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A MULTI-BILLION-DOLLAR OPPORTUNITY

Repurposing agricultural support to transform food systems

IN BRIEF



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PUBLISHED BY
THE FOOD AND AGRICULTURE ORGANIZATION OF THE UNITED NATIONS
UNITED NATIONS DEVELOPMENT PROGRAMME
AND
UNITED NATIONS ENVIRONMENT PROGRAMME
ROME, 2021

Required citation:

FAO, UNDP and UNEP. 2021. *A multi-billion-dollar opportunity – Repurposing agricultural support to transform food systems. In brief*. Rome. <https://doi.org/10.4060/cb6683en>

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ISBN 978-92-5-135119-2



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KEY MESSAGES

- ▶ Agricultural support is not providing desirable results for sustainability and human health, but repurposing it can be a game changer. It offers governments an opportunity to optimize the use of scarce public resources to transform food systems in ways that make them not only more efficient, but also more supportive of the SDGs.
- ▶ Globally, support to agricultural producers currently accounts for almost USD 540 billion a year, or 15 percent of total agricultural production value. This support is heavily biased towards measures that are distorting (thus leading to inefficiency), unequally distributed, and harmful for the environment and human health. Under a continuation of current trends, this support could reach almost USD 1.8 trillion in 2030.
- ▶ Phasing out the most distorting and environmentally and socially harmful producer support (i.e. price incentives and fiscal subsidies tied to the production of a specific commodity) is essential, but this will not bear fruit if resources are not redirected towards investments for the provision of public goods and services for agriculture (i.e. research and development and infrastructure) and to decoupled fiscal subsidies.
- ▶ Any repurposing strategy is dependent on a range of factors and country-specific circumstances, involving policymakers and all relevant stakeholders through public outreach and communication strategies to ensure buy-in and policy coherence across all food systems components. This includes measures to mitigate negative short-term impacts especially for the most vulnerable groups, including smallholder farmers, many of whom are women.

- ▶ Six steps governments may follow to develop and implement a repurposing strategy include: estimating the support already provided; identifying and estimating the impact of the support provided; designing the approach for repurposing agricultural producer support, including identifying needed reforms; estimating the future impact of the repurposing strategy; reviewing and refining the repurposing strategy, prior to implementation; and monitoring the outcomes of the new agricultural producer support.

- ▶ A few countries have begun repurposing and reforming agricultural support, but action needs to be broader, bolder and faster worldwide. The time has come for greater collaboration and cooperation across government, research institutions, non-governmental organizations and the private sector to develop the evidence on which successful repurposing strategies can be built. The United Nations Food Systems Summit 2021 and other subsequent forums present a momentous opportunity to spearhead action in this direction.



FOREWORD

With eight years remaining, we are falling far short of the trajectory needed to achieve the Sustainable Development Goals (SDGs), and to halve global greenhouse gas emissions in line with the Paris Agreement. As evidence from the Intergovernmental Panel on Climate Change clearly reveals, we are not acting fast enough or comprehensively enough to deliver these commitments in a world that has been further challenged by the health crisis and unprecedented socio-economic impacts of the COVID-19 pandemic.

The international community – including the three United Nations agencies we represent – recognizes that the transformation of our agri-food systems can be a catalyst to building forward better for the post-COVID-19 era. Transforming agri-food systems so that they become healthier, more sustainable, equitable and efficient involves several strategies. This report addresses one critical entry point, namely rethinking and updating the approach used to support agricultural producers.

Agriculture is the ultimate source of our food, feed and fuel, and for millions of farmers, including 500 million smallholder farmers worldwide – many of whom are women – it is the main source of their livelihood. It drives economic activity throughout our agri-food systems, including production, aggregation, processing, distribution and consumption. Agriculture and agri-food systems have a critical role to play in ending poverty in all its forms, eradicating hunger, achieving food security and improved nutrition, and reducing inequalities.

The policies that shape how and where we use land and other natural resources to feed the world's population have extraordinary potential to promote healthy consumption and sustainable production patterns which, in turn, are key to reducing emissions and protecting our planet and its biodiversity.

