



# FARM FOUNDATION® FORUM

## BUILDING A SUSTAINABLE INTERNATIONAL AGRICULTURE TRADE FRAMEWORK

**FEBRUARY 6, 2025**



FARM CREDIT

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**#FarmFoundationForum**

**Farm  
Foundation®**  
*Accelerating people & ideas*



# TIM BRENNAN

Vice President, Programs and Strategic Impact  
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

## **Mission:**

**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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# IMPORTANT NOTES

- 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** as well as the Farm Foundation **YouTube** channel.
- Please take the **short survey** at the conclusion of the Forum.





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MODERATOR  
SHARI ROGGE-FIDLER

President and CEO  
Farm Foundation

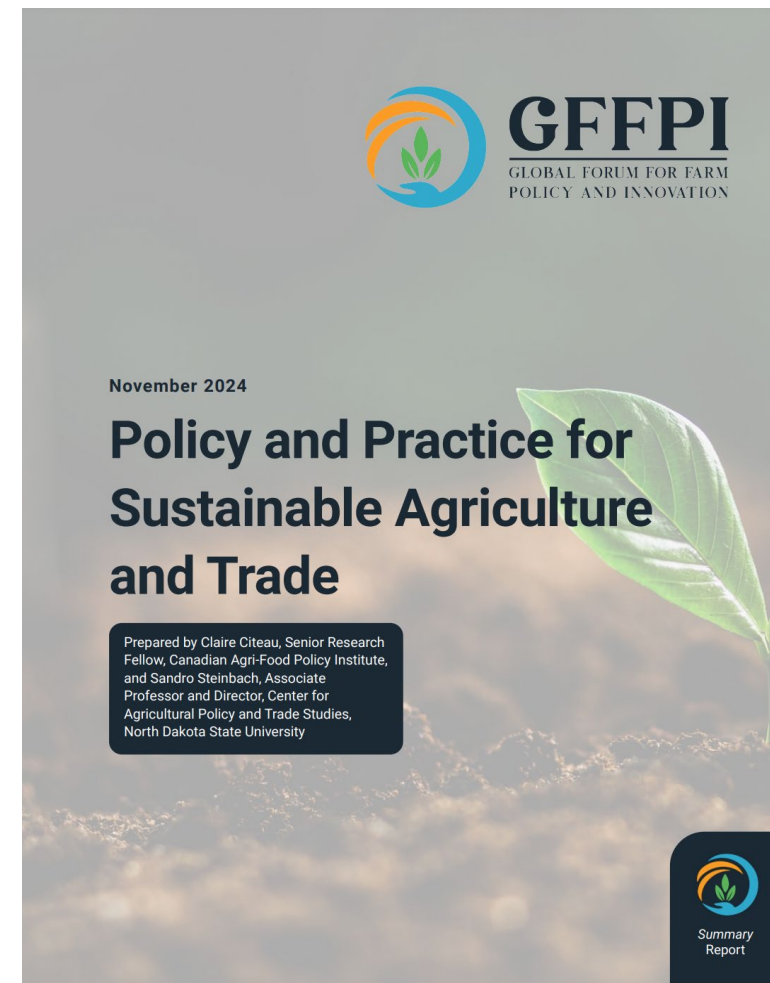




# GFFPI'S WORKSHOP AND RECENT PAPER - OPPORTUNITIES

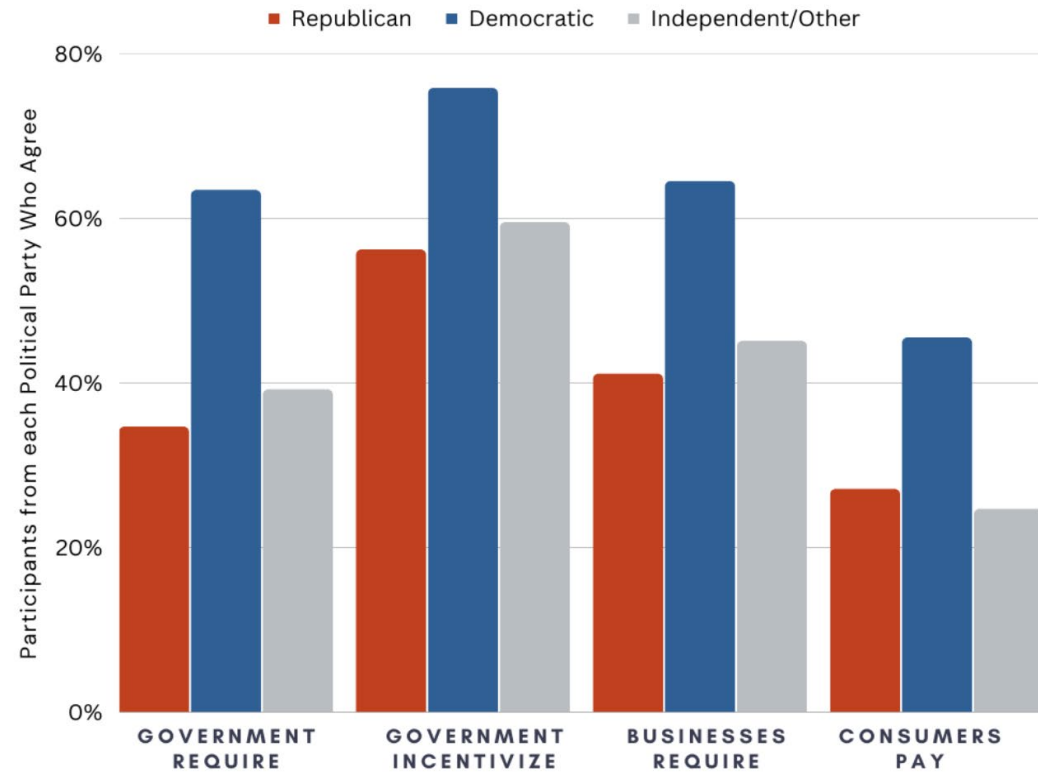
Key findings and ideas to explore include:

- Integrate **local conditions** to avoid unintended consequences
- Adopt an **outcome-based approach** to sustainability, starting with soil health, water, biodiversity and carbon measures as benchmarks
- Develop a **Sustainable Agriculture Trade Framework** with clear definitions, science-based standards and guiding principles
- Strengthen **international cooperation** to promote policy coherence
- Invest in globally accepted **metrics** and data management for agricultural sustainability
- **Prioritize innovation** and technology in sustainable agriculture
- **Engage farmers** in policy development
- **Reframe sustainability as an opportunity**



# US VIEWS ON SUSTAINABILITY – CARROTS NOT STICKS

Figure 5: Proportion of Participants Who Support Different Ways to Encourage More Sustainable Food Production, Across Political Parties (May '22-Feb '23)



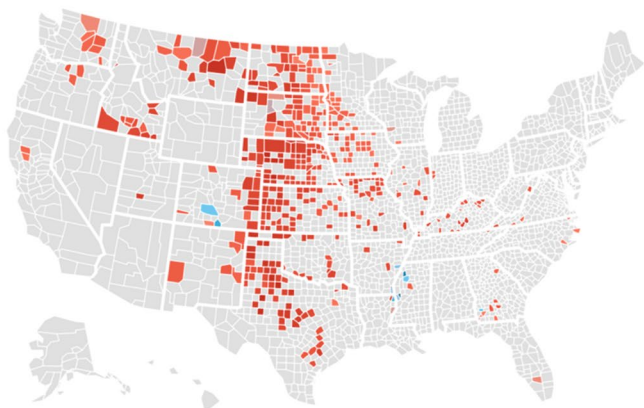


# US FARMERS – AG COUNTIES SUPPORT NEW ADMINISTRATION, YET HAVE TRADE CONCERNS

## farming counties

This map shows the nation's 444 farming-dependent counties and President-elect Donald Trump's share of the vote in each. Trump won all but 11 of these counties in the 2024 presidential election.

31% 50% 96%



*The USDA has designated 444 counties as farming-dependent, which are counties where 25% or more of the average annual labor and proprietors' earnings were derived from farming, or 16% or more of jobs were in farming.*

Map: Ben Felder - Investigate Midwest • Source: [USDA and preliminary 2024 election results](#) • [Get the data](#) • Created with [Datawrapper](#)

## US Farmer Views on Trade:

Broadly, US producers prefer market payments over government payments, but need one or the other.

Trade is the top concern for producers, over crop insurance. Purdue, Feb 2025 survey.

American Farm Bureau January 2025 priorities include:

Support for US-Mexico-Canada Agreement review for more opportunities.



# MARK TITTERINGTON

Co-founder and Director  
Forum for the Future of Agriculture



# **Building a sustainable international agri-trade framework**

Nexus of sustainability, innovation and trade

A perspective from Europe

Farm Foundation webinar

February 6<sup>th</sup>, 2025



# Stimulating the debate

## Strategic Dialogue on the Future of Agriculture

- Launched in January 2024
  - included stakeholders from across the agri-food chain, NGOs, financial institutions and academia
- Addressed several key questions:
  - How to best support our farmers and rural communities, including with a fair standard of living?
  - How can we support agriculture within the boundaries of our planet and its ecosystem?
  - How can we make better use of the opportunities offered by knowledge and technological innovation?
  - How can we promote a bright and thriving future for Europe's food system in a competitive world?
- Declared consensus coupled with many encouraging elements give cause for optimism but ambiguities and challenges remain
- Final report published in September 2024





# Key recommendations in the final report

- Develop a new **sustainability benchmarking system** for agri-food
  - harmonize methodologies for on-farm sustainability assessment
  - common objectives, principles and criteria
  - clearly established baselines with monitoring & verification tools
- Better access to and use of **knowledge & innovation**
  - increased investment in partnerships and research
  - sharing knowledge & skills
  - streamlining regulatory procedures and market access
  - leveraging opportunities created by bio-economy & digitization of ag
- Prepare a ‘fit for purpose’ **Common Agriculture Policy (CAP)**
  - better target income support at those who most need it
  - eco-system & animal welfare services properly incentivized and linked to quantifiable outcomes
- **Finance the transition**
  - establish Agri-Food Just Transition Fund
  - mobilize public & private capital
- Review **EU’s trade agreement approach**



# New EU Agri-Food Commissioner – towards a new vision



**Christophe Hansen**

**Commissioner-designate for Agriculture and Food**

Dear Christophe,

The Commission we will serve in together will be called upon to make choices that will shape our Continent and our Union for years and decades to come. In a time of great global instability and great expectations of Europeans, we must live up to that responsibility. **We must deliver and lead from the front**, working closely with the people and regions of Europe and the parliaments, governments and institutions that serve them.



FORUM FOR THE FUTURE OF AGRICULTURE RENEWS ITS CALL TO ACTION IN SUPPORT OF THE EMERGING VISION FOR THE TRANSFORMATION OF THE AGRI-FOOD SYSTEM

Dear Commissioner,

On behalf of the Forum for the Future of Agriculture, please accept our congratulations on your appointment and our best wishes for your term of office. Over the coming five years, there will be many challenges but also opportunities in the quest to make the agriculture and food system in Europe more resilient, competitive, sustainable, climate smart and nature positive. Through this letter and our activities, we hope to contribute to the development and implementation of your vision for addressing

- Christophe Hansen is new Commissioner for Agriculture & Food
  - Necessity to draw on and respond to outcome of the Strategic Dialogue
  - President von der Leyen's Mission Letter requires a **new vision for the future of EU agriculture**
  - ❖ Forum for Ag provided input to the new vision focused on benchmarking system, innovation and financing transition
  - Expected to be published before end March
    - will define course of action for next five years but...
    - ...until it is published and given state of flux in geo-politics hard to judge impact that EU approach to sustainability will have on trade
- **Personal view: EU will want to work with 'like-minded' partners but (like others) will use market access leverage where necessary**



**Thank you!**





# TYLER MCCANN

Managing Director  
Canadian Agri-Food Policy Institute (CAPI)





# CAPI

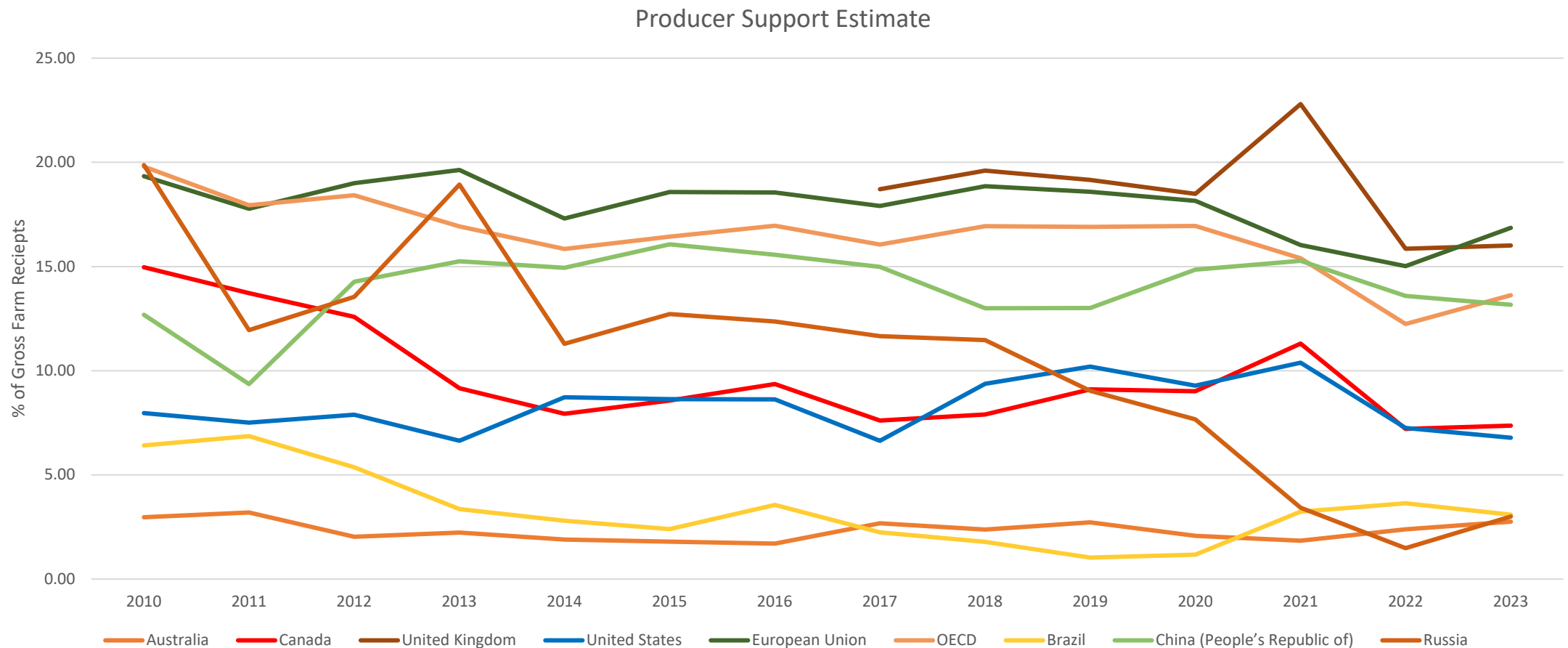
THE CANADIAN AGRI-FOOD  
POLICY INSTITUTE

