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T7 Task Force Sustainable Economic Recovery

POLICY BRIEF

SUSTAINABLE AND RESILIENT AGRICULTURAL VALUE CHAINS: ADDRESSING MULTIPLE VULNERABILITIES WITH A NEW PARTNERSHIP APPROACH

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Abstract

The ongoing Covid-19 pandemic and the war in Ukraine meet longer-term impacts of climate change and no-less pressing challenges of social and environmental sustainability in and around agriculture, food and nutrition security.

Many international mechanisms are already in place for agriculture and food systems. They are, however, not (yet) sufficiently coordinated, and there are gaps in terms of addressing the above-mentioned objectives: safeguarding food security and promoting sustainability. Due diligence laws, as a new type of policy approach, have recently been initiated by many industrialized countries to improve social and environmental conditions in (agricultural) supply chains. However, these regulations also bear the risk of generating unintended negative consequences, particularly for smallholder farmers in poor countries.

Against this background, the T7 puts forward four proposals at different degree of specificity: 1) Reacting to geopolitical risks: Immediate and long-term measures to safeguard food security in light of Russia's war against Ukraine; 2) Balancing and integrating food security and sustainability; 3) Initiating an observatory on new due diligence measures as one concrete step in that direction; 4) Striving towards better integrated global governance of agriculture and the food system, and Initiating a strategic partnership with African countries.

Challenges

In light of the Covid-19 pandemic and the war in Ukraine in combination with longer-term challenges of climate change, biodiversity loss and other planetary boundaries but also in light of the long-term global food and nutrition security problems, it is time for renewed action by the G7. It is the most powerful and economically advanced global country block, with many stakes in these issues and thus well suited to make a first step for global action. However, as food and agriculture are of particular importance and sensitivity to most developing countries and many sustainability issues can only be solved in these countries, a serious partnership approach with fair and trustful cooperation at eye level must be strived for between the G7 and the Global South.

The Covid-19 pandemic has revealed substantial vulnerabilities in many global supply chains. High geographic and supplier concentration, low degrees of diversification, and just-in-time supply and production have made value chains in many sectors vulnerable to external shocks, such as extreme weather, seismic events, and geopolitical tensions. Value chain security was thus one of the priority areas of the UK G7 Presidency. The focus was, however, mostly on industrial value chains. But although agriculture proved to be a stability anchor at many local levels, agricultural trade and food systems were disturbed in manifold ways which negatively affected vulnerable countries in particular. There are alarming signals that Covid-19 and the counter-measures such as lockdowns and travel restrictions had serious consequences for food markets and food and nutrition security. Since mid-2020, food prices climbed to the highest levels since the food price crisis in the period 2007-2011. According to the World Bank (2022), the Agricultural Commodity Price Index was 35 percent higher in February 2022 than its January 2021 level. Maize and wheat prices were 26 percent and 23 percent higher, respectively. It is estimated that around 118 million more people were facing chronic hunger in 2020 than in 2019 and nearly 2.37 billion people (or 30% of the global population) lacked access to adequate food in 2020 – a rise of 320 million in just one year.

The likely consequences of Russia's invasion of Ukraine underlines that more attention needs to be placed on global food security resilience, in this case to geopolitical risks and their effects on agricultural value chains. The Ukraine, Russia and its ally Belarus are major suppliers of many commodities such as wheat, maize, barley, and vegetable (sunflower) oil as well as on some fertiliser and respective raw materials (FAO 2022). In the short run, direct importers from these countries are most affected. In the medium term, also other countries will be affected by the global food price hikes but also through other mechanisms such as high input and energy prices. Brazil for instance is importing about one quarter of its fertilisers from Russia which in turn means that the most important source of revenues as well as an important source of global supply of agricultural products is at risk¹. Many of the affected countries are already food insecure and some are politically sensitive to the food price hikes, particularly in North Africa and the middle East (e.g. Lebanon, Egypt) (von Cramon-Taubadel, 2022). High food price inflation thus does not only mean more hunger and less nutritious food intake, but also risks to create food riots, political instability and new security crises.