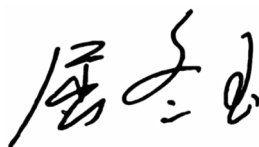
As this report demonstrates, the way governments around the world support agriculture is a factor in the global and environmental challenges that agri-food systems are facing. Current support to agricultural producers

worldwide works against the attainment of the SDGs, the targets of the Paris Agreement and our common future. This support is biased towards measures that are harmful and unsustainable for nature, climate, nutrition and health, while disadvantaging women and other smallholder farmers in the sector. At a time when many countries' public finances are constrained, particularly in the developing world, global agricultural support to producers currently accounts for almost USD 540 billion a year. Over two-thirds of this support is considered price-distorting and largely harmful to the environment.

This report highlights how coherent policymaking for agriculture can result in significant benefits for the sector, the environment and human health. By providing evidence on the potential positive impacts of eliminating harmful agricultural support, it makes a convincing case for repurposing such support – rather than eliminating it altogether. The report presents six steps that governments can consider to develop and implement agricultural support repurposing strategies, while also recognizing that there is no one-size-fits-all solution, and that an optimal repurposing strategy will depend on many factors and on country context.

We urge countries to seize this opportunity and consider options for repurposing agricultural support. Parliamentarians, decision makers, farmers, manufacturers, producers, distributors, consumers, and all other agri-food systems stakeholders, including women, youth, Indigenous Peoples and local communities – all of us must organize to steer our agricultural support away from its current trajectory.

The UN Food Systems Summit, the post-2020 Global Biodiversity Framework at the Conference of the Parties (COP) to the Convention on Biological Diversity (COP15) and the COP26 to the UN Framework Convention on Climate Change (UNFCCC) are milestone opportunities for countries to commit to this bolder path of action, and to prepare repurposing strategies for which our organizations can provide support.



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CURRENT AGRICULTURAL SUPPORT POLICIES ARE STEERING US AWAY FROM ACHIEVING THE SDGS AND THE GOALS OF THE PARIS AGREEMENT. BUT THERE IS STILL TIME TO REPURPOSE AGRICULTURAL SUPPORT TO DRIVE A TRANSFORMATION TOWARDS HEALTHIER, MORE SUSTAINABLE, EQUITABLE AND EFFICIENT FOOD SYSTEMS

Food systems¹ are vital for the 2030 Agenda for Sustainable Development. They support ending poverty, eradicating hunger, achieving food security, improving nutrition, promoting sustainable agriculture, fostering sustainable consumption and production, combating climate change, nurturing nature, and reducing inequalities. However, public support mechanisms for agriculture are not helping to improve the conditions under which food is produced; indeed, they are actively steering us away from achieving the SDGs and the goals of the Paris Agreement.

Food systems and the agriculture sector have made impressive strides in producing food to feed a growing population, reducing real food prices in many countries, improving food safety and reducing food-borne illnesses. However, food systems are also contributing to – and facing the consequences of – complex global and environmental challenges including climate change, environmental degradation and natural resource constraints.

The State of Food Security and Nutrition in the World report in its 2021 edition indicates that the world is not on track to eradicate hunger, food insecurity and malnutrition in all its forms by 2030. After remaining virtually unchanged for five years, the prevalence of undernourishment (PoU) increased by 1.5 percentage points in 2020 – reaching a level of around 9.9 percent. In 2020, over 720 million people in the world faced hunger, and nearly one in three people in the world (2.37 billion) did not have access to adequate food. Healthy diets

¹ Agri-food systems is a term increasingly used in the context of transforming food systems for sustainability and inclusivity. Agri-food systems encompass both agricultural and food systems and focus on both food and non-food agricultural products, with clear overlaps. While broader agri-food systems transformation is of utmost importance – hence the reference to it in the Foreword, this report focuses only on food systems.

were out of reach for around 3 billion people, especially the poor, in every region of the world in 2019. At the same time, population growth is resulting in an ever-increasing demand for food. These challenges have been exacerbated by the COVID-19 pandemic, which risks overwhelming food systems.

Government agricultural support policies are not fit for today's food systems

As this report demonstrates, the way governments around the world support agriculture is a factor in the global and environmental challenges that food systems are facing. While not accessible to all producers, agricultural producer support in particular has led to some farming practices that are harmful to nature and health and largely focused on certain commodities, thus hindering the health, sustainability, equity and efficiency of food systems.

Against this backdrop, agricultural producer support needs to be repurposed and reformed to support a transformation of our food systems and the achievement of the SDGs. Repurposing is defined in this report as the reduction of agricultural producer support measures that are inefficient, unsustainable and/or inequitable, in order to replace them with support measures that are the opposite. This means agricultural producer support is not eliminated but reconfigured. In this way, repurposing will always imply reforming.