## Agriculture Trade

A Canadian Perspective

# Trade is a Good Thing

## Trade helps ensure we are playing on a level playing field





# Trade is a Good Thing

**It shares resources and builds on each others advantages**



provides



- 95% of our phosphate supply (46% of your exports)
- 54% of our nitrogen fertilizer



provides



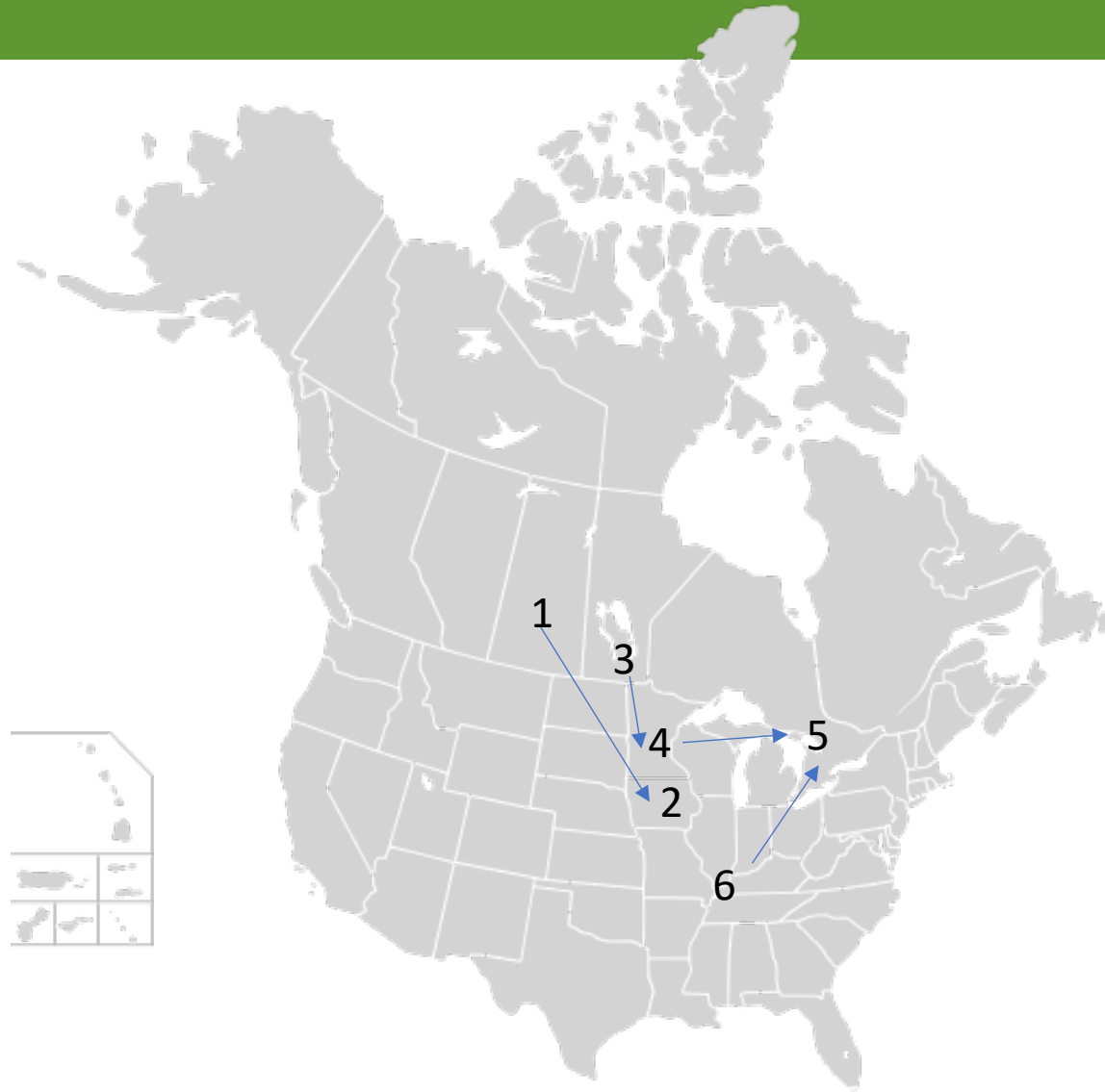
- 80% of your potash needs (40% of our production)
- 35% of our nitrogen exports

Source: Fertilizer Canada



# Canada US Trade is a Good Thing

1. Saskatchewan potash goes to Iowa to make corn grow
2. Iowa grows corn to feed pigs
3. Manitoba hog farmers raise weanlings that are finished in Iowa, Minnesota, North Dakota, South Dakota



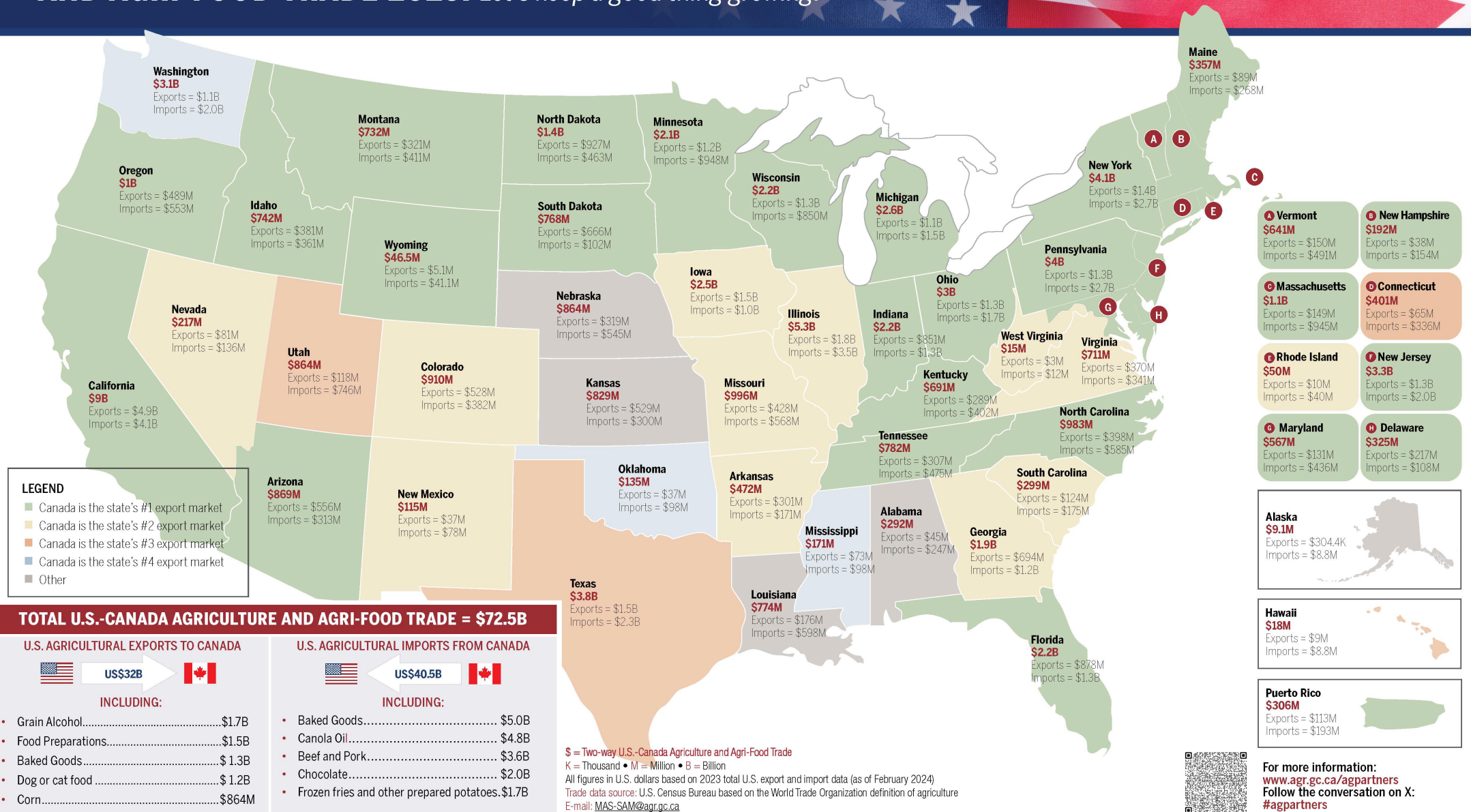
4. Hogs are slaughtered in Minnesota and sent to consumers
5. Some of that pork feeds consumers in Ontario
6. Ontario consumers and businesses import another \$17B worth of agri-food products from the US



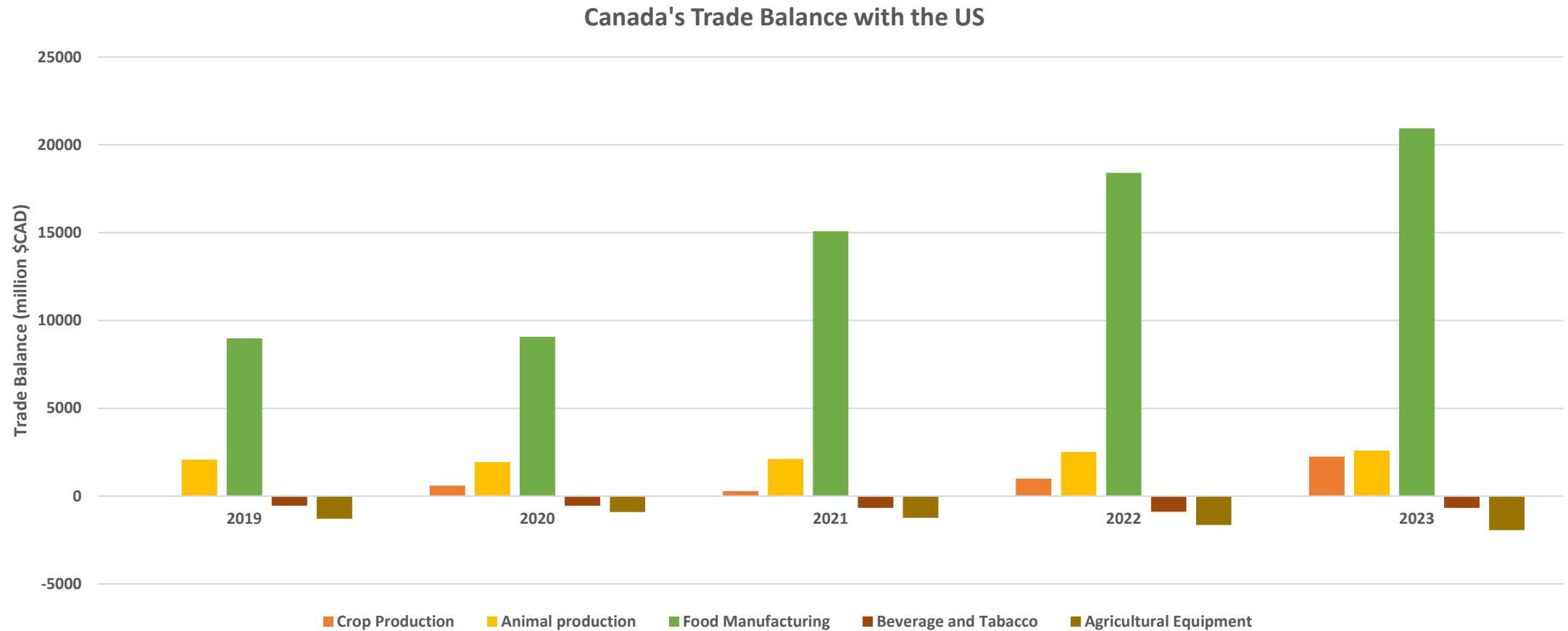


# UNITED STATES-CANADA AGRICULTURE AND AGRI-FOOD TRADE 2023: *Let's keep a good thing growing!*

© His Majesty the King in Right of Canada, as represented by the Minister of Agriculture and Agri-Food, 2023

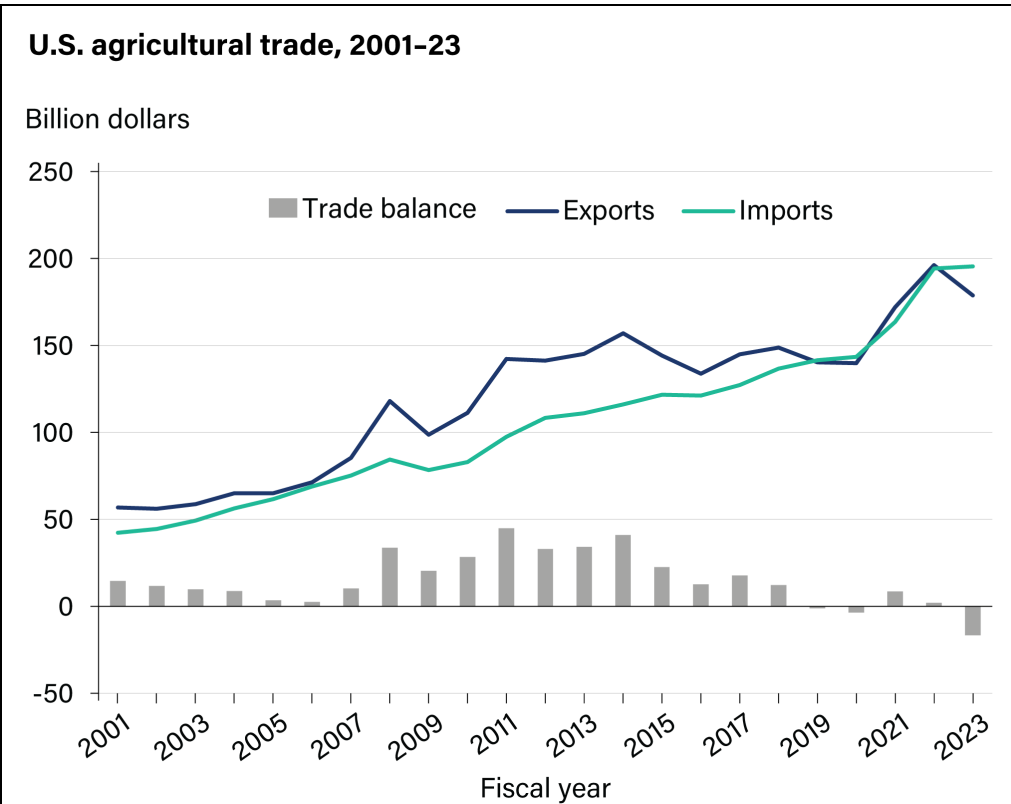


# US Trade Is Essential for Canada



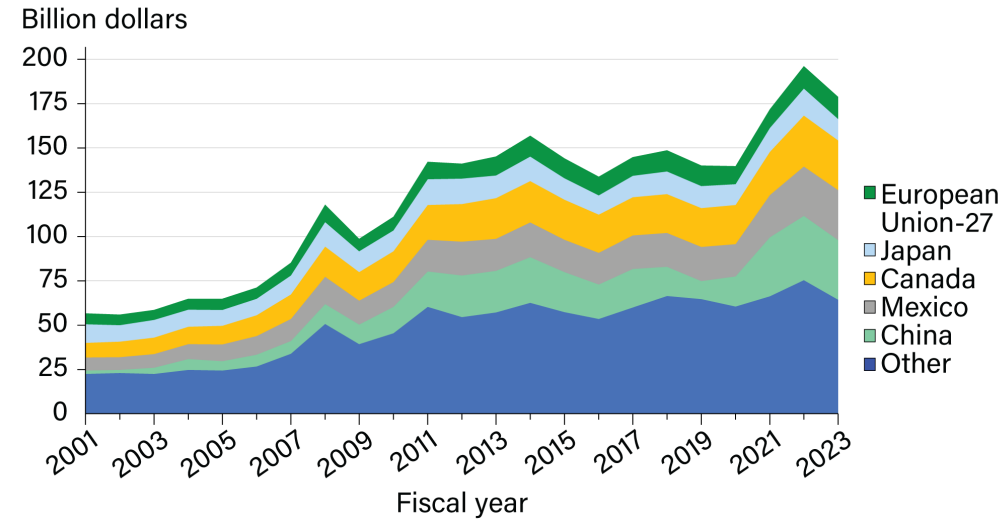


# But trade is important to the US too

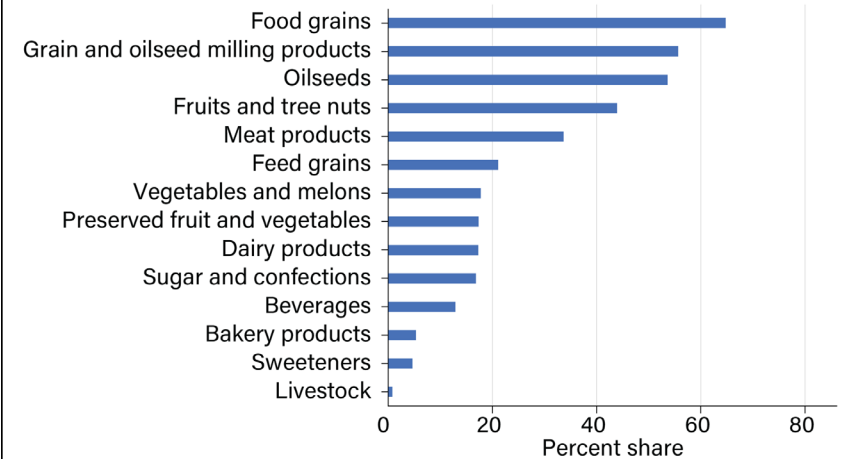


Source: USDA ERS

**Top five markets for U.S. agricultural exports, 2001-23**



**Export value share of production, 2013-22**



# Breaking Trade is a Bad Thing

POLITICS

## The only winner in U.S./Canada trade war ‘will be China’: Top Canadian diplomat in Boston warns

Updated: Jan. 31, 2025, 3:53 p.m. | Published: Jan. 31, 2025, 2:42 p.m.