At the same time, agriculture and food systems are increasingly perceived as the pivot of many sustainability challenges and solutions. The Agriculture, Forest and Other Land Use (AFOLU) sector is responsible for just

under a quarter of anthropogenic GHG emissions mainly from deforestation and agricultural emissions from rice production, livestock, soil and nutrient management (Smith et al. 2014). Agriculture is also the largest user of water resources and a key polluter of water bodies through nitrogen and phosphate leakages, and the biggest threat to biodiversity (FAO 2021; Gerten et al. 2020). Additionally, the sector is seriously suffering from the effects of climate change, while it is uniquely able to sequester large amounts of carbon in biomass and in the soils and create sustainable landscapes and biodiversity (Smith et al. 2018). As to socio-economic sustainability, about 70-80% of the poor and of food insecure households are smallholder farm families (IFAD 2021, FAO et al. 2021). Child labour in agriculture accounts for almost 100 million children or more than 60 percent of all known cases in any sector². More generally, working conditions of smallholder farmers and agricultural workers are often most worrying (IFAD 2021). Labour, social and environmental conditions are also precarious on many smallholder farms who supply into export value chains (Meemken et al. 2021) – about one fifth of all smallholders are engaged in such cash crops as a part of their farming systems (Adjognon et al. 2017). On the other hand, regional and global agricultural value chains offer great potential to improve their socio-economic sustainability and therefore advance income opportunities for smallholders through inclusive business models as endorsed by the G20³. Women have particularly important but locally different roles in agriculture and food systems.

To meet the growing food demand of an estimated 9.7 billion people in 2050 and to support decarbonization, sustainable and nutritious food production but also the non-food bio-economy need to increase significantly, and trade in agriculture needs to become more crisis-proof. At the same time, losses along the value chains and consumption patterns have to change to dampen the needs for production increases. Sustainability has to be improved at production, processing, trade and consumption levels as well as through recycling, i.e. in a (food) systems perspective. The private sector, including farmers, are key players in these systems.

Many partial international coordination mechanisms and international policy frameworks are in place on agricultural policy, food security, value chains and environmental issues. These include the Food and Agriculture Organisation (FAO) – and the linked standards setting bodies Codex Alimentarius Commission, World Organization for Animal Health (OIE), the World Trade Organisation with two special Agreements on Agriculture and on Sanitary and Phytosanitary Standards, the International Plant Protection Convention (IPPC), the Committee on World Food Security (CFS), the World Food Programme (WFP), the Consultative Group on International Agricultural Research (CGIAR) and others. In many other international organisations, additional aspects are negotiated and regulated, for instance the mentioned issues of climate change, biodiversity, soils and drought, water and other environmental issues, labour standards, price speculation, health aspects and nutrition, inclusive business models, investments, and others.

All these regulations are, however, not (yet) sufficiently coordinated, and there are still gaps in addressing all challenges. One new type of policies which try to address sustainability gaps are due diligence laws which have recently been initiated by many industrialized countries. G7 countries including Germany (and the European Union) are among them (EU Commission 2021 and 2022). These laws attempt to improve the social and environmental conditions of production along the supply chains into their territories by making the economic entities responsible for improvements and violations of respective standards along their supply chains. In many developing countries, agriculture is particularly affected due to the size of the sector, the

high number of (smallholder) farmers involved, and the (still) comparative advantages of the sector in these countries. Yet, these approaches do not only promise to improve production conditions but also risk to do harm in particular to the millions of smallholder farms for whom it is difficult, particularly costly and sometimes impossible to comply and to prove or get certification of compliance. They risk to drop out or to be abandoned. In principal, some initiatives foresee such risks and provide for support, however often at a very general level (e.g. the EU COM proposal on deforestation, Art. 32 on review (EU Commission 2021) and the COM proposal on due diligence in Art. 7 on unintended effects (EU Commission 2022)). Risks from individual laws are compounded by the high number, overlaps and lack of coordination and harmonization of these and other agricultural trade-related laws.

In summary, despite or exactly because of the dispersed and scattered institutional governance landscape including the new due diligence laws, a lot remains to be done to achieve better governance of the broader agricultural and food system. There are many (partially) conflicting goals around agriculture and food systems, and the power of different actors is very diverging. Therefore, coordination and predictability, as well as fair burden sharing is important. The UN food system summit in 2021 organised by the Secretary General has been an attempt to bring the various issues under one roof, but fell short of creating overarching and stable structures. A coordinated global agriculture and food system governance should focus on two dimensions: food security and sustainability.