By repurposing agricultural producer support, governments can optimize scarce public resources to support food systems in ways that make them not only more efficient, but also more supportive of healthy lives, nature and climate. This can also be an opportunity to achieve a strong economic recovery in a post-COVID-19 pandemic world.

This report provides policymakers with an analysis of agricultural support globally and by country income group over time, along with a six-step guide on how to repurpose agricultural producer support – and the reforms required – to better support the transformation of our food systems and the achievement of the SDGs.

AGRICULTURAL PRODUCER SUPPORT TODAY FAVOURS POLICIES THAT ARE DISTORTING AND HARMFUL TO THE ENVIRONMENT AND HUMAN HEALTH

This report provides an updated estimate of agricultural producer support in the world, covering 88 countries. Support to producers makes up the lion's share of all agricultural support and is thus the focus of the report. Between 2013 and 2018, net support to agricultural producers individually averaged almost USD 540 billion per year – representing around 15 percent of total agricultural production value. Of this, about USD 294 billion was provided in the form of price incentives and around USD 245 billion as fiscal subsidies to farmers, the majority (70 percent) being tied to the production of a specific commodity. Only USD 110 billion was used to fund transfers to the agriculture sector collectively, in the form of general services or public goods (Figure 1).

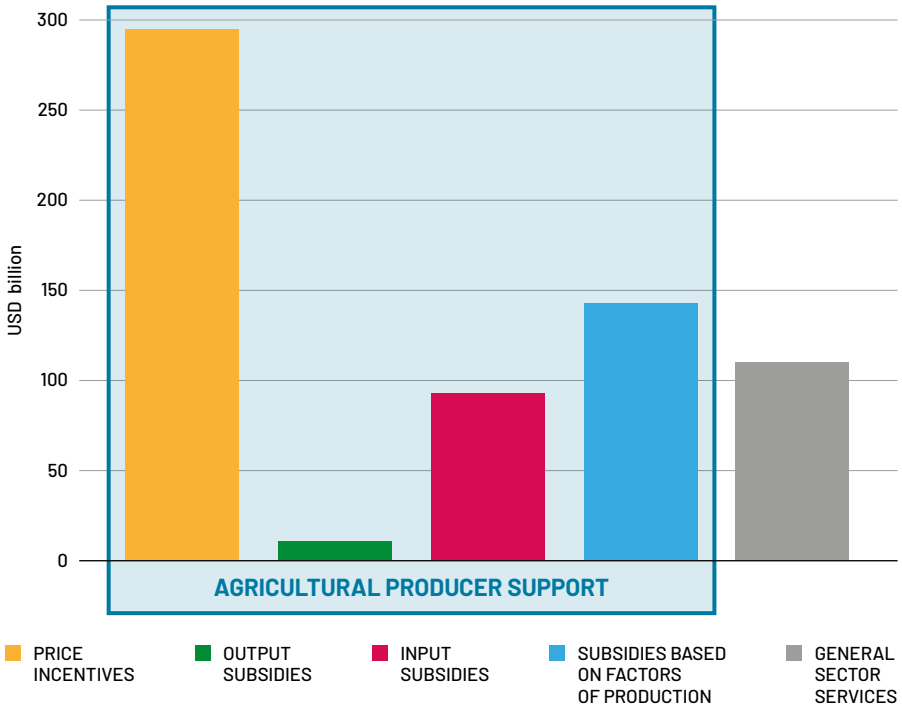
Agricultural producer support measures can have negative effects

Price incentives and fiscal subsidies are forms of support that may have significant negative implications on food systems, as they incentivize production practices and behaviours that might be harmful to the health, sustainability, equity and efficiency of food systems.

Price incentives are the result of border measures (e.g. import tariffs and export subsidies) that generate a gap between the domestic producer price and the border price of a specific agricultural commodity. These measures, while favouring some producers (e.g. of certain crops), can potentially distort food trade, production, and consumption decisions. Similarly, fiscal subsidies linked to the production of a specific commodity (coupled subsidies) can lead to negative environmental outcomes (e.g. through overuse of agrochemicals and natural resources and the promotion of monoculture) and nutritional outcomes (e.g. by disproportionately fostering production of staples versus fruits and vegetables). These subsidies also drain public resources that could be invested instead in areas where returns are higher and benefits more long lasting, thus hindering efficient and more sustainable use of often-limited public funds.

► **FIGURE 1**

Level and breakdown of global agricultural sector support (average 2013–2018)



Note: This figure is available in the full report as Figure 4.