FINANCIAL TIMES

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US trade + Add to myFT

Canada warns Donald Trump’s tariffs could leave US reliant on Venezuela’s oil

Foreign minister Mélanie Joly holds meetings in Washington in attempt to avert trade war

Trump’s Tariffs Will Be Bad for US Farmers and Consumers

December 11, 2024 | 4:01 pm

US economy

Analysis

Why Trump tariffs will be ‘very bad for America and for the world’

Steven Greenhouse

If enacted tariffs will increase inflation, slow economic growth, and result in US consumers footing the bill




- US politics - live updates
- Trump to impose tariffs on imports from Canada, Mexico and China

CNN Business Markets Tech Media Calculators Videos

Trump’s new trade war would cost middle-class families at least \$1,700 a year, report warns

By Matt Egan, CNN

6 minute read · Published 6:00 AM EDT, Tue May 21, 2024

abc NEWS

These prices could climb within days if Trump slaps tariffs on Canada and Mexico

The Trump administrations says the tariffs will take effect on Feb. 1.

By Max Zahn

January 31, 2025, 2:20 PM

The New York Times

Here’s How Trump Could Lose the Coming Trade War

Nov. 14, 2024

POLITICS

Trump’s threat to impose tariffs could raise prices for consumers, colliding with promise for relief

Shutterstock

## TRUMP’S TARIFFS VS. CHINA’S LONG GAME

China is shrugging off Trump’s tariffs and economic threats.  
By Imran Khalid | January 27, 2025





# Breaking Trade is a Bad Thing

## Canada moved quickly to respond

- Initial tariffs on \$30B of imports
  - Live poultry, some meat products, dairy, tomatoes, citrus, coffee, wheat, barley, oils, margarine, sugar, chocolate, beer, wine and more
- A second phase of on an additional \$125B of imports
  - Following 21 day consultation period
- Non tariff responses from governments and consumers
  - Pulling US alcohol off store shelves
  - Limiting US suppliers from Canadian procurement
  - Buy Canadian campaigns



# Not letting a crisis go to waste

## Adjusting to the new reality

### Short Term (immediately)

- Prioritize political and technical resources to resolving market access barriers
- Increase funding targeted at diversification, new strategies and more proactive export promotion.
- Support the competitiveness of the sector by eliminating the carbon tax on food producers.

### Medium Term (within 6 to 12 months)

- Develop a strategic trade agenda focused on concluding and reinvigorating trade negotiations and the WTO.
- The three Ag Ministers should work to fix the North American relationship through a focus on regulatory cooperation.
- Convene international partners, possibly alongside the G7, to improve collaboration in the face of US threats.

- Expedite trade infrastructure funding, act on the Canada Trade Infrastructure Plan and legislate to mitigate labour disruptions.
- Develop a critical farm input strategy to reduce the reliance on US inputs.

### Long Term (beyond 12 months)

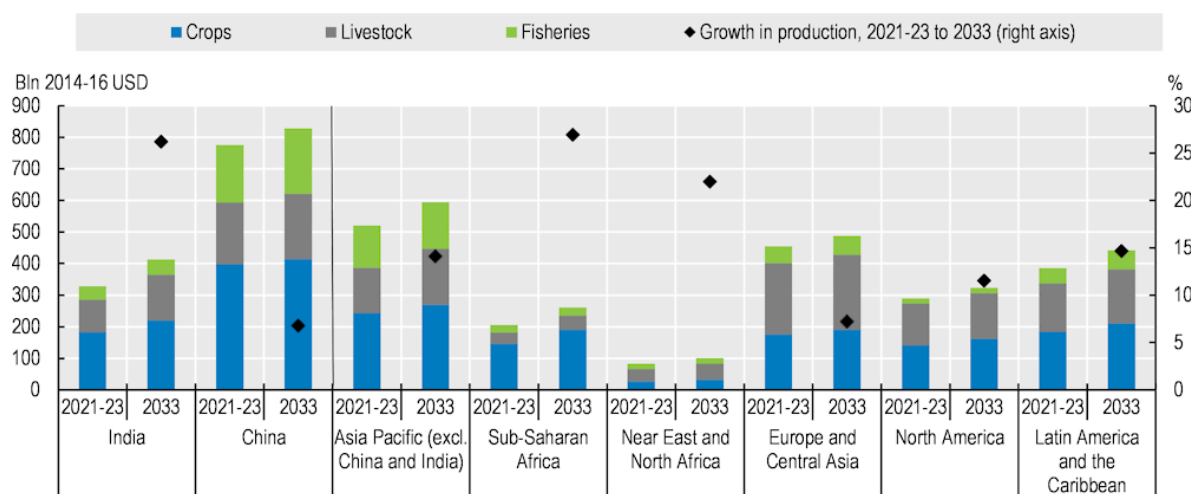
- The Federal Provincial Agreement should be reinvigorated, focusing on stability and then growth through productivity growth and market development.
- Governments should work with value-chains to pursue strategies focusing on adding value in Canada, through more processing, specialization, etc.
- Canada should explore new ways of leveraging food security to deepen relationships with major importers.
- Prioritize funding and regulatory reform to attract investment and facilitate innovations that improve the competitiveness



# On the broader ag trade agenda

## Fundamentals aren't changing

Major producers are facing production pressure



Fewer net exporters but they are exporting more

Figure 1.22. Net agricultural trade of main agricultural commodities by region, in constant value  
Billions USD

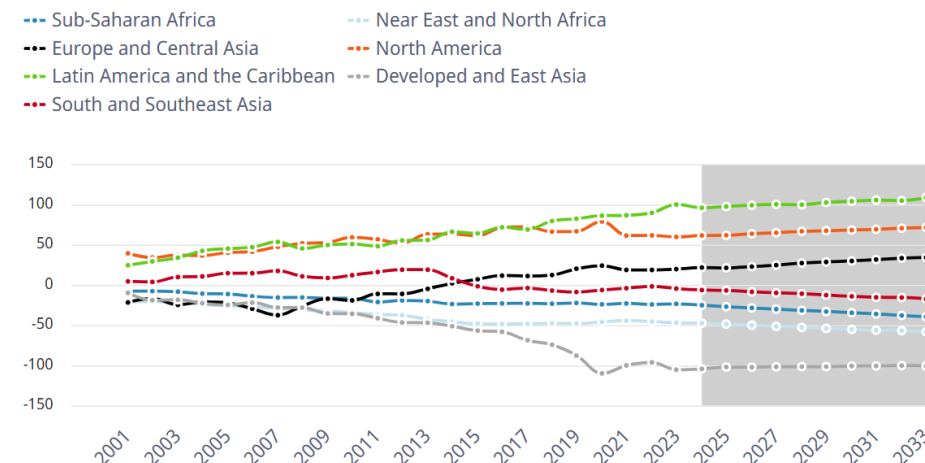
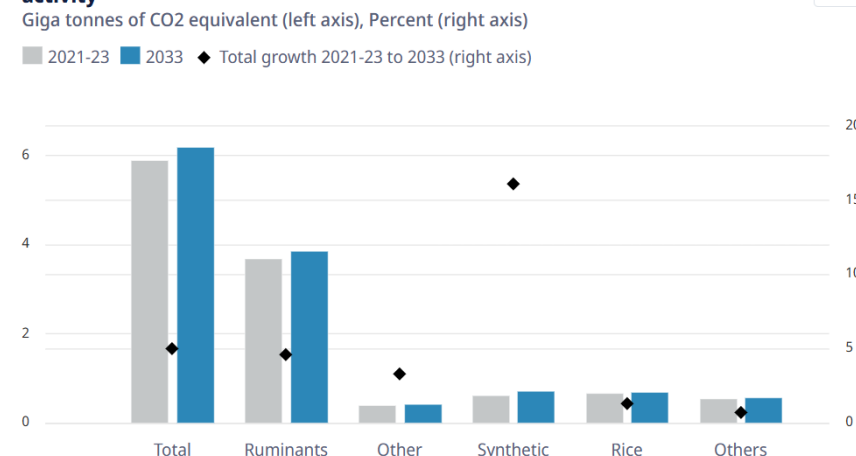


Figure 1.17. Direct GHG emissions from crop and livestock production by activity  
Giga tonnes of CO2 equivalent (left axis), Percent (right axis)



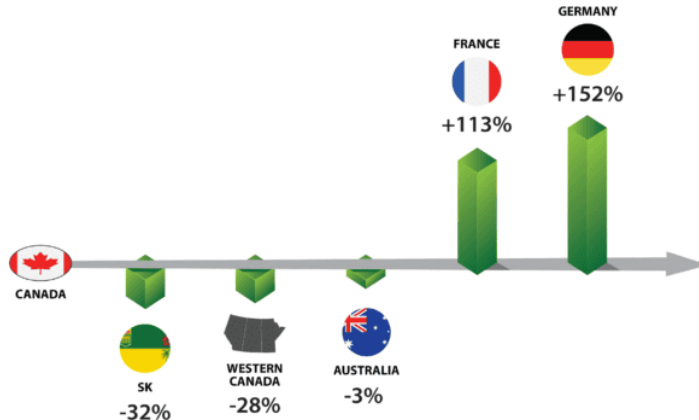
Environmental performance is improving, but the trade can improve it further



# Sustainable producers need sustainable trade

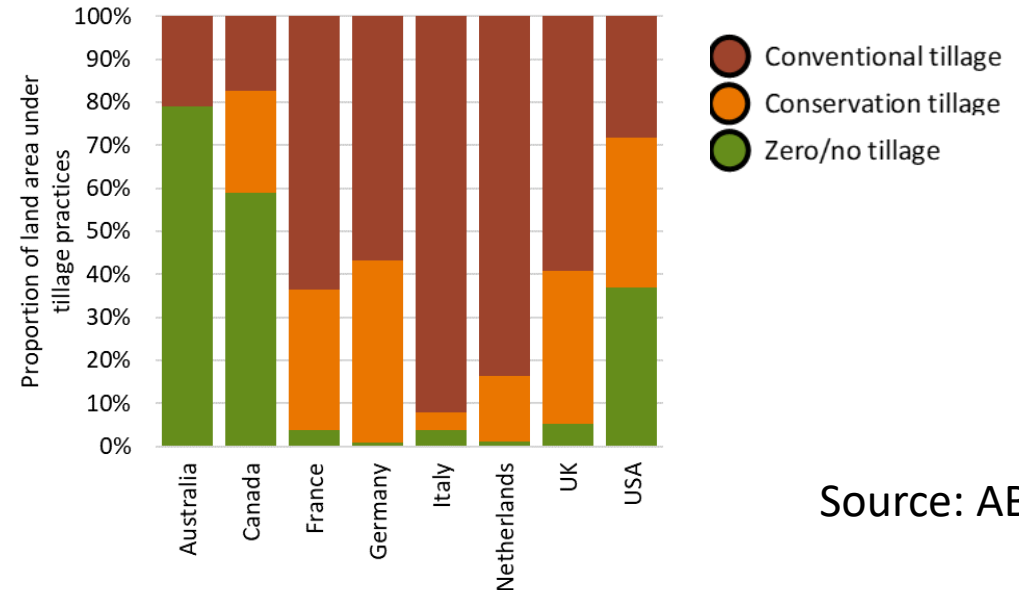
## CANOLA

Regional Comparison: Canola kg CO<sub>2</sub>e/kg including soil carbon per tonne relative to Canada



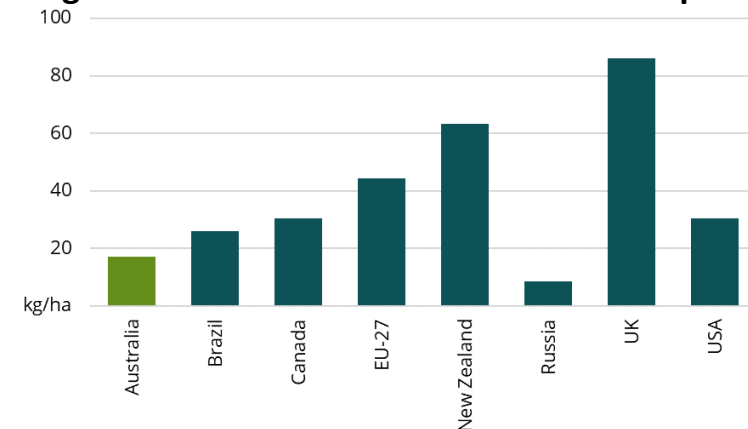
Source: Global Institute for Food Security

GIFS | GLOBAL INSTITUTE FOR FOOD SECURITY



Source: ABARES

## Nitrogen nutrient balances closer to zero are preferable



# Progress is being made, but more work is needed

## THE PATH FORWARD



### Develop Framework

Include science-based principles and outcomes for trade policies.

### Improve Data & Metrics

Invest in global metrics for sustainability and tracking.

### International Cooperation

Foster collaboration to harmonize sustainability in trade.

### Reframe Sustainability

View sustainability as market access, not trade barriers.

### Prioritize Innovation

Support agricultural tech for sustainable, resilient growth.

### Engage Farmers

Consult with farmers in policymaking and support sustainable transitions.





**CAPI**

**THE CANADIAN AGRI-FOOD  
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# KATIE MCROBERT

Executive Director  
Australian Farm Institute

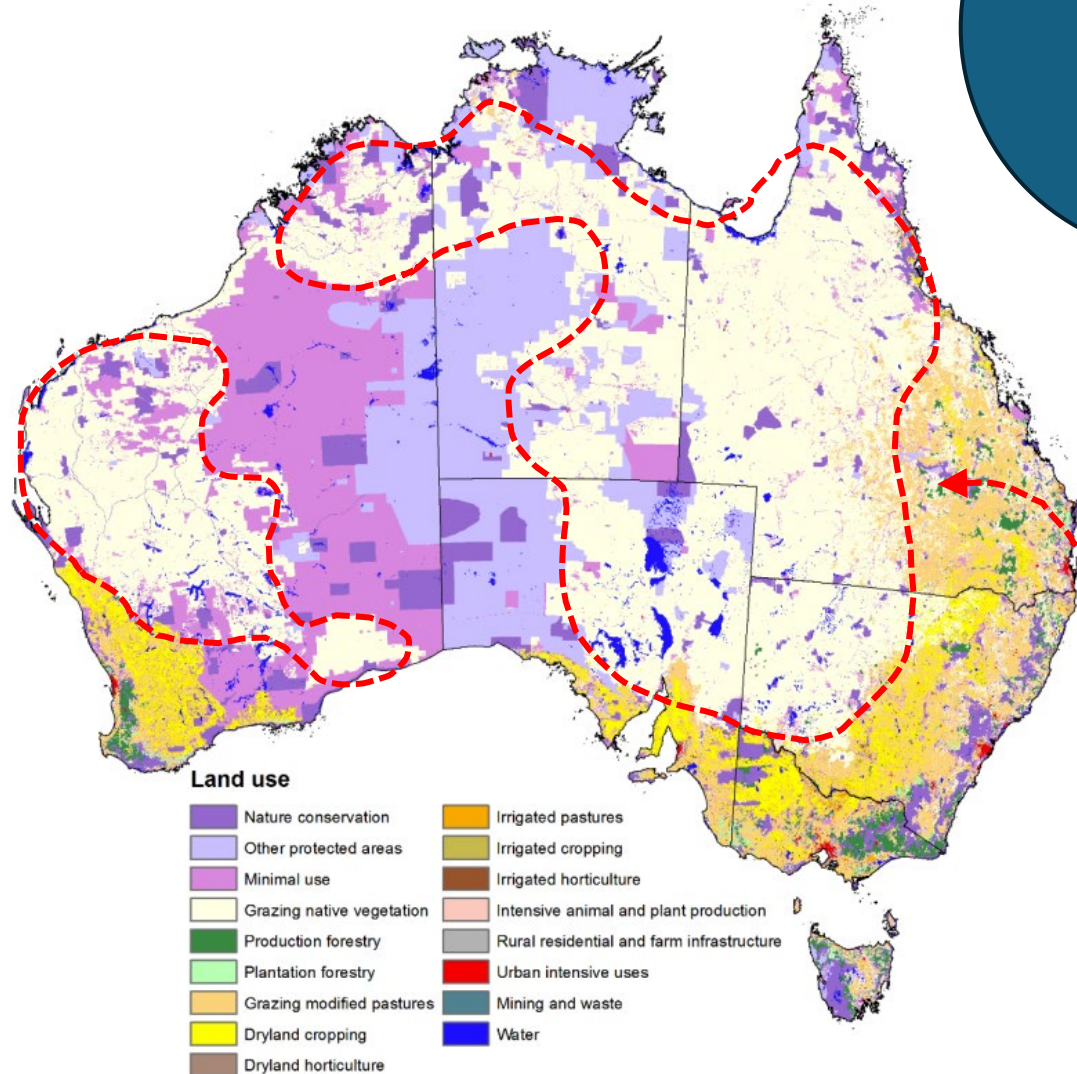
# Building a Sustainable International Agriculture Trade Framework