The multiple crises provide not only a challenge but the necessity and thus a window of opportunity to tackle longstanding barriers of overarching changes beyond just reactive adjustments. G7 is a relevant forum in light of high market shares in agricultural imports and exports as well as by their important, often dominant role in all international policy frameworks mentioned above, and by their convening power. However, allies have to be involved in a partnership approach, in particular the G20 and the global (UN) institutions.

Proposals

Practical policy recommendations presented in this section are mainly addressed to G7 members but could also inspire discussions in other international fora.

1. Reacting to geopolitical risks: Immediate and long-term measures to safeguard food security in light of Russia's War on Ukraine

As the G7 Agricultural Ministers already noted at their extraordinary meeting on the 11th of March, both short- and long-term solutions are needed to react to potential food deficits, particularly in vulnerable countries now and in the current year and to be prepared for larger effects in the medium term.

In the short run, direct measures proposed by the Meeting of the G7 Agriculture Ministers⁴ should be more explicitly detailed and spelled out by the G7:

- An actual and immediate commitment to increasing both food and fertilizer aid for affected countries and coordination of this assistance among the G7 countries.
- Undertaking a rapid assessment of options for additional food supply by supporting adjustments on production and consumption in G7 countries, e.g. where suitable, support channelling of fodder and agrofuel feedstocks to human consumption.
- Ensuring open and possibly protected transport routes with priority for humanitarian and food transport and support shipping lines to safeguard delivery e.g. by supporting insurance schemes.
- Considering negative effects on food security for vulnerable import countries when deciding on further sanctions and encourage private companies to do the same, avoiding to cause serious harm to third party vulnerable countries.
- Stronger options to avoid export restrictions on food e.g. by clearly condemning deviations within and outside the group.

In the longer run, the G7 should focus on the following measures to better prepare for geopolitical challenges:

- Establishing a joint task force combining security, transport and food expertise to better address interlinkages.
- Explicitly integrating security-linked risks in the existing Agricultural Information Market System (AMIS), e.g. by integrating dominant chokepoints for shipping routes and by extending existing vulnerability assessment frameworks (such as FAO and WFP or FEWSNET).
- Inviting vulnerable countries to identify their specific vulnerability e.g. to geo-political challenge in order to be able to consider their specific needs.
- Supporting initiatives to increase agricultural and food production and improve food systems in African countries.
- Investing in global food supply buffers by supporting food stocks and designing fodder and agrofuel feedstock supply chains for such a purpose, assuring that stability of food supply has priority.

- Supporting regional coordination across vulnerable countries e.g. by strengthening joint stock systems like the ones started in West Africa after the last food price crisis⁵.
- Assessing acute appropriateness of international instruments for supporting low income and especially vulnerable countries to pay sky-rocketing food import bills (in particular IMF's Poverty Reduction and Growth Trust Facility and Exogenous Shocks Facility⁶).

2. Balancing and integrating food security and sustainability

The need to react to the recent war in the Ukraine and the resulting food crisis initiated a renewed policy debate on re-evaluating the objectives of sustainability and self-sufficiency in essential goods like food. For this, these aims and according instruments must be re-assessed, including international trade policy. To avoid mistakes like falling back into protectionisms which “*beggar-thy-neighbour*”, creating new vulnerabilities to internal shocks such as droughts or undermining sustainability while solely focussing on productivity, an open debate and accompanying academic work on trade-offs is needed. The G7 can play a key role in helping to strike a balance between food security and sustainability for themselves, for different types of developing countries and at the global level.

The G7 should *generally support* a better balance by:

- Offering an open, interdisciplinary option for debate in the G7 fora (e.g. T7) on a continuous basis.
- Identifying relevant trade-offs between different policy goals like supply security and ecological sustainability.
- Offering a partnership discourse to address how different types of countries can face different vulnerabilities.
- Re-thinking trade-offs in (food, feed, agrofuel feedstocks, biomass and other bio-based material) industries with major aim to “do not harm but support food security” in a risk-aware framework, since feedstock compete with human consumption but also constitute a buffer in times of crisis.
- Debating and creating public and policy awareness about the need for region-specific strategies for sustainable land use.