Source: Authors' own calculation based on data from Ag-Incentives. (forthcoming). Ag-Incentives Consortium database. In: *Ag-Incentives* [online]. Washington, DC. [Cited 3 August 2021]. <http://ag-incentives.org/indicator/nominal-rate-protection>

Support coupled to production can ultimately hamper sustainable market development, trigger price shocks at a global scale, incentivize the production of emission-intensive products, or penalize the availability and affordability of more diversified and nutritious food, particularly for the poorest consumers. On the contrary, subsidies not tied to the production of a specific crop and fiscal transfers for the provision of general sector services are the least distorting measures,

and less likely to increase pressures on sustainability. This type of support does not influence the type or volume of agricultural production, thus allowing for decisions that are more efficient.

Emission-intensive and unhealthy commodities receive the most support

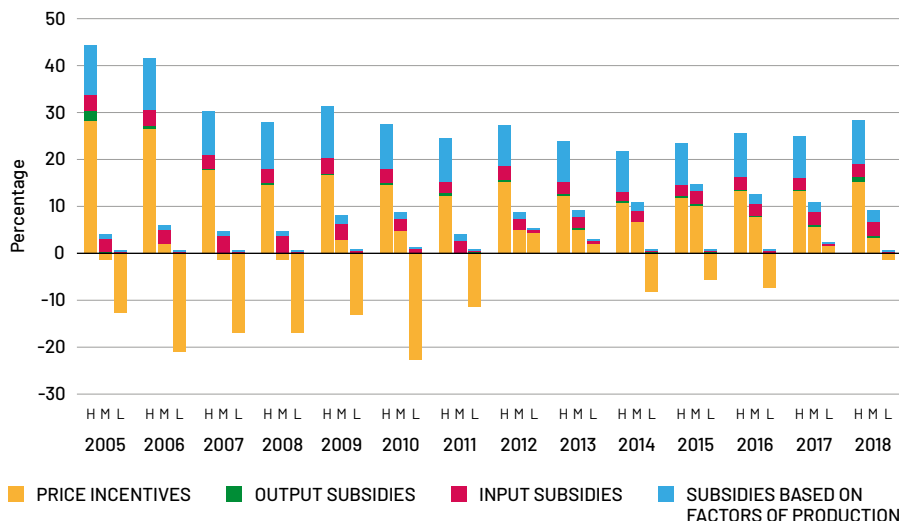
The report finds that unhealthy products, like sugar and emission-intensive commodities (e.g. beef, milk and rice) receive the most support worldwide, despite the potentially negative impacts on health as well as on climate change adaptation and mitigation, and the (relative) disincentives this support creates towards producing healthier and more nutritious foods, such as fruits and vegetables. The negative repercussions on the climate are particularly relevant for high- and upper-middle-income countries that consume more dairy and meat products per capita than poorer countries. In least developed countries, where the production of staple foods (i.e. cereals) receives the highest rates of support, farmers have fewer incentives to diversify production towards more nutritious foods.

Distorting support measures are still prevalent in high- and middle-income countries

The way countries support their agriculture sector varies widely according to their policy objectives, and tends to change as countries develop. Price incentives and fiscal subsidies tied to production are – and have been – the most widely used in high-income countries (e.g. European Union Member States). Such support accounted for over 40 percent of global agricultural production value in 2005, but the trend since then has been mostly downward (**Figure 2**). Conversely, since the early 1990s, these distorting measures have become more prominent in some middle-income countries with notable emerging economies (e.g. China, Colombia, Indonesia, Philippines and Turkey). Price incentives and other coupled support, especially input subsidies, now account for over 10 percent of agricultural production value in these countries, on average (**Figure 2**). However, in other middle-income countries (e.g. Argentina, Ghana and India), rates of support to agricultural producers are still negative, as policies penalize farmers through low prices. This trend is similar to the one seen in most low-income countries (e.g. sub-Saharan Africa), where fiscal support is minimal, and the farming sector has been penalized (even more so in the past) by policies that keep food prices low to protect poor consumers.

The persistently strong reliance on agricultural producer support coupled to production clearly shows the need for commitment at country, regional and global levels towards repurposing strategies. Price distorting policies and subsidies tied to production decisions are still widespread, while most support worldwide is still given to commodities with the biggest environmental footprint. Even if some of these policies have been gradually phased out during the last decade in some countries and regions, they seem to be experiencing a resurgence more recently. More efforts are therefore required to reduce the most distorting and environmentally or socially harmful support, and to redirect resources towards investments in public goods and services for agriculture, such as research and development (R&D) and infrastructure.