Katie McRobert – Executive Director  
Australian Farm Institute





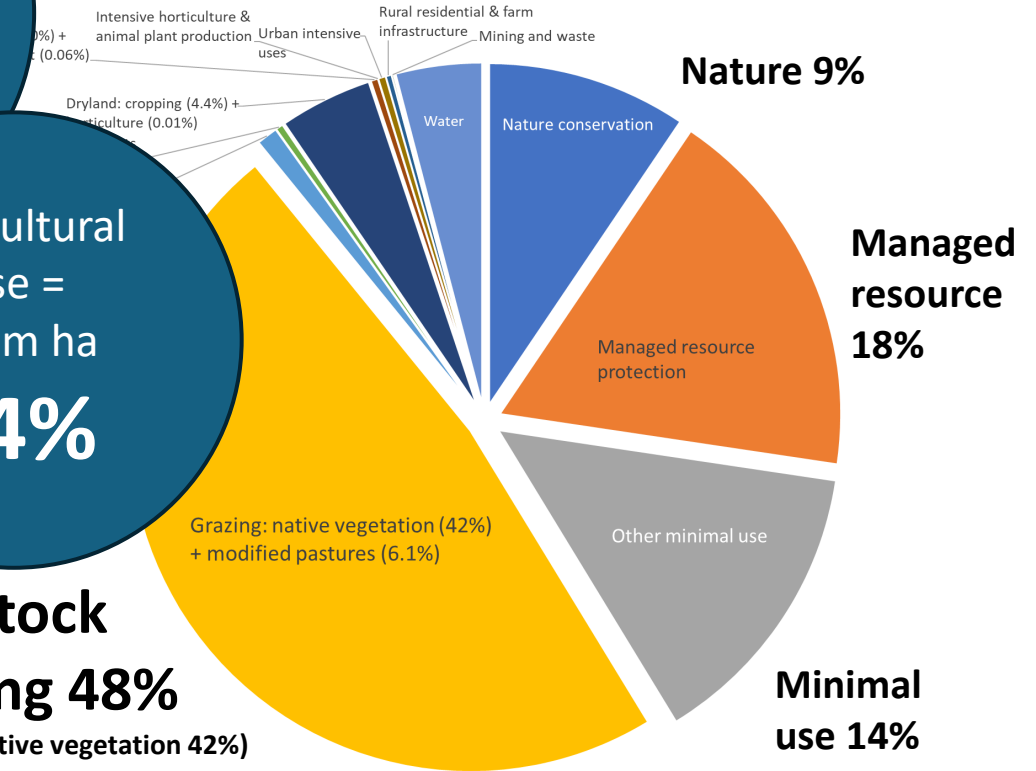
# How we use land:



Indigenous estate = 438m ha  
**57%**

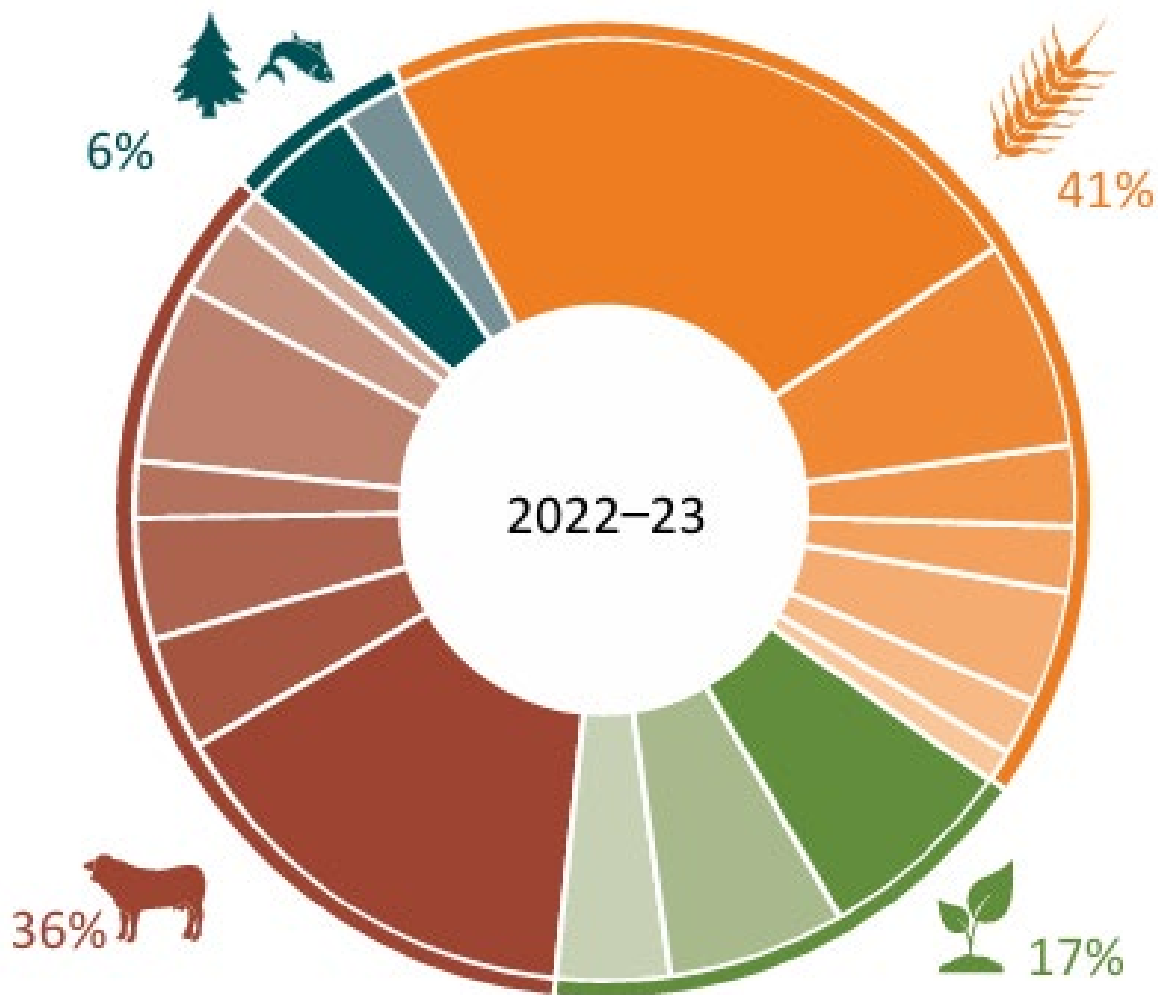
Agricultural use = 421m ha  
**54%**

**Livestock grazing 48%**  
(grazing native vegetation 42%)



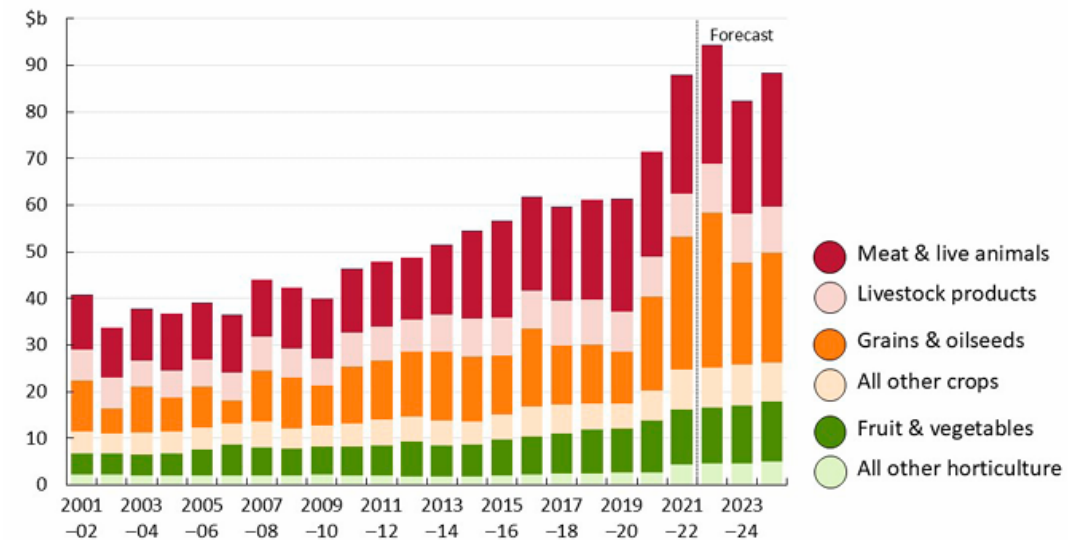
Land uses have a major effect on Australia's natural resources through their impacts on water, soil, nutrients, plants and animals. There is also a **strong link between changing patterns of land use and economic and social conditions**, particularly in regional Australia. - ABARES





## Commodity mix by value of production

Cereal grains	23%	Cattle & calves	15%
Oilseeds	7%	Sheep & lambs	4%
Pulses	3%	Poultry	4%
Hay and pasture crops	2%	Pigs	2%
Cotton	4%	Other livestock	0%
Sugar cane	2%	Milk	6%
Wine grapes	1%	Wool	3%
Fruit and nuts	7%	Other livestock products	1%
Vegetables	6%	Fisheries	4%
Other horticulture	4%	Forestry	2%

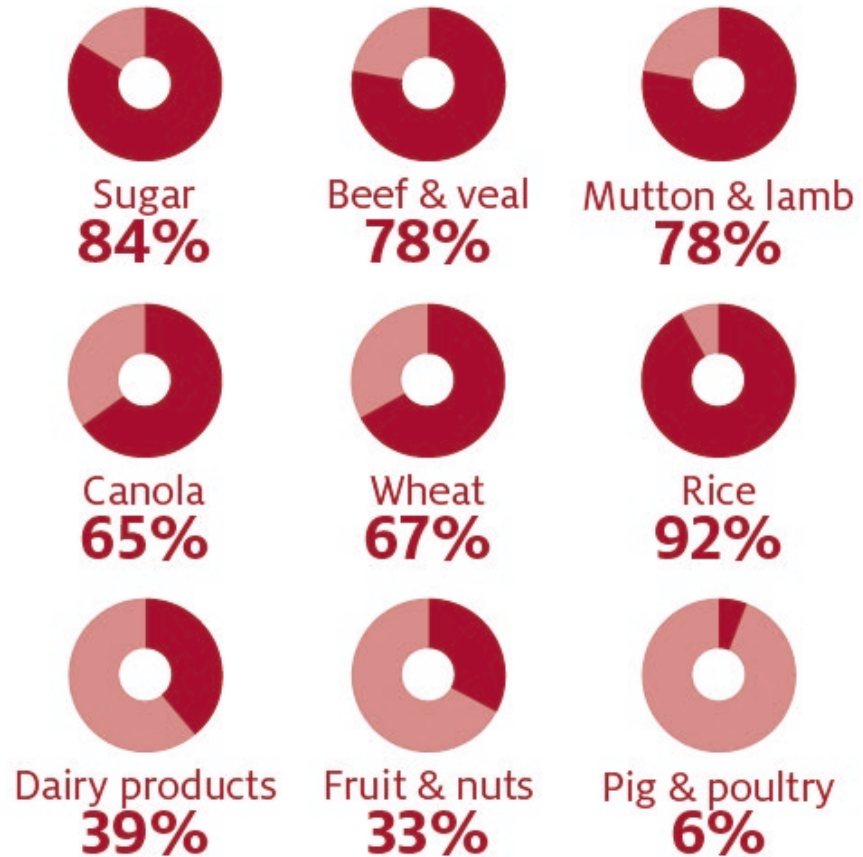
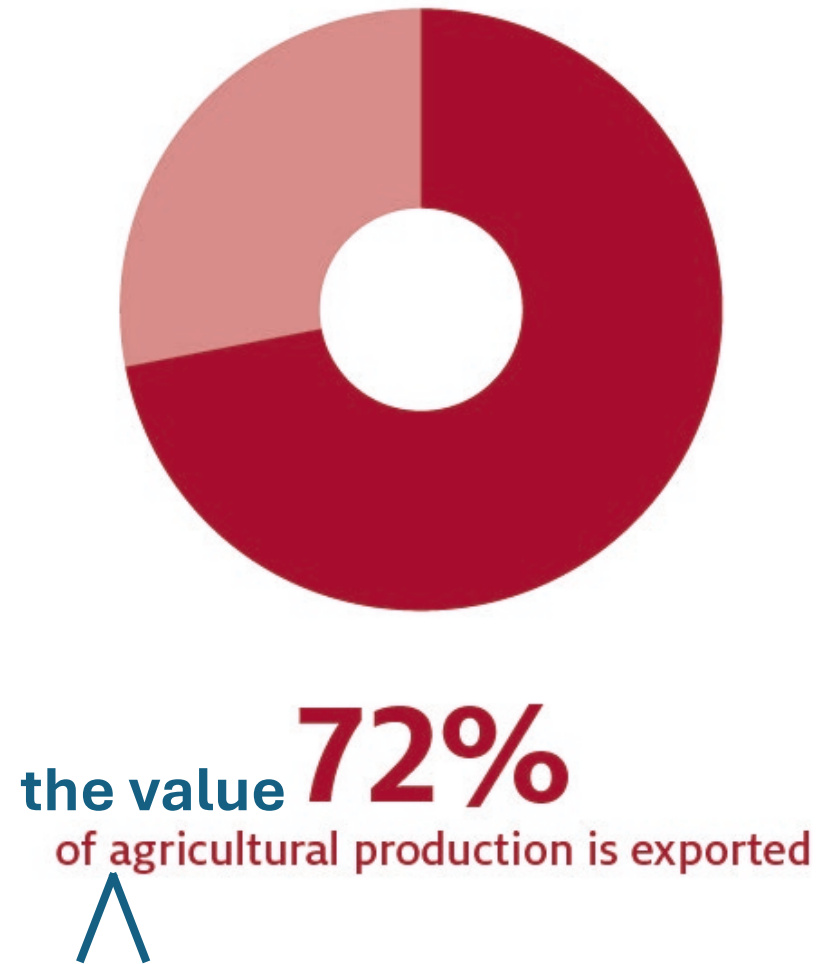


**Figure 1:** Nominal gross value of Australian agricultural production.

Source: ABARES (2024a).

Source: [ABARES Snapshot 2024](#)

# We are a trading nation



Source: ABARES 2023



# How can Aus ag be competitively sustainable?

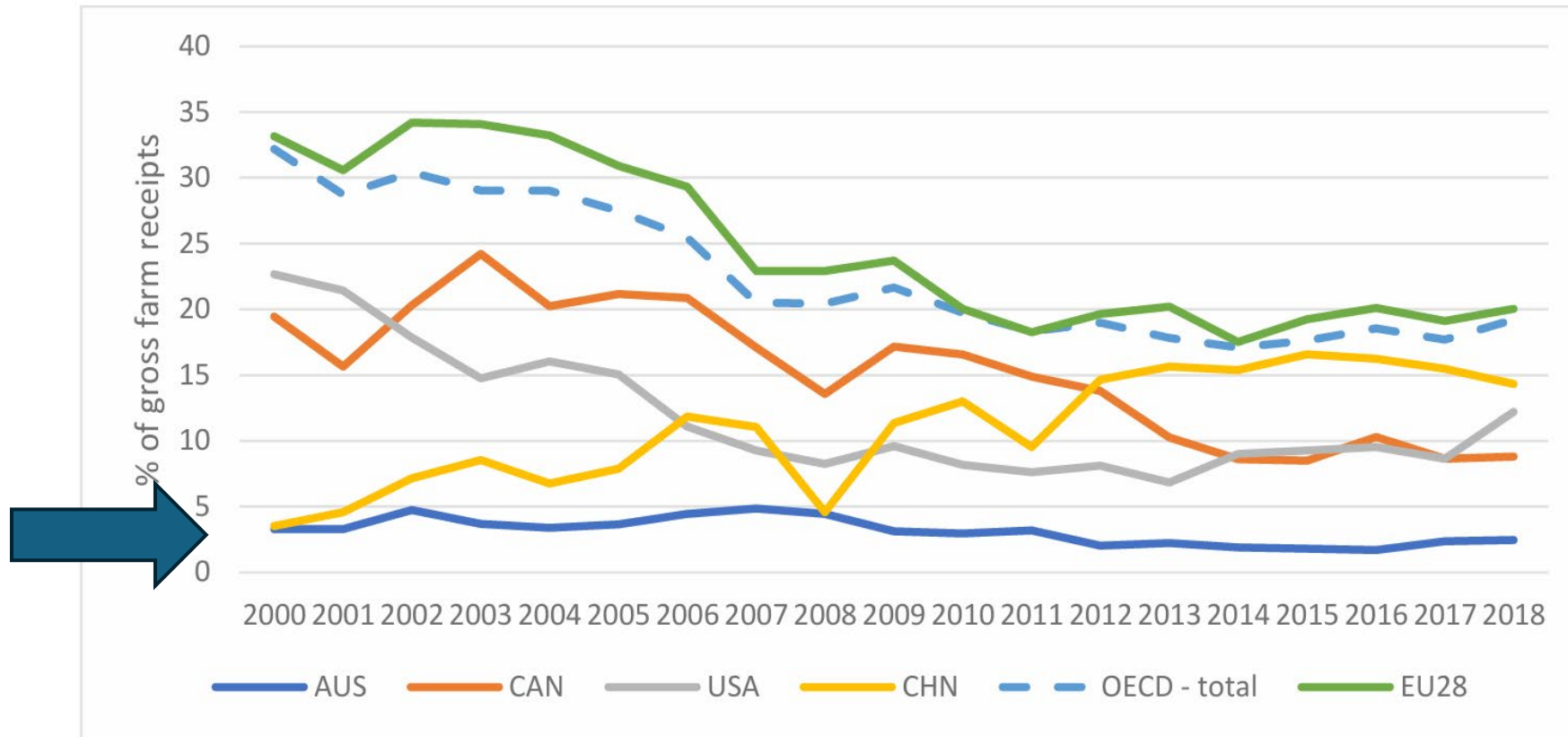
AUTHOR: Jared Greenville, ABARES – [AFI Farm Policy Journal](#)