Specific measures the G7 should take include:

- Considering flexibility mechanisms to be able to react on unforeseen crises like the Russian invasion or natural disasters without the need to completely overhaul existing policies through contingency planning (e.g. by changing set aside rules as part of domestic agricultural policy in specific situations).
- Re-evaluating food subsidies' criteria so far focussed on market effects (e.g. by OECD and WTO).
- Continuing WTO reforms to bind export restrictions to clear criteria and time limitation, including consideration of mandatory consultation requirements and binding ad hoc arbitration procedures.
- Phasing out existing trade remedies (e.g. anti-dumping and countervailing duties) imposed on critical inputs for farmers such as fertilizers which lead to higher costs for agricultural producers (e.g. antidumping duties imposed by the US on fertilizers coming from Morocco).

- Seeking better coordination between food security, climate change and biodiversity measures (e.g. agrofuels, forestry conservation or soil carbon policies). This should also create renewed attention to landscape approaches as key planning tools for integrated land use.

To promote these proposals, different countries' representatives with different sets of vulnerabilities (net-food/fuel importing countries, fragile states and developing economies) should be invited to the G7. The above-mentioned issues could be supported by institutions focusing on agricultural research e.g. like CGIAR, IFPRI, IIASA or OECD.

3. Initiating a joint observatory on new due diligence measures

New due diligence laws are potentially very powerful tools that create new options and political drive for more ecological and social sustainability in agricultural supply chains. However, they also entail big risks of generating unintended negative consequences, particularly for smallholders in poor countries. These effects deserve particular attention and should be monitored from the very beginning.

The G7 should focus on:

- Determining the status of existing due diligence laws and how they affect agricultural value chains, also in conjunction with other due diligence and other laws.
- Establishing an observatory on risks of unintended effects by different due diligence laws jointly with partner countries and actors potentially affected by G7 countries initiatives, with a focus on selected (agricultural) sectors.
- Mandating an appropriate organisation for running the observatory and continuously observing the effects, complemented by a joint research programme with mostly affected partner countries.
- Committing more and more concrete mechanisms within or parallel to the due diligence initiatives to overcome certain identified risks, e.g. by offering transition phases, capacity support, complaint mechanisms or compensation.
- Engaging countries in the Global South to link external due diligence laws with their own regional and national policy instruments, for example on the promotion of inclusive business, to mitigate negative effects and leverage the opportunities that sustainable agricultural supply chains offer in terms of poverty alleviation.

Representatives from delivering countries and especially small farmers may be invited to G7 meetings to identify first relevant elements to be considered. As the German and the EU initiatives are new and anyhow envisage respective review mechanisms, European G7 states may take the lead. The observatory would be a concrete step in direction to a more integrated global governance of agriculture and food systems.

4. Starting a process to improve aligned global governance for agriculture and food systems

The previous recommendations indicate the need for actions by and across multiple agencies. In order to create more coordinated and balanced decisions about contentious issues, a more tuned global governance

is necessary. Existing bodies, including FAO and CFS are not able to fulfil that difficult task because their mandates, capacities and operational mechanisms are immanently limited to specific tasks. The UN Food system summit in 2021 started the pathway towards an improved global governance approach for food systems and agriculture, which should be built on in the future. As agriculture and food is linked with diverging interests and sensibilities while especially the vulnerabilities (e.g. on food security and climate risks are concentrated in the Global South), a trustful partnership with countries of the Global South is of utmost importance, especially African countries.

The G7 should improve global governance by:

- Opening an international debate about appropriate ways to continue strengthening global governance of agriculture and food systems.
- Cooperating regularly across various G7 strings (agriculture, development, security, finance) and with existing relevant bodies like at FAO, CFS, WFP, CGIAR, WTO, World Bank and IMF, for instance through a joint task force. Feasible ways of enhancing cooperation should be identified without fundamentally challenging existing bodies and (partial) responsibilities.
- Inviting G20 and other countries early on to join the reflections in an honest partnership spirit and to support a continuous cooperation interlinking different policy frames and summits.
- Opening their markets for African food producers and concluding a strategic investment partnership agreement in agriculture (but not exclusively) to foster investment into competitive and productive cash crop in Africa.