► **FIGURE 2**
Nominal rate of assistance as percentage of production value, by type of support and income group



Notes: This figure draws from data presented in Chapter 2 of the full report. H = high-income countries; M = medium-income countries; L = low-income countries.

Source: Authors' own calculation based on data from Ag-Incentives. (forthcoming). Ag-Incentives Consortium database. In: *Ag-Incentives* [online], Washington, DC. [Cited 3 August 2021]. <http://ag-incentives.org/indicator/nominal-rate-protection>

THE PROJECTED IMPACTS OF ELIMINATING AGRICULTURAL PRODUCER SUPPORT MAKE A STRONG CASE FOR THE NECESSITY OF REPURPOSING, INCLUDING MEASURES TO MITIGATE NEGATIVE SHORT-TERM IMPACTS

Global support to farmers is projected to increase to almost USD 1.8 trillion in 2030 under a business-as-usual scenario that takes into account the expected economic recovery. About 73 percent of this (USD 1.3 trillion) would be in the form of border measures, which affect trade and domestic market prices. The remaining 27 percent (USD 475 billion) would be in the form of fiscal subsidies that support agricultural producers and could continue to promote overuse of inputs and overproduction.

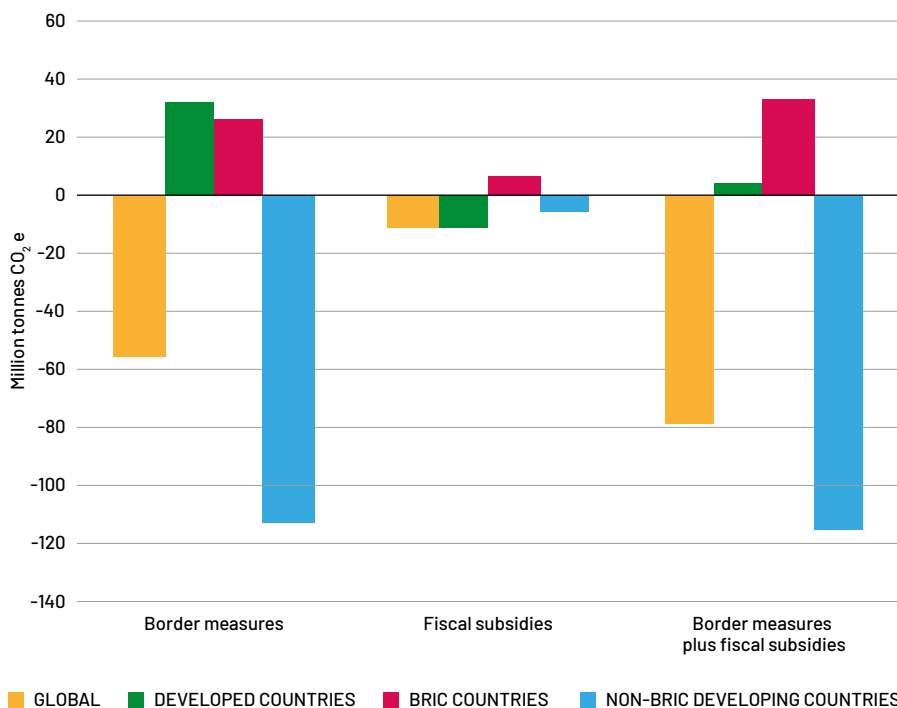
As demonstrated by this report's modelling analysis, simply removing agricultural support may have important adverse trade-offs. For example, in an extreme scenario whereby all agricultural support were removed by 2030 without being repurposed, GHG emissions are projected to fall by 78.4 million tonnes CO₂ e (Figure 3), but crop production, livestock farming production and farm employment are also projected to decrease by 1.3, 0.2 and 1.3 percent, respectively. Farm employment in emerging BRIC countries (Brazil, Russian Federation, India and China) could fall by 2.7 percent.

If border measures alone were eliminated globally, there would be an increase in crop and livestock production. However, there also would be a shift towards more confined feeding operations, with less deforestation and land conversion for pasture globally and an associated fall in GHG emissions of 55.7 million tonnes CO₂ e by 2030 (Figure 3). The impact on nutritious diets would be mixed, although (due to an increase in global farm income) the number of people undernourished would drop by 0.2 percent.

If agricultural fiscal subsidies alone were eliminated globally, there would be a reduction in agricultural production, resulting in fewer inputs (e.g. of previously subsidized agrochemicals) and land use (cropland and pastureland), helping to preserve nature and cutting emissions by an estimated 11.3 million tonnes CO₂ e by 2030 (Figure 3). However, this would likely hit consumers with higher food costs for a healthy diet and hurt farm incomes, especially for female-headed households and poorer households dependent on subsidies. The decline in farm income from a removal of agricultural subsidies, if not compensated, would push a small portion of the population in developing countries into extreme poverty, thus increasing the prevalence of undernourishment.

► **FIGURE 3**

Estimated changes in GHG emissions in 2030 due to removal of agricultural producer support



Note: This figure is available in the full report as Figure 19.

Source: Authors' own calculations based on MIRAGRODEP model estimates.

This analysis makes a strong case for repurposing rather than eliminating agricultural producer support. To minimize trade-offs and ensure a beneficial outcome overall, any fiscal savings from support reduction should be repurposed towards healthier, more sustainable, equitable and efficient ways of supporting agriculture. This includes measures to mitigate negative short-term impacts, such as cash transfer schemes, especially for the most vulnerable groups.

SIX STEPS TO DEVELOP A TAILORED REPURPOSING STRATEGY FOR AGRICULTURAL SUPPORT

Given the complex trade-offs with other policy areas and the interactions between policy objectives and impacts, any strategy for repurposing agricultural producer support needs to be systematically assessed both to ensure policy coherence across all stages of the food supply chain and in the intersection with other systems, and to leverage potential synergies. Such policy coherence cannot be stressed enough, and requires systems thinking at multiple levels (local to global) and efforts to reform all parts of the integrated food system with integrated assessments of agricultural support policies.

There is, therefore, no one-size-fits-all optimal repurposing strategy. A range of factors and country-specific circumstances will define what agricultural producer support measures are most conducive to healthier, more sustainable, equitable and efficient food systems. Nevertheless, this report provides governments with a six-step approach to developing a repurposing strategy that results in healthier, more sustainable, equitable and efficient global food systems (see [Figure 4](#)).

Key considerations for the repurposing process

A successful repurposing strategy needs to be holistic. This involves setting the right goals, understanding causes and effects, putting in place the right conditions to successfully implement the strategy (e.g. strengthened capacities, collaboration across ministries and transparent engagement with all relevant actors) and creating supportive investment opportunities. In order to gain wide acceptance of the proposed changes in agricultural support and of the needed reforms, a communication and engagement strategy targeting stakeholders and the general public form an important part of the overall repurposing strategy.

A transparent, multistakeholder approach is integral to the six-step repurposing process. Transparency and inclusive consultations are critical to address institutional bottlenecks and vested interests that could hinder reform and the effective implementation of the strategy. Reforming agricultural support raises concerns about reduced incomes and food affordability, and is likely to be opposed by farmers benefiting from the current system. It is therefore crucial to communicate that reforming agricultural policies is not about taking away support from farmers,

but about repurposing it so that it rewards good practices rather than perpetuating practices that threaten food systems stability, farmers' welfare and the environment.

► **FIGURE 4**

Six steps for repurposing and reforming agricultural producer support



Note: This figure is a simplified version of Figure 29 available in the full report.

Source: Authors' own elaboration.

The multistakeholder approach needs to ensure the inclusion of certain key actors. Smallholder farmers in particular, many of whom are women, make a significant contribution to addressing food security and nutrition and promoting resilience. Furthermore, women produce most of the food consumed locally, making small farms central for poverty reduction, gender equality and for women's empowerment in rural areas. Small farms are found to be more productive per acre than large farms, better for spurring surrounding economic growth, and better for ecosystem and biodiversity conservation. It is therefore critical to recognize the role of these actors and include them in agricultural repurposing policy processes if the shift to healthier, more sustainable, equitable and efficient food systems is to be successful.

Political economy considerations are also central to the design of effective agricultural support policies, as there will inevitably be winners and losers from formulating a repurposing strategy. In reforming policies, policymakers will need to best judge how negative short-term impacts and trade-offs can be mitigated, especially for vulnerable groups (e.g. through cash transfers). Where appropriate, specific compensatory measures should be considered for individuals/businesses who face higher costs, or even unemployment, as a result of repurposing and reform measures. At the same time, repurposing and reforming should make the most of potential synergies that benefit both farmers and consumers. For example, if farmers are incentivized to diversify into the sustainable production of more nutritious foods, this shift will have a greater payoff if combined with measures that encourage consumers to buy these foods through awareness of the health benefits of eating them over time.