- Despite obstacles, Aus ag continues to grow
- Ability to respond to consumer / market conditions enabled by domestic and **trade policy**
- Sustainability concerns heighten the rules governing trade = increasing use of non-tariff measures (NTMs)
- NTMs can:
  - promote trade by building trust or
  - create barriers (excessive compliance)
- NTMs = multi-\$B burden on Aus ag exports over time





# Subsidies



## PSE levels

**1986:**

Aus ag = 13%

**2023:**

EU = 17%

China = 13%

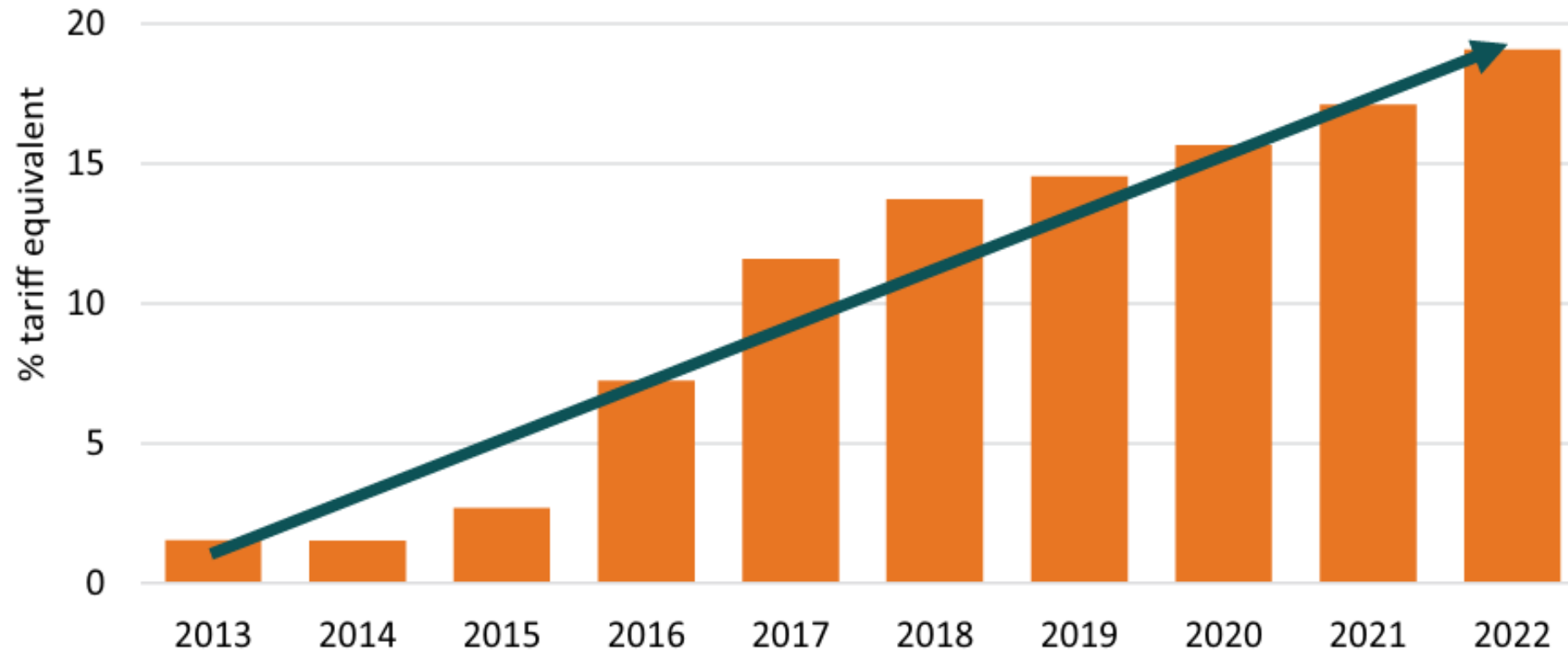
US = 7%

Aus = 3%\*

\*no direct production subsidies – mostly FMDs & income tax smoothing

Figure 1: Producer support estimate (PSE) by Country, 2000-18 Source: (based on OECD, 2020)

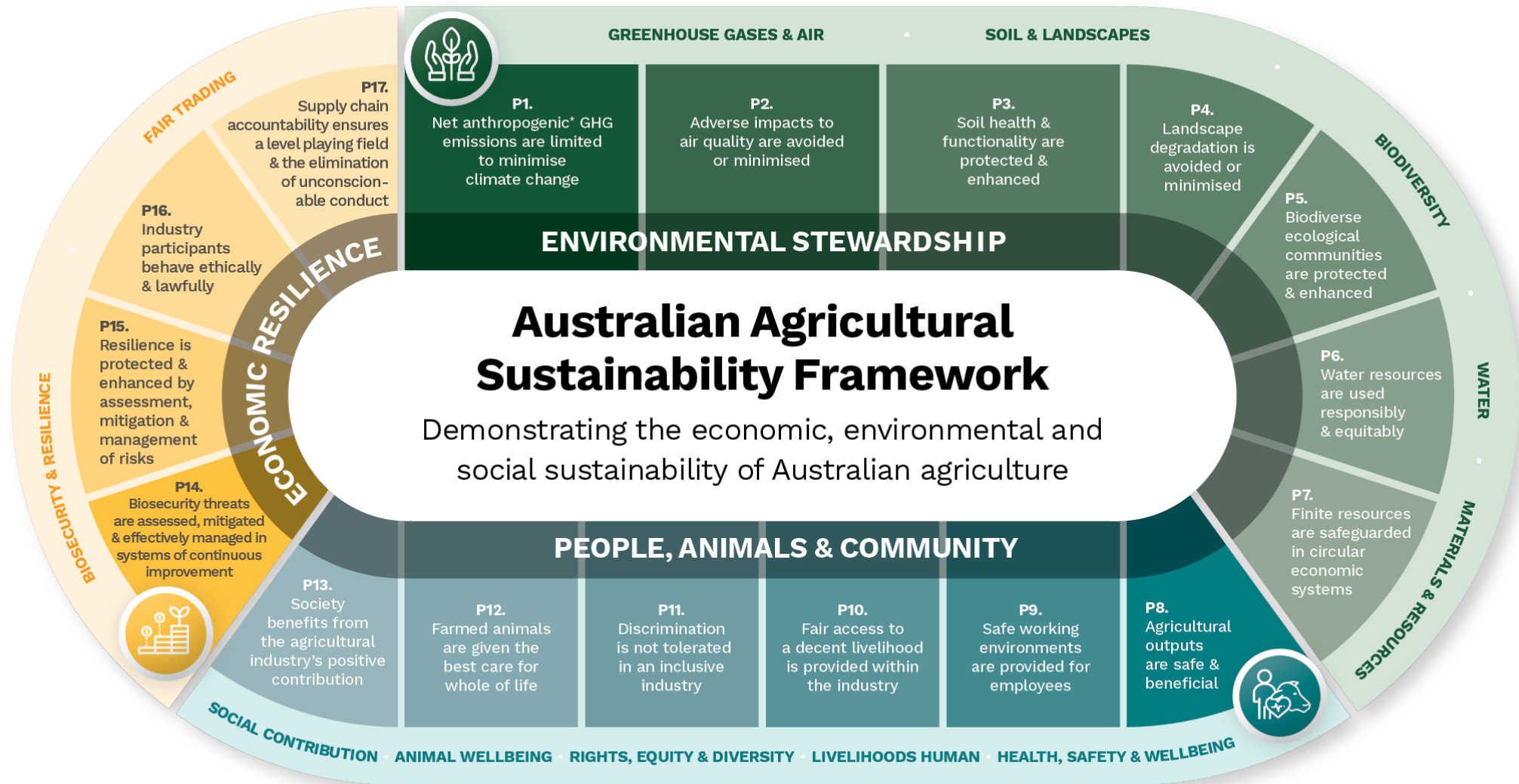
# NTMs



The average tariff-equivalent of NTMs faced by Australian agricultural exporters has been increasing.

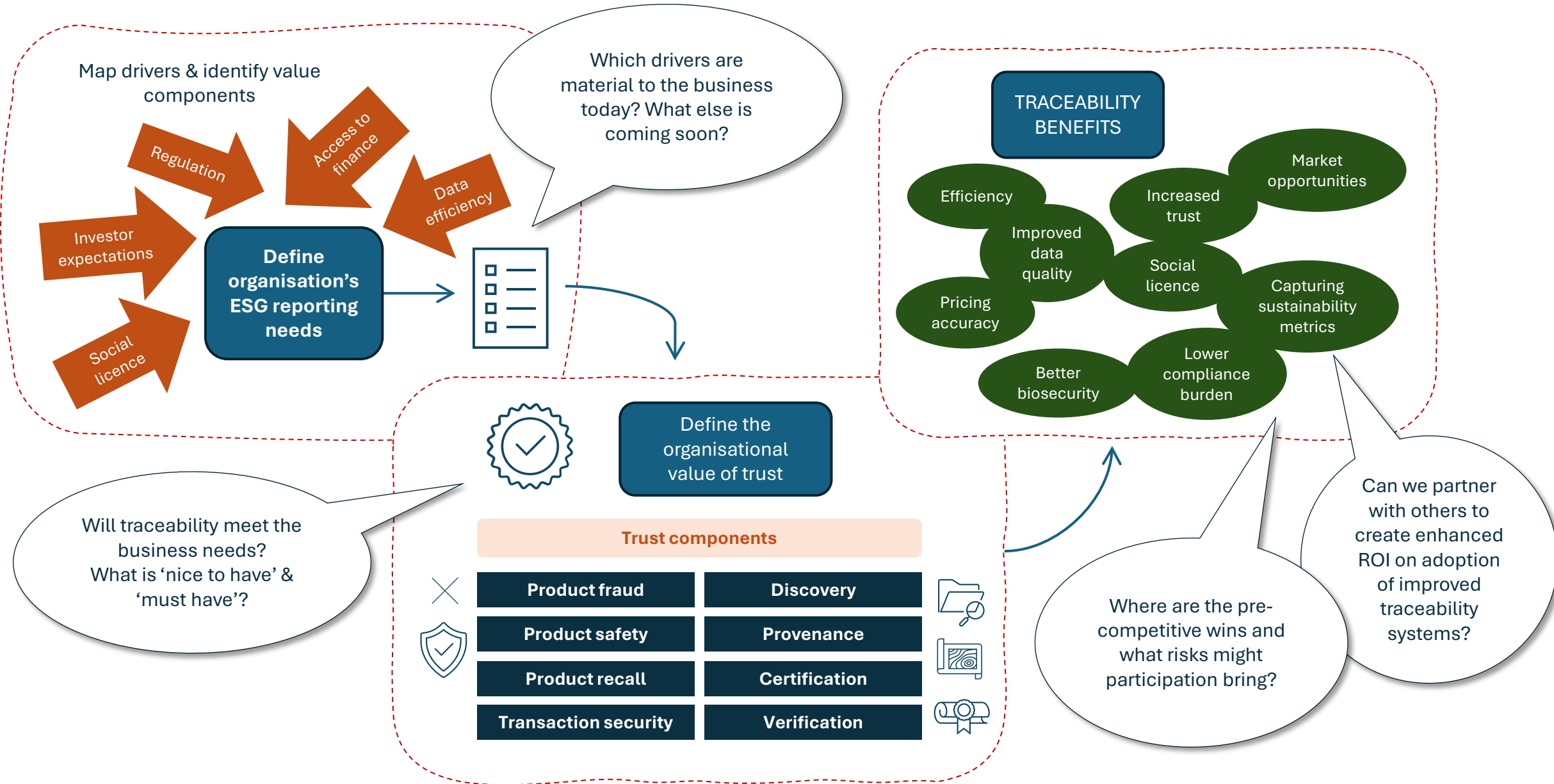
**Note:** Average across grains, red meat, fruit and vegetables, with constant weightings applied (one-third for grains, one-third for red meat, one-sixth for fruit, one-sixth for vegetables) to provide a crude approximation of the share of Australian farm-gate production value across these commodities. Chart includes all commodities and bilateral routes regardless of whether NTMs exist for those combinations.

**Source:** Fell & Creed (2024).





# Not yet ready to meet market ESG expectations



# AgTrace Australia

Supports smarter traceability solutions and data standards that allow systems to integrate with one another

**AATP =**  
**“tell us once”**

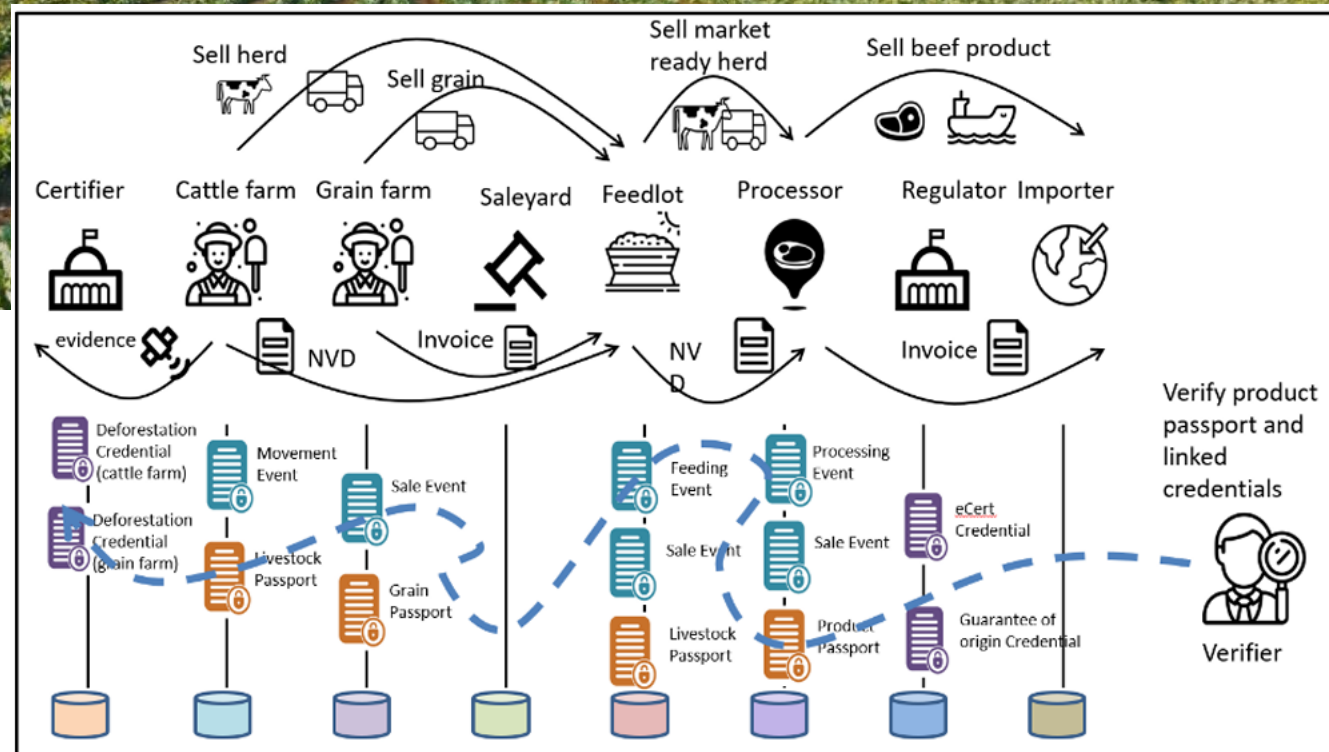
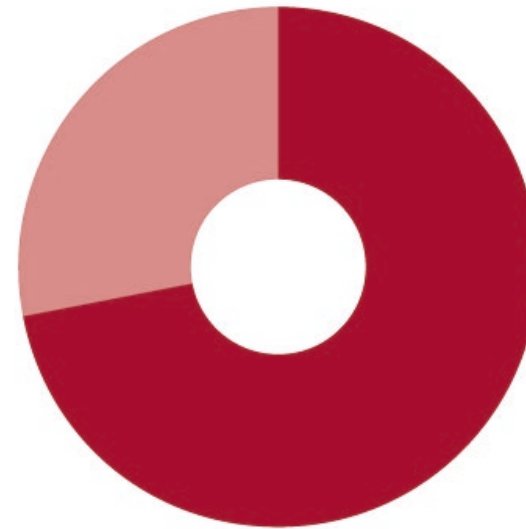
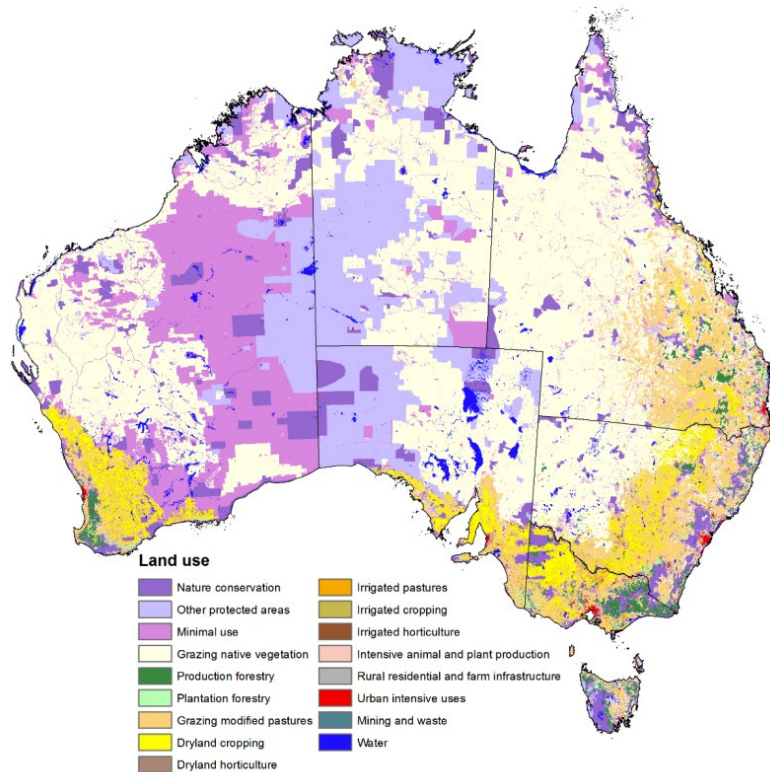