Implementation

The G7 members are key players for collective actions on food security in general and trade-related supply chain issues in that context encompassing a large part of global agricultural trade.

Building on commitments made in previous G7 Presidencies, in 2021, the G7 Trade Ministers committed to developing trade policy approaches in support of sustainable supply chains for forest and agricultural commodities through the WTO, the Forest, Agriculture and Commodity Trade (FACT) dialogue and the work of the International Tropical Timber Organization. In 2021, the G7 also launched the G7 Sustainable Supply Chain Initiative, i.e. the commitment of 22 leading food and agriculture companies headquartered in G7 countries to take action to improve their environmental and social impact of their supply chains and business operations. In 2021, the G7 leaders' Nature Compact recognised they need to do more to safeguard forests and identified due diligence requirements as a tool to ensure supply chains do not fuel deforestation. In 2019 the Business for Inclusive Growth alliance was launched under French Presidency.

Looking ahead, the G7 can play an important role in promoting a more comprehensive and coherent understanding of resilience towards different types of shocks (Sanez 2015). This is key to address the multiple risks the world is facing and equip for future shocks which are expected to be increasingly relevant (Smaller 2022). Such an approach would build on previous G7/G8 Summits already strengthening resilience and sustainability. In 2009, the G8 Summit in Aquila defined the „L'Aquila Food Security Initiative (FSI)“ jointly with countries from the global south and supported open markets for food availability (G8 2009). Moreover, the German G7 in 2015 specified a commitment for rules for responsible supply chains and for food security (G7 2015).

Endnotes

¹ Reuters (2022): Brazil farmers brace for potential fertilizer pinch due to Ukraine crisis, <https://www.reuters.com/article/ukraine-crisis-fertilizers-brazil-idUSKBN2KT34E>

² ILO, „Child labour in agriculture“: <https://www.ilo.org/ipecc/areas/Agriculture/lang--en/index.htm>, accessed 16.3.2022

³ G20 Argentina 2018, G20 Inclusive Business Framework and Call to Action on Inclusive Business: <https://www.inclusivebusiness.net/IB-Universe/G20/G20-and-IB>

⁴ “G7 agriculture ministers: Only open markets will provide food security for everyone”, German Federal Ministry of Food and Agriculture: <https://www.bmel.de/SharedDocs/Pressemitteilungen/EN/2022/g7-extraordinary-meeting.html?nn=42908>

⁵ ECOWAS Commission. The West Africa Regional Food Security Reserve (RFSR) at Special Session of the RPCA, 29-30 October 2015, Milan, Italy. <https://www.oecd.org/swac-expo-milano/presentationsanddocuments/rpca-agir-alain-sy-traore-cedeao.pdf>

⁶ International Monetary Fund (IMF), „IMF lending“: <https://www.imf.org/en/About/Factsheets/IMF-Lending>, accessed 16.3.2022

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Dr. Stormy-Annika Mildner (M.Sc.) became Director of the Aspen Institute Germany in Berlin in January 2021. As an adjunct professor, she teaches political economy at the Hertie School. From 2014 to 2020, she served as head of the department "External Economic Policy" at the Federation of German Industries (BDI), where she was responsible for international trade and investment issues. As Sherpa, she spearheaded the German Business7 Presidency (2015) and the German Business20 Presidency (2016-2017). Prior to joining BDI, she was Member of the Board of the German Institute for International and Security Affairs (SWP), worked as a lecturer at the John F. Kennedy Institute of the Free University of Berlin, and headed the program "Globalization and the World Economy" at the German Council on Foreign Relations (DGAP). She completed research fellowships at the American Institute for Contemporary German Studies and the Transatlantic Academy of the German Marshall Fund in Washington.

Bettina Rudloff, German Institute for International and Security Affairs/ Stiftung Wissenschaft und Politik (SWP)



Bettina Rudloff is an agricultural engineer and holds a PhD in agricultural economics. She started her research work on trade, agriculture and development at the European Institute of Public Administration (EIPA), Maastricht, the Netherlands. During that time, she led mