 2023)
  - Emissions reporting (since 2022)

### PHILIPPINES

- **Philippines**
  - Listed issuer ESG disclosures (since 2025)

### AUSTRALIA

- **Australia**
  - CRD (proposed from 2025)
  - Modern slavery reporting (since 2018)
  - Emissions reporting requirements (since 2017)

### NORTH AMERICA

- **United States**
  - CRD (rule finalized in 2024; currently on hold)
  - California Climate Accountability Package, including emissions reporting, CRD and carbon offset disclosures (from 2026)
  - New York (proposed) and California (since 2010) supply chain due diligence requirements

- **Canada**
  - CRD for financial institutions (from 2024)
  - Sustainability disclosures (from 2025)
  - Human rights supply chain reporting (from 2024)
CBAM definitive regime (from 2026)

EU importers of goods covered by CBAM will register with national authorities where they can also buy CBAM certificates. The price of the certificates will be calculated depending on the weekly average auction price of EU ETS allowances expressed in €/tonne of CO₂ emitted.

EU importers will declare the emissions embedded in their imports and surrender the corresponding number of certificates each year.

If importers can prove that a carbon price has already been paid during the production of the imported goods, the corresponding amount can be deducted.


“Right now, our existing trade policies and the international rules that govern them don’t pay enough attention to the emissions embodied in tradeable goods … Instead, we need a smart, 21st century-approach to climate and trade policy that launches a “race to the top” for climate action.”

John Podesta, Columbia Global Energy Summit, April 16, 2023

https://ww2.arb.ca.gov/resources/documents/cap-and-trade-program-allowance-distribution-factsheet
The Number of WTO Members Failing to Report Subsidies Has Grown

WTO members by subsidy notification status

Source: World Trade Organization.

Chart found at: https://www.hinrichfoundation.com/research/how-to-use-it/rethinking-international-rules-on-subsidies/
OFSA Does Not Work for SMEs.

Small and Midsized Enterprises, especially need extensive support.

Public policy must facilitate (not deter) capital allocation to greatest areas of need.

Requires diversification of policy options and harmonization of standards.
Smallholder farms produce one-third of the world’s food

The cumulative share of the world’s agricultural land, crop production and food supply, broken down by farm size.

### Agricultural land, in hectares

<table>
<thead>
<tr>
<th>Farm Size</th>
<th>Share of Land</th>
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<tbody>
<tr>
<td>Up to 1 ha</td>
<td>12%</td>
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<tr>
<td>Up to 2 ha</td>
<td>24%</td>
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<td>Up to 5 ha</td>
<td>32%</td>
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<td>Up to 10 ha</td>
<td>40%</td>
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<td>Up to 20 ha</td>
<td>49%</td>
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<td>Up to 50 ha</td>
<td>57%</td>
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<td>Up to 100 ha</td>
<td>65%</td>
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<tr>
<td>Up to 200 ha</td>
<td>72%</td>
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<tr>
<td>Up to 500 ha</td>
<td>80%</td>
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<td>Up to 1000 ha</td>
<td>88%</td>
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<tr>
<td>All sizes</td>
<td>100%</td>
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</tbody>
</table>

Smallholder farms (farms less than two hectares):...use 24% of agricultural land

### Crop production, in kilocalories

(used for food, animal feed and fuel)

<table>
<thead>
<tr>
<th>Farm Size</th>
<th>Share of Production</th>
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</thead>
<tbody>
<tr>
<td>Up to 1 ha</td>
<td>12%</td>
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<tr>
<td>Up to 2 ha</td>
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<td>88%</td>
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<tr>
<td>All sizes</td>
<td>100%</td>
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</tbody>
</table>

Smallholder farms (farms less than two hectares):...to produce 29% of crops

<table>
<thead>
<tr>
<th>Farm Size</th>
<th>Share of Crop Production</th>
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</thead>
<tbody>
<tr>
<td>Up to 1 ha</td>
<td>12%</td>
</tr>
<tr>
<td>Up to 2 ha</td>
<td>24%</td>
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<tr>
<td>Up to 5 ha</td>
<td>32%</td>
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<td>88%</td>
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<tr>
<td>All sizes</td>
<td>100%</td>
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</tbody>
</table>

Half of crop production comes from farms less than 10 hectares

### Food supply, in kilocalories

(crops used for human food only)

<table>
<thead>
<tr>
<th>Farm Size</th>
<th>Share of Food Supply</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up to 1 ha</td>
<td>15%</td>
</tr>
<tr>
<td>Up to 2 ha</td>
<td>32%</td>
</tr>
<tr>
<td>Up to 5 ha</td>
<td>46%</td>
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<tr>
<td>Up to 10 ha</td>
<td>55%</td>
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<tr>
<td>Up to 20 ha</td>
<td>59%</td>
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<td>Up to 50 ha</td>
<td>63%</td>
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<td>Up to 100 ha</td>
<td>69%</td>
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<tr>
<td>Up to 200 ha</td>
<td>85%</td>
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</table>

Half of food supply comes from farms less than 10 hectares

Half of crop production comes from farms less than 10 hectares

Sources:

Licensed under CC-BY by the author Hannah Ritchie.
Agriculture Has Attracted Very Little Climate Finance

Global climate finance flows, average for 2021-2022

- Agriculture, forestry, other land use and fisheries

Source: Climate Policy Initiative

Bloomberg
The “payfor” for offsets is insets.

Modeling is not measurement.

Accurate measurement = robust markets.
International Effort to Restore Global Trade Negotiations with Agriculture and Climate Focus.

Sustainable Business Growth and Global Food Security.

Melding (not welding) of Trade, Ag, Energy, + Finance, and Sustainability Agendas.
Thank you.
THANK YOU

Support our Mission
Become a Friend of Farm Foundation today!

farmfoundation.org/friends

#FarmFoundationForum
Farm Family Wellness Alliance Webinar

Tuesday, May 21, 2024
10 a.m. CT on Zoom

The webinar will cover the following and more:

- What is the Farm Family Wellness Alliance?
- How do you access free services?
- Who should sign up?