Figure 2: Traceability throughout the supply chain using the AATP



# Decarbonised economies > structural change



**72%**  
of agricultural production is exported



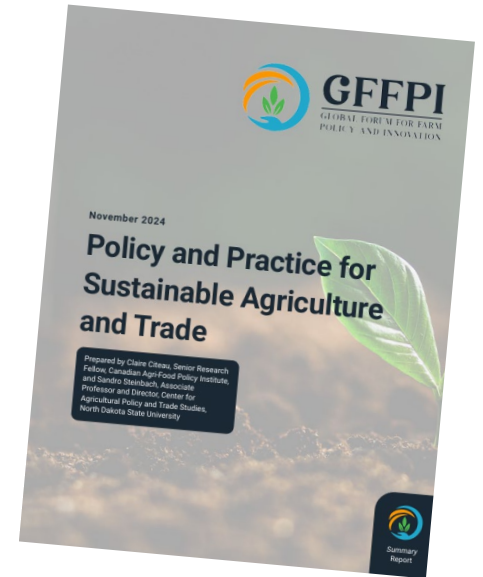
# Policy for sustainable ag & trade

- Free trade
- Shared principles
- Avoid perverse outcomes
- Many paths, one goal

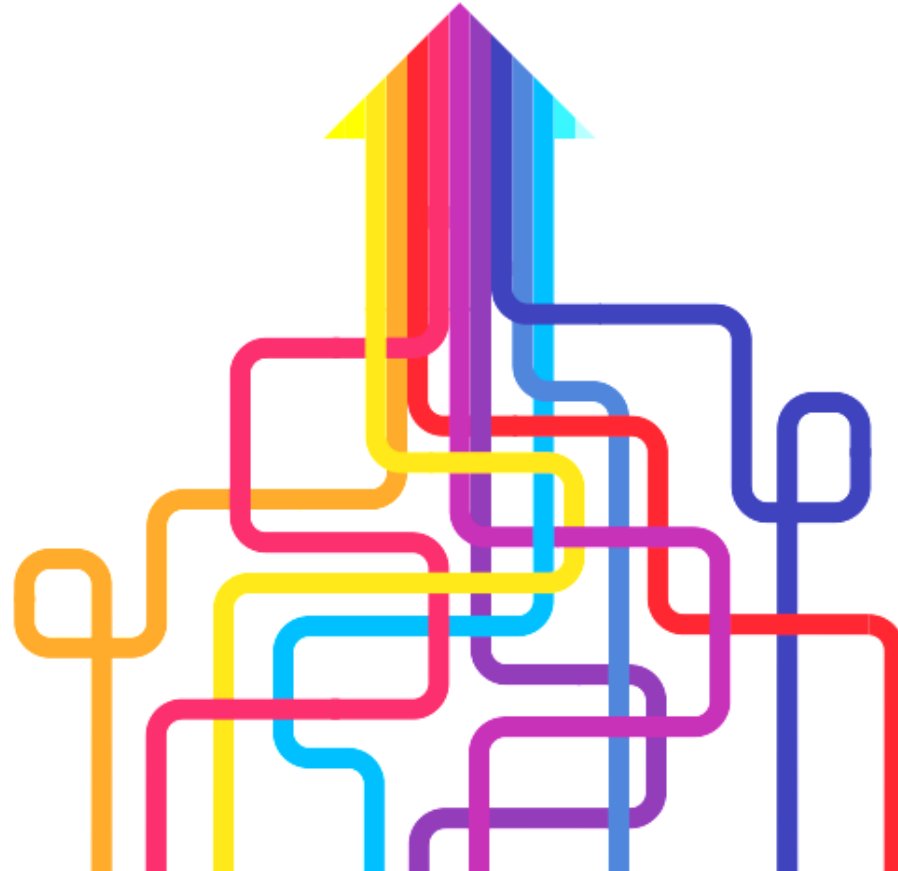
*"We need agricultural policies that keep markets open for trade and encourage technology and innovation, which is essential for sustainable growth. So together, we can come behind a common set of principles and take action to build these more sustainable, equitable, and resilient food systems."*

*"The key is to avoid being overly prescriptive. If we implement excessively rigid measures in the name of sustainability, we risk limiting the flexibility farmers need in each country, region, and individual farm to address their specific economic and environmental challenges."*

*"When environmental measures are poorly designed, they can increase costs, destabilize markets, and affect global food security, potentially undermining efforts to mitigate climate change."*



**Sustainable agriculture**  
**Sustainable economies**  
**Sustainable future**





# DEVRY BOUGHNER VORWERK

Founder and CEO  
DevryBV Sustainable Strategies





**DevryBV**  
SUSTAINABLE STRATEGIES

# **Stay Grounded in Sustainable Food & Ag Trade.**

Presented by: Devry Boughner Vorwerk

**Farm Foundation Forum**

**Building a Sustainable International Trade Framework**

February 6, 2025



# Sustainability

## ISSUE REPORT

February 2024

### Limited Understanding and Differing Perceptions of Agricultural Sustainability Point to the Need for More Consumer Education

#### Executive Summary

Policymakers and agri-food businesses around the world are striving to accelerate the transition to more sustainable agricultural systems, including by encouraging consumers to purchase food products that are more sustainably produced. An issue with this strategy could arise if consumers' understanding of agricultural sustainability and the terms used to describe it deviate from producers' understanding. In these cases, market signals from consumers to producers and vice versa would be eroded by divergent lexicons, creating muddled market outcomes. Based on a survey of U.S. households and food systems experts, we find dramatic differences between consumers' and producers' understandings of what is meant by sustainable agriculture, particularly concerning the importance of economic sustainability. Overall, this report advocates for a shared understanding of sustainability goals facilitated through better communication and education around sustainable agriculture. A core takeaway for policymakers and agri-food businesses is the need for more consumer education about sustainable agriculture to make market approaches work.

#### By Trey Malone and Elise H. Golan

*Dr. Malone is an agri-food economist on faculty at the University of Arkansas. In 2023, he served as Farm Foundation's Agricultural Economics Fellow for Sustainable Food Systems.*

*Dr. Golan is the director for sustainable development at the U.S. Department of Agriculture. In this role, she provides leadership in planning, coordinating, and analyzing the Department's policies and programs related to sustainable agriculture and sustainable food systems.*

#### About this Issue Report

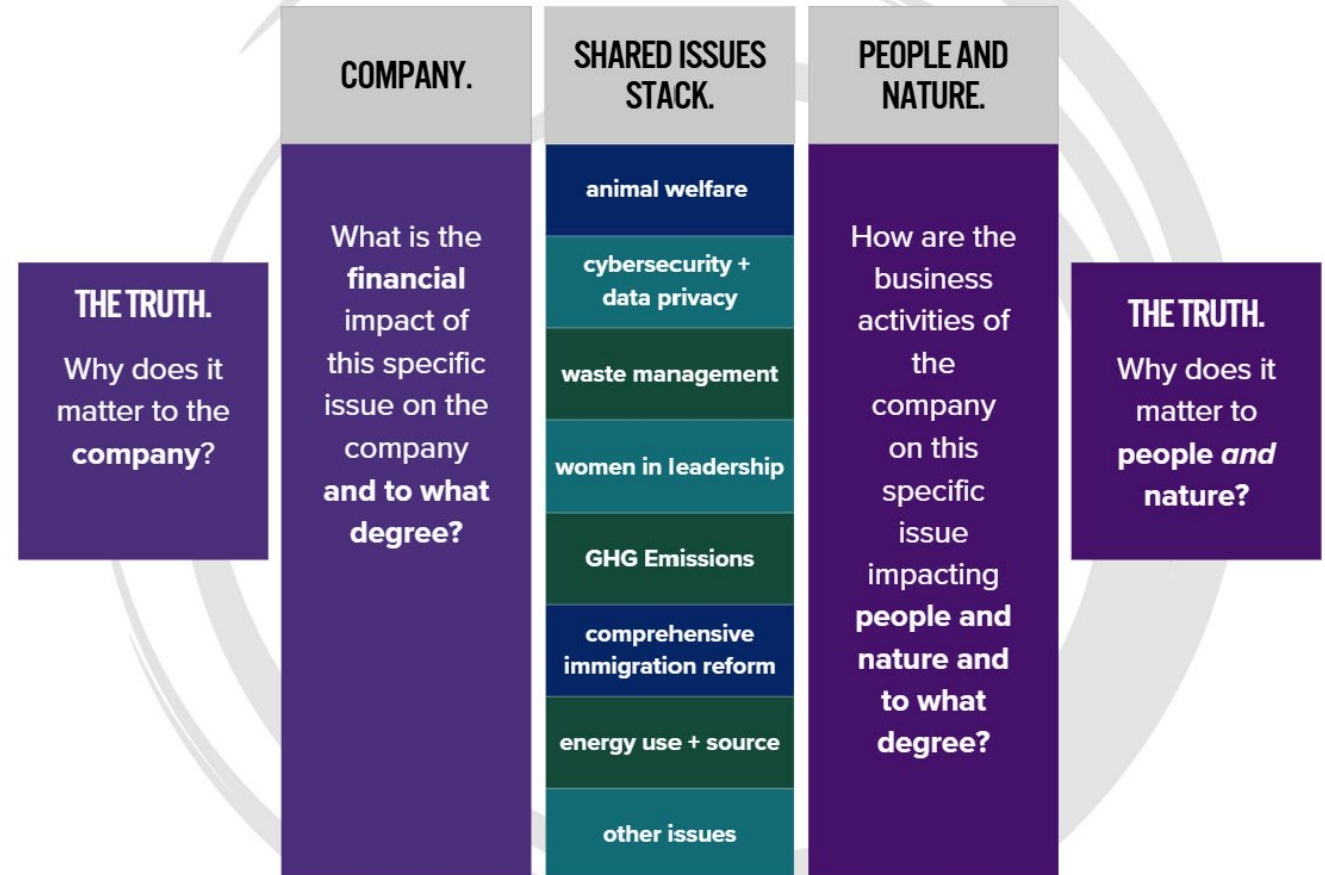
*This Farm Foundation Issue Report provides an overview of the lexicon of sustainable agriculture. It also summarizes consumer understanding of what is meant by sustainable agriculture.*

ement tool and  
a company's  
ty. ESG is the  
used to  
w, verify, and  
tainability efforts.

# Double Materiality.

## THE STEWARDVERSE™ MATERIALITY APPROACH.

CONTINUOUS CONVERSATION.



SEEK. FACE. FOLLOW. SHARE.

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Change  
model for  
business and  
industry.





An aerial photograph showing a rural landscape. A paved road intersects a dirt road. The fields are divided into sections of different colors: green, yellow, and brown. A small building is visible in the upper right. The text "Ok, Let's Stay Grounded on Sustainable Trade." is overlaid in white.

**Ok, Let's Stay Grounded  
on Sustainable Trade.**





# Overview.

- I. Global Industry's Unified Purpose.**
- II. Brief History.** *(through the lens of a practitioner)*
- III. Traversing the Moment.**
- IV. Re-engaging Global Platforms on Trade (and sustainability).**



# **I. Unified Purpose.**

**“I believe** in the **future of agriculture**, with a **faith** born not of words but of deeds – achievements won by the **present** and **past** generations of agriculturists; in the promise of **better days** through **better ways**, even as the better things we now enjoy have come to us from the **struggles** of former years.”

**~National FFA Creed, par. 1**

# Shared Purpose as a Global Industry.



THE GLOBAL GOALS

## 2 ZERO HUNGER

End hunger, achieve food security and improved nutrition and promote sustainable agriculture.

### TARGET 2.7



#### PREVENT AGRICULTURAL TRADE RESTRICTIONS, MARKET DISTORTIONS AND EXPORT SUBSIDIES

Correct and prevent trade restrictions and distortions in world agricultural markets, including through the parallel elimination of all forms of agricultural export subsidies and all export measures with equivalent effect, in accordance with the mandate of the Doha Development Round.

Find out more

### TARGET 2.4



#### SUSTAINABLE FOOD PRODUCTION AND RESILIENT AGRICULTURAL PRACTICES

By 2030, ensure sustainable food production systems and implement resilient agricultural practices that increase productivity and production, that help maintain ecosystems, that strengthen capacity for adaptation to climate change, extreme weather, drought, flooding and other disasters and that progressively improve land and soil quality.