THE UN FOOD SYSTEMS SUMMIT AND THE GLOBAL FORUMS THAT FOLLOW: A MOMENTOUS OPPORTUNITY FOR CHANGE

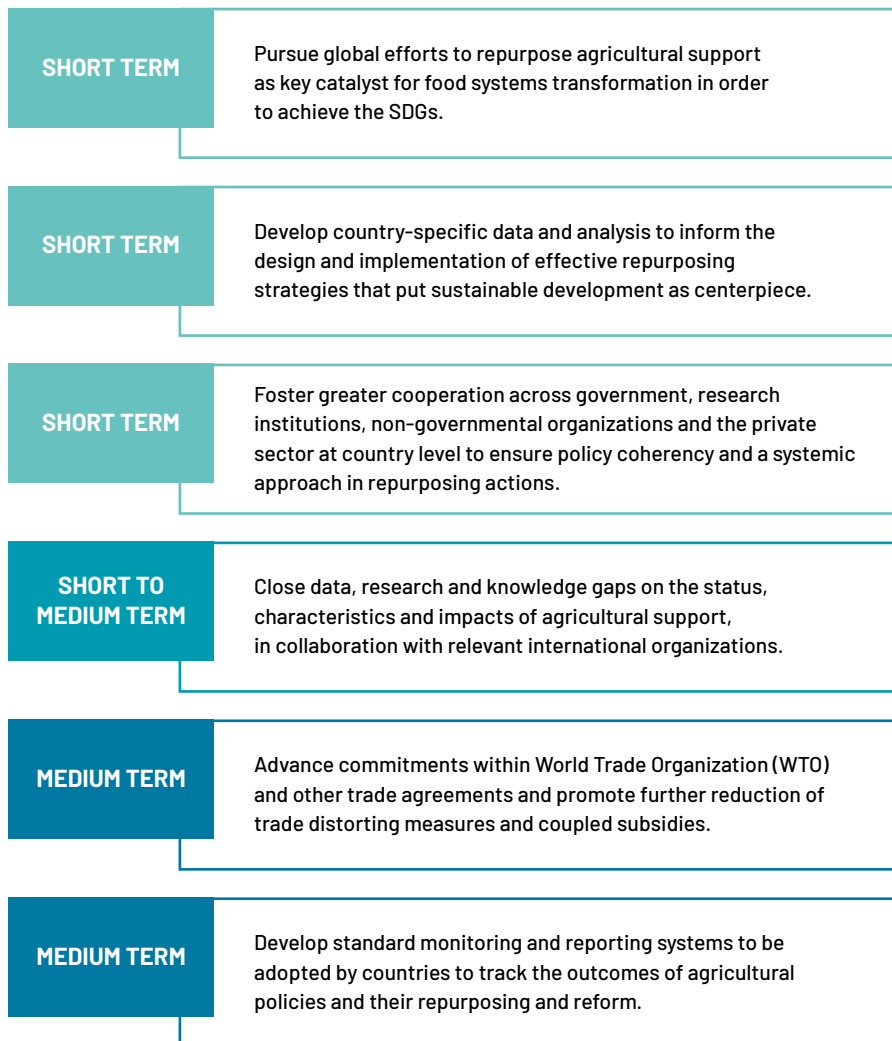
The transformation to healthier, more sustainable, equitable and efficient food systems needs to be accelerated if we are to meet the SDGs. While a few countries have started repurposing and reforming their agricultural support, broader, deeper and faster reforms are needed for food systems transformation. However, there is no bigger opportunity for countries to commit to repurposing of harmful support policies than at the UN Food Systems Summit in September 2021. The summit will gather global leaders, policymakers and the general public, thus providing a momentous opportunity to determine how to come to an agreement to transform our food systems. Repurposing agricultural support should therefore be on top of the agenda at this event.

The momentum for transformation should continue into October and November and beyond. Actions from the Food Systems Summit should feed into efforts to eliminate incentives harmful to biodiversity, which can then be brought to the post-2020 Global Biodiversity Framework at the fifteenth meeting of the Conference of the Parties to the Convention on Biological Diversity (COP15) in October 2021. The COP26 to the UN Framework Convention on Climate Change (UNFCCC) in November 2021 is another major opportunity to cement country commitments to working towards the elimination of harmful and distorting agricultural support policies. The decisions and commitments made at these global forums and in the coming years will either support or hinder at least 12 of the 17 SDGs.