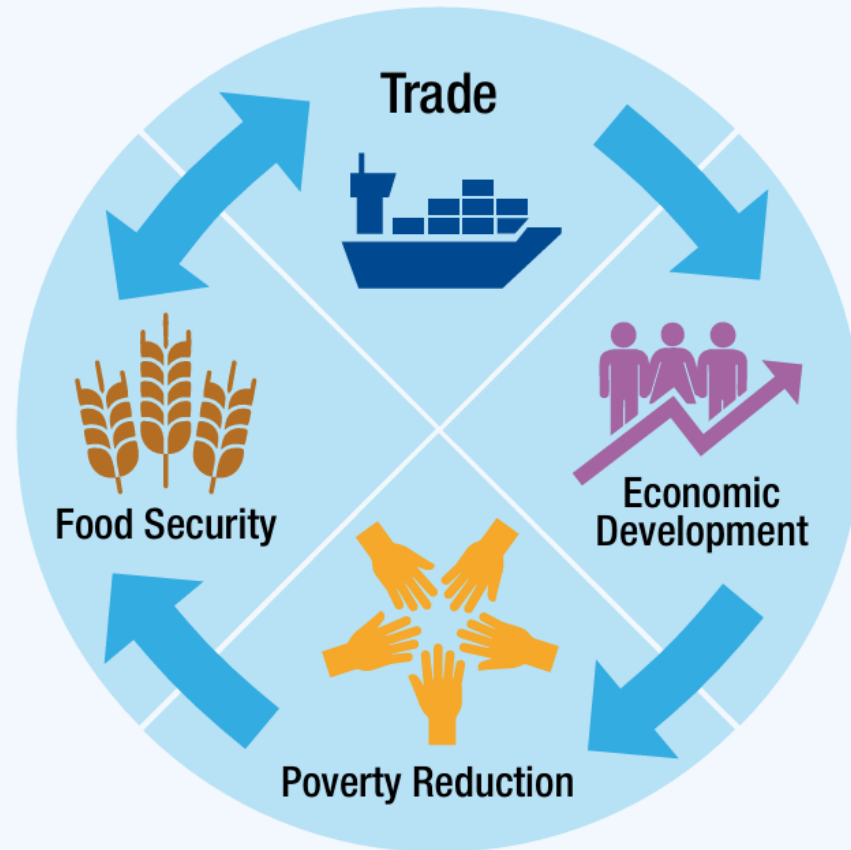


# Trade combats hunger, chronic-hunger, malnutrition, starvation, and death.



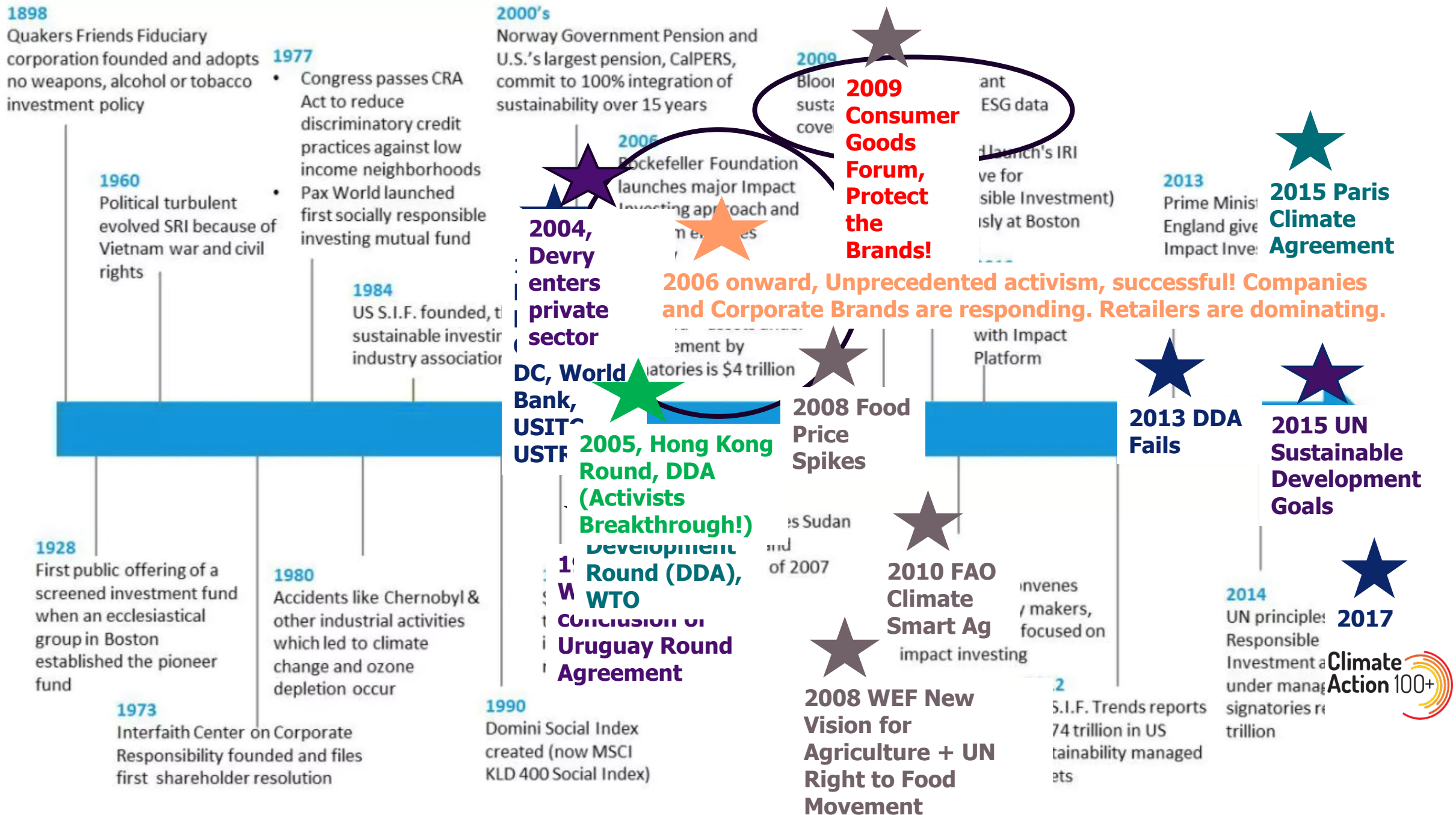
**Figure 1.**

The indirect impact of trade on food security



Source: UNCTAD.

## **II. Brief History Lesson.**







# BRANDSI

Sustainability + Trade + ESG + Climate Agenda  
**“Tornado”** for past 20+ years.



**Business License to Operate.**

# **III. Traversing the Moment.**



# 1. Scrutiny on ESG, climate, trade.

Legislative  
Scrutiny

Shareholder  
Scrutiny

Administrative Scrutiny.



## 2. “Greenhushing”\* and Retrenchment.

\*Greenhushing is a term coined by Thomas Crampton of Crampton Blackie Partners.



Unilever PLC [+ Add to myFT](#)

### Unilever merges sustainability role after revising environmental goals

Consumer goods giant which has scaled back some green targets is to combine position with other areas

CEO Hein Schumacher has said Unilever is shifting its focus away from sustainability advocacy



3. Trade Props Up Sustainability.  
Also, could sustainability lead to a Trade War?

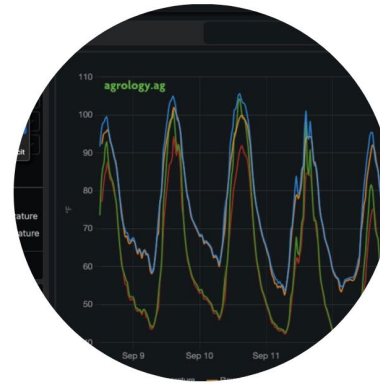




# 4. Standards Convergence.



## 5. “Carbon Vacuum” and measurement.



## 6. “Colander Effect” on ~~Climate~~-smart Innovation.





## **IV. Global Platforms on Trade.**

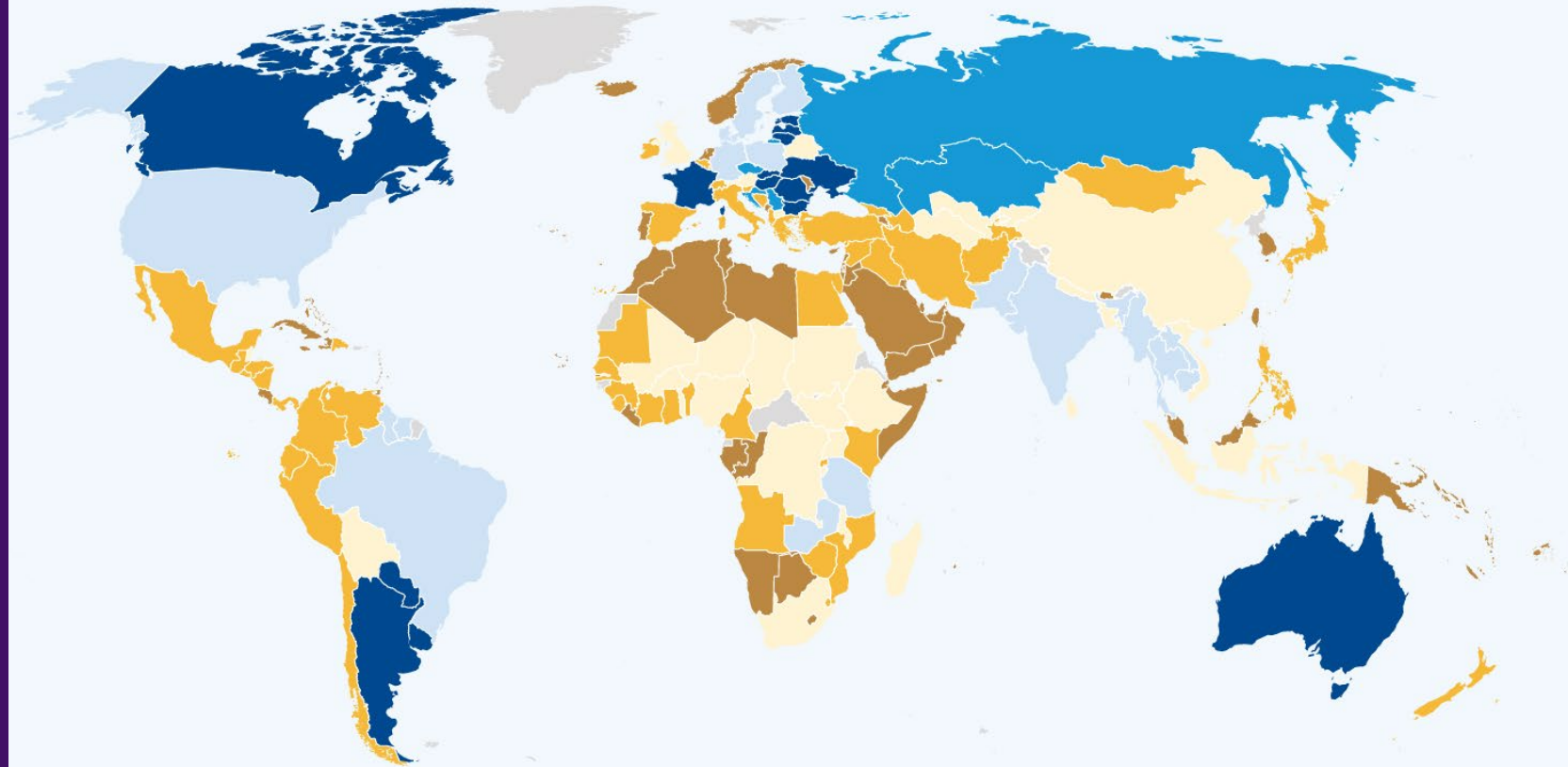
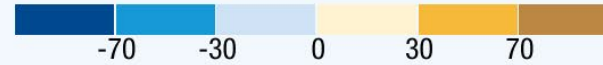
# 0. Customers First: Commercial Diplomacy.



**Figure 3.**  
**Net exporters and importers of cereals**

Cereal import dependency ratio, per cent, 2020-2022

← More exports    More imports →



Source: UNCTAD based on FAOSTAT.

# 1. Farmers First.





## 2. WTO.



WORLD TRADE  
ORGANIZATION

WORLD TRADE  
ORGANIZATION

WORLD TRADE  
ORGANIZATION

### 3. Other key trade forums.





LEE ANN JACKSON

Head of the Agro-food Trade and Markets Division  
OECD



# Emerging issues for sustainable agriculture and trade

Farm Foundation Forum

6 February 2025

Lee Ann Jackson

Head of Agro-food Trade and Markets

OECD Trade and Agriculture Directorate



## Who we are

- International organisation based in Paris
- 38 member states across the world, representing 80% of global trade
- 3000+ employees

## What we work on

- The full range of social, economic and environmental challenges...
- More than 30 committees on topics such as tax evasion, best practices in education, foreign aid... and **food and agriculture**

## How we work

- Inform & advise – unique source of data, analysis and insights
- Engage & influence – bringing policy makers together to exchange ideas
- Set standards & provide policy support



# Roadmap

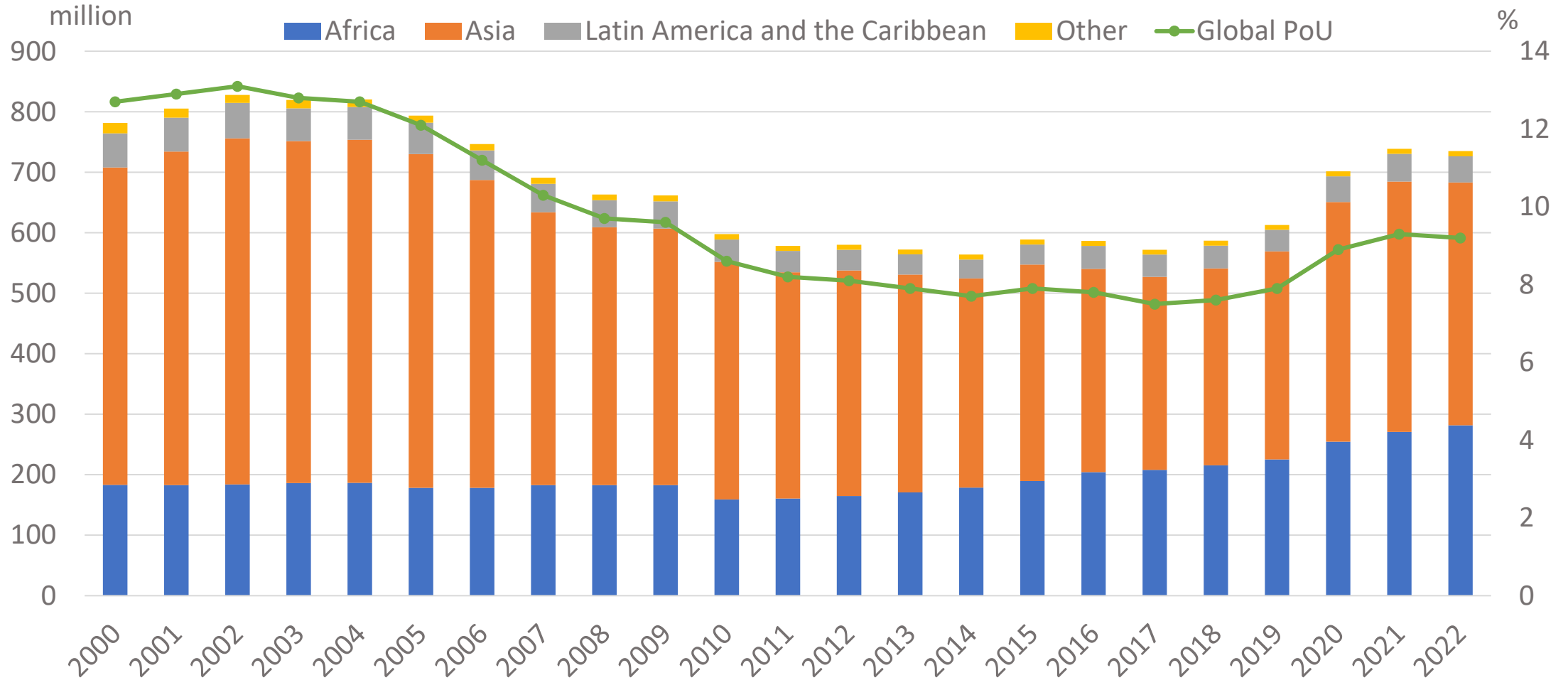
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- Global agri-food market and the food systems triple challenge
- Policy developments
  - Investments in sustainable productivity
  - Tracking environmental outcomes along supply chains
  - Measures targeting sustainability through trade
- Opportunities and challenges





# Number of undernourished people

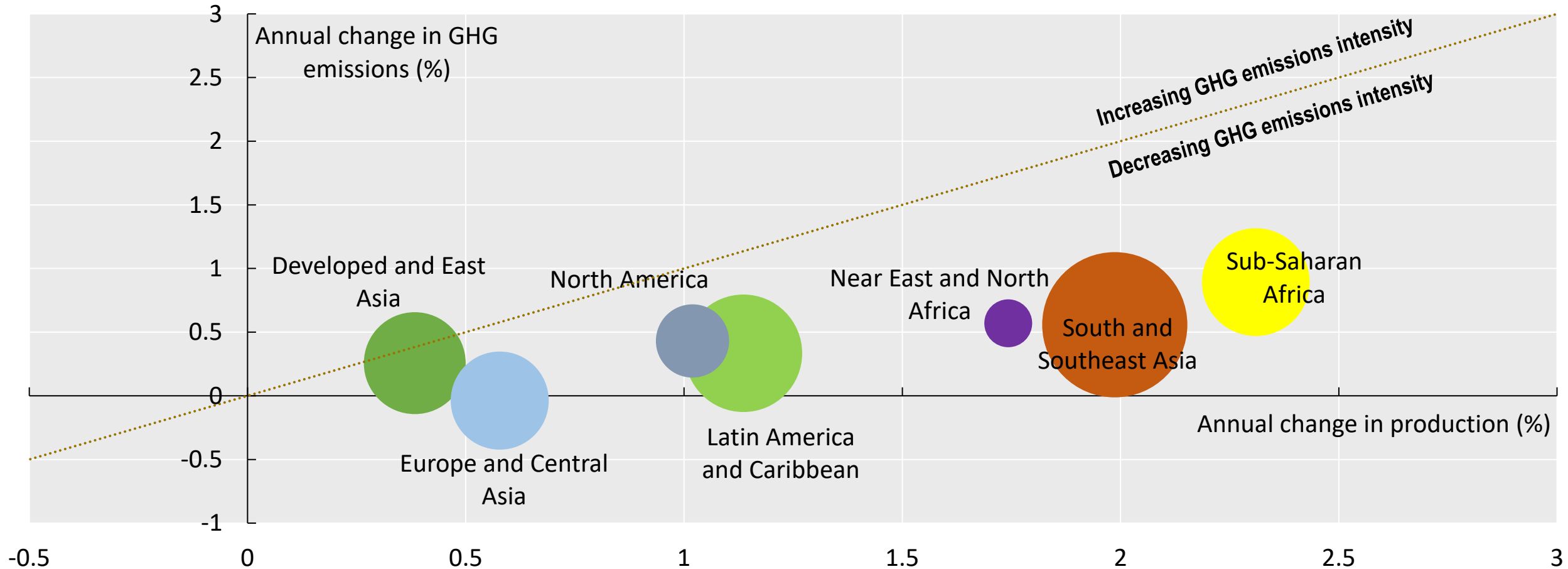


- Source: FAO, IFAD, UNICEF, WFP and WHO. 2023. *The State of Food Security and Nutrition in the World 2023. Urbanization, agrifood systems transformation and healthy diets across the rural-urban continuum*. Rome, FAO.