These high-profile global events can drive the needed repurposing of agricultural support for healthier, more sustainable, equitable and efficient food systems. They must be used to leverage urgent action on several fronts, both in the short and in the longer term (see [Figure 5](#)).

► **FIGURE 5**

Recommendations to leverage action towards repurposing agricultural support



Note: This figure draws from the recommendations listed in Chapter 5 of the full report.

Source: Authors' own elaboration.

In the short term, after the global summit and at the country level, focus should be placed on developing a better understanding of the impacts of existing agricultural support policies as a first step to informing a repurposing strategy. Repurposing should begin by phasing out the most distorting and damaging policies for nature, climate, nutrition, health and equity. In order to achieve policy coherence, greater collaboration and cooperation across stakeholders in government, research institutions, non-governmental organizations and the private sector should also be a priority. Furthermore, moving from the short to the medium term key knowledge and research gaps need to be addressed in collaboration with relevant international organizations, including UN agencies and research think tanks.

In the medium term, the trade community can play an important role in pursuing further reform of border measures and coupled subsidies, which account for a significant and highly distorting part of overall agricultural support. A concerted effort by the WTO members is required to update agricultural trade rules and commitments and make them more conducive to sustainable food systems transformation.

Finally, there is a call to improve and develop standardized monitoring and reporting of agricultural support that countries can adopt. This is important to enable governments to monitor how public funds are spent, identify trends and better align spending and support policies with national and global objectives in the realms of poverty, nature, climate, nutrition, health and equity, and also to support the political commitments made in the SDGs and the Paris Agreement.

The process of transformation to healthier, more sustainable, equitable and efficient food systems has several entry points. This report has argued that one of the key entry points to this process is to rethink and update the approach used to support agriculture, which is the backbone of food systems. Agricultural producer support has created massive inefficiencies and distortions, leading to unacceptably high costs for nature, climate, nutrition, health and equity. For many countries with strained public purses, this support is not sustainable. Therefore, given the state of the environment and human health needs, a key step towards transforming food systems is to revisit and repurpose the policies that shape agricultural production, with the strong backing of governments worldwide.



A MULTI-BILLION-DOLLAR OPPORTUNITY

Repurposing agricultural support to transform food systems

Public support mechanisms for agriculture in many cases hinder the transformation towards healthier, more sustainable, equitable and efficient food systems, thus actively steering us away from meeting the Sustainable Development Goals and targets of the Paris Agreement. This report sets out the compelling case for repurposing harmful agricultural producer support to reverse this situation, by optimizing the use of scarce public resources, strengthening economic recovery from the COVID-19 pandemic, and ultimately driving a food systems transformation that can support global sustainable development commitments.

The report provides policymakers with an updated estimate of past and current agricultural producer support for 88 countries, projected up until 2030. The trends emerging from the analysis are a clear call for action at country, regional and global levels to phase out the most distortive, environmentally and socially harmful support, such as price incentives and coupled subsidies, and redirecting it towards investments in public goods and services for agriculture, such as research and development and infrastructure, as well as decoupled fiscal subsidies. Overall, the analysis highlights that, while removing and/or reducing harmful agricultural support is necessary, repurposing initiatives that include measures to minimize policy trade-offs will be needed to ensure a beneficial outcome overall.

The report confirms that, while a few countries have started repurposing and reforming agricultural support, broader, deeper and faster reforms are needed for food systems transformation. Thus, it provides guidance (in six steps) on how governments can repurpose agricultural producer support – and the reforms this will take.

The report proposes greater collaboration and cooperation across government, research institutions, non-governmental organizations and the private sector to generate the evidence needed for the development and implementation of repurposing strategies. It observes that the United Nations Food Systems Summit in September 2021 is a momentous opportunity to generate a groundswell of support for repurposing. This momentum then needs to continue to build through the Conference of the Parties to the Convention on Biological Diversity (COP15) in October 2021 and the COP26 to the United Nations Framework Convention on Climate Change (UNFCCC) in November 2021. The decisions and commitments made at these global forums and in the coming years will either support or hinder at least 12 of the 17 Sustainable Development Goals.



Full report available at
<https://doi.org/10.4060/cb6562en>