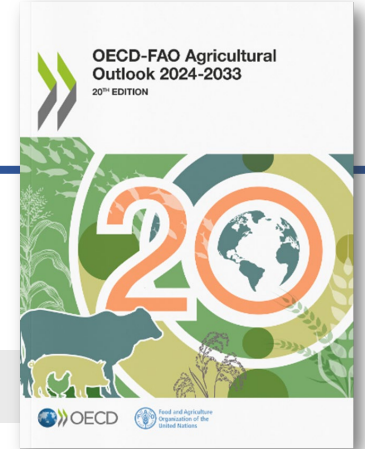


# Agriculture's global GHG emissions intensity will decline

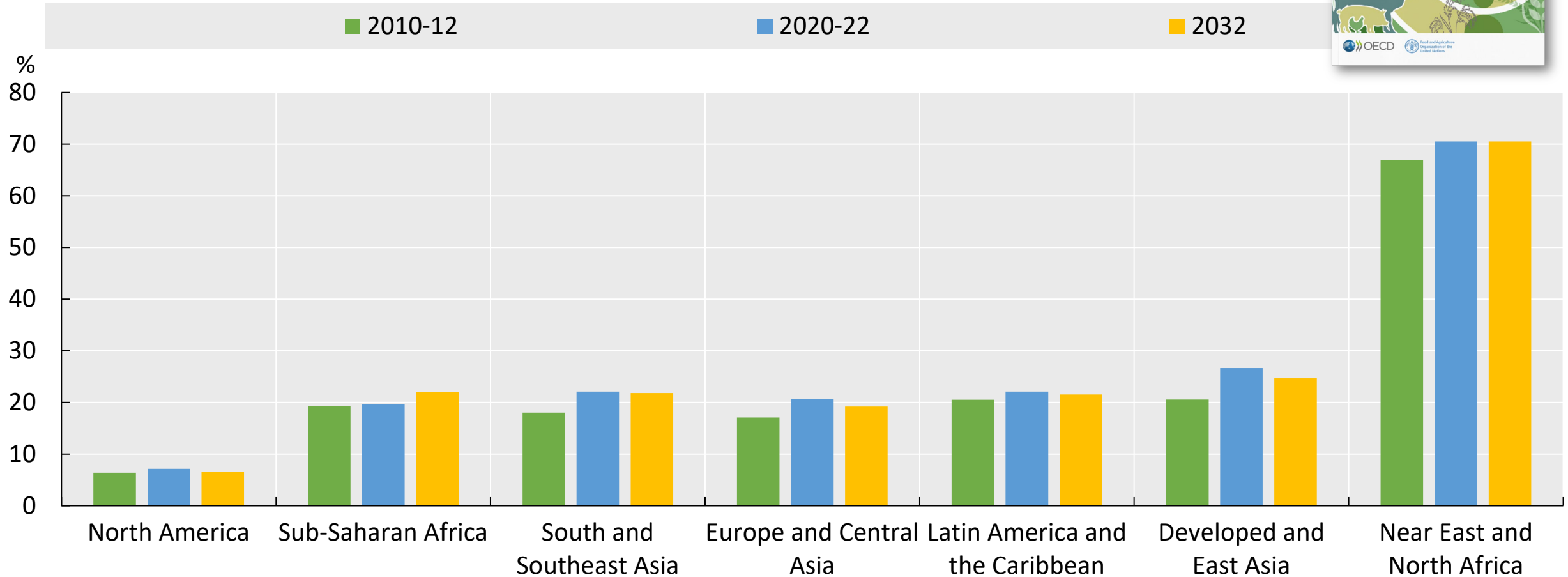
GHG emissions and emissions intensity from agriculture, 2021-23 to 2033



# Trade plays a key role in ensuring food security



Imports as share of total consumption by region, in calorie equivalents







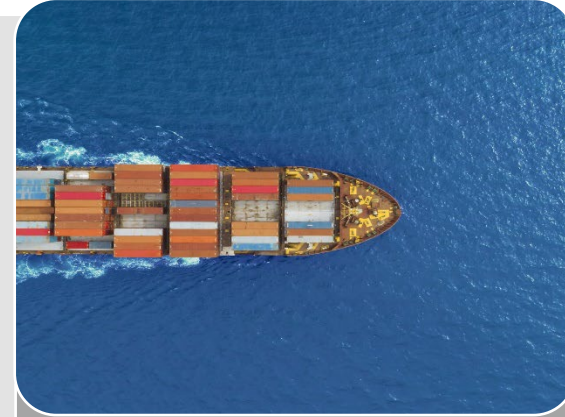
# Policy developments



Domestic policies for sustainable productivity



Food systems and carbon footprint measurement

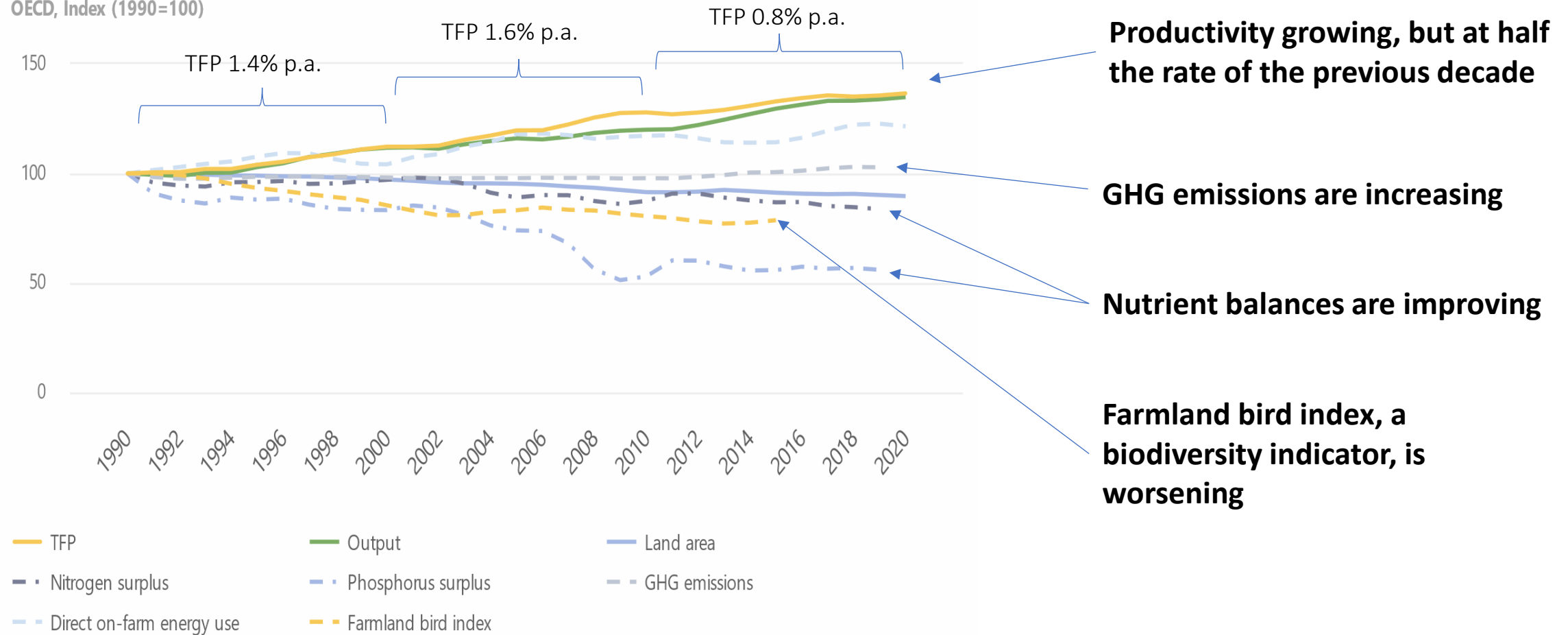


Trade-related measures with environmental objectives for agriculture



# Progress on productivity and sustainability has been mixed

OECD, Index (1990=100)





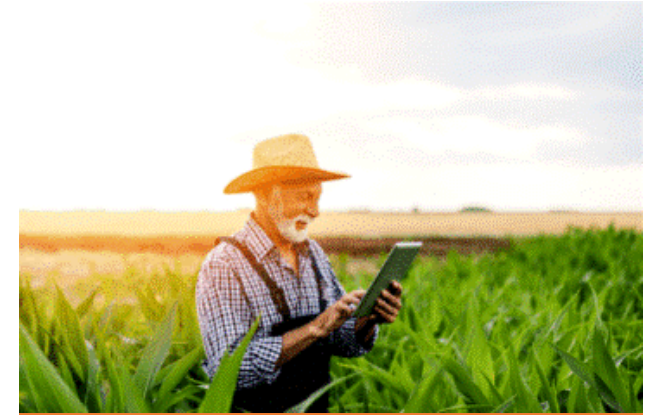
# Three levers to reduce the carbon footprint of food systems



**Shift to lower-emission  
*product categories***



**Shift to lower-emission  
*producers*  
(within each category)**



**Shift to lower-emission  
*techniques*  
(everywhere)**





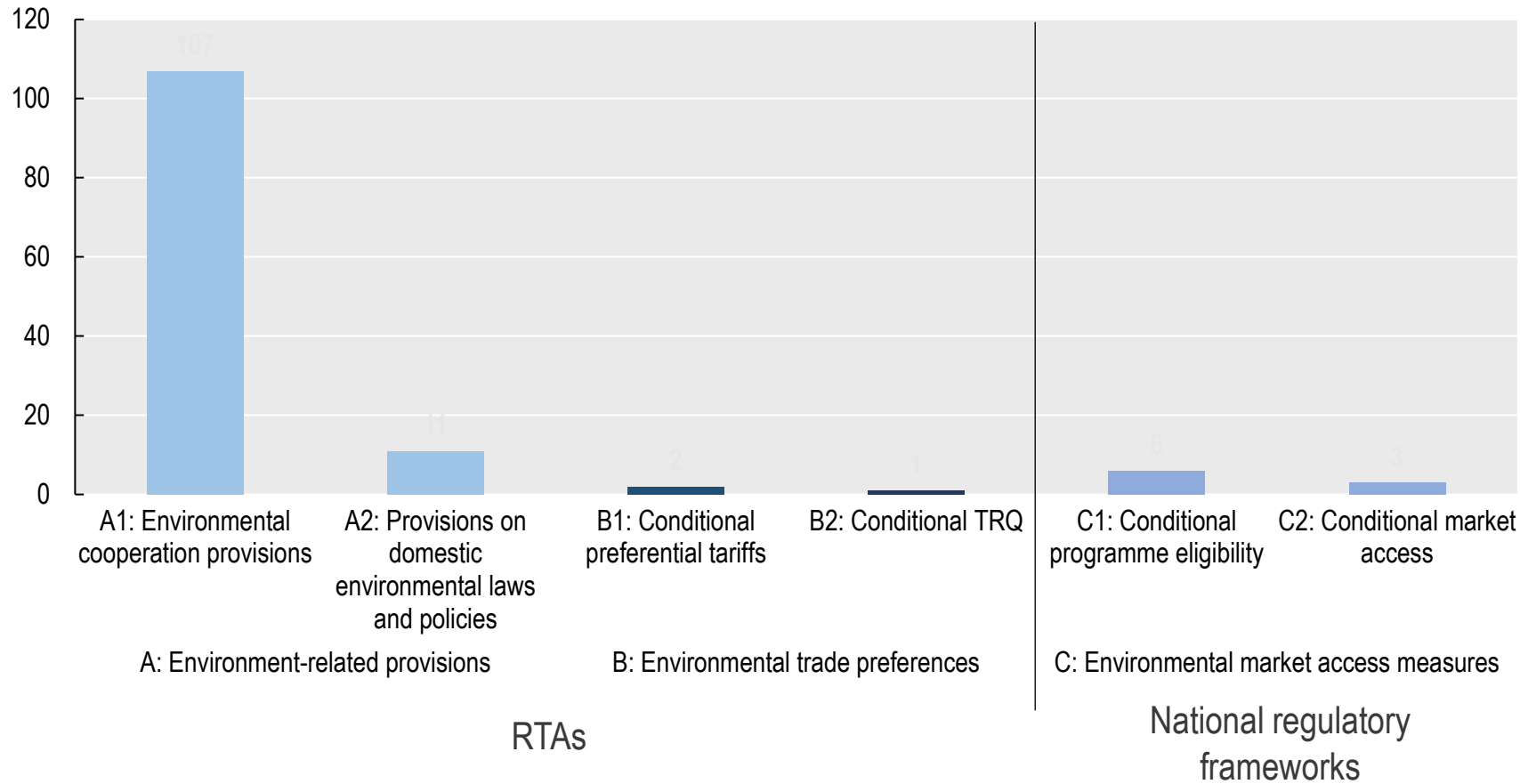
A complex landscape of reporting standards and guidelines has emerged







# Countries are adopting diverse trade measures for sustainable agriculture



- **130** measures
- 55% introduced between 2020-24
- 93% contained in RTAs, the rest in national regulatory frameworks



# Policies can enhance the contribution of trade and markets to food systems, yet the choice of action can be challenging

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- Trade plays an important role for global food security and new measures are expected.
- Agriculture is a policy-heavy sector, with significant market intervention and distortions globally and nationally
- Investments in trade facilitating measures, including digital tools, can be win-win.
- Evolving landscape of measures creates challenges
  - Countries face different contexts – including nature of agrifood sector, methods of production and natural endowments, as well as cultural preferences
  - Concerns about competitiveness effects and environmental impacts if not everyone acts or acts in the same way
  - Debates over responsibility and roles, especially between developed and developing countries (e.g., on deforestation and LUC)
  - Trade wars can have detrimental impacts on food security. Uncertainty about the trading environment creates costs for business.
- More coordinated approaches could help create a level playing field and reduce trade costs associated with supply chain standards.



## Find out more

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Access all of the OECD's  
research and analysis on trade at:

[www.oecd.org/trade](http://www.oecd.org/trade)  
[www.oecd.org/agriculture](http://www.oecd.org/agriculture)  
[www.agri-outlook.org](http://www.agri-outlook.org)



You can reach us via e-mail by  
sending your message to:

[tad.contact@oecd.org](mailto:tad.contact@oecd.org)



We invite you to connect with us on  
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## Recent OECD work

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- OECD (2021), Making Better Policies for Food Systems, OECD Publishing, Paris, <https://doi.org/10.1787/ddfba4de-en>.
- OECD (2023), Policies for the Future of Farming and Food in the European Union, OECD Agriculture and Food Policy Reviews, OECD Publishing, Paris, <https://doi.org/10.1787/32810cf6-en>.
- OECD/FAO (2024), OECD-FAO Agricultural Outlook 2024-2033, OECD Publishing, Paris/FAO, Rome, <https://doi.org/10.1787/4c5d2cfb-en>.
- OECD (2024), Agricultural Policy Monitoring and Evaluation 2024: Innovation for Sustainable Productivity Growth, OECD Publishing, Paris, <https://doi.org/10.1787/74da57ed-en>.
- OECD (forthcoming), *Towards reliable and widespread carbon footprints in food systems*, OECD Publishing, Paris.
- Frezal, C. and A. Deuss (forthcoming), “Trade-related measures linked to the environmental sustainability of agriculture: a stocktake and typology”, *OECD Working Paper*, OECD Publishing, Paris.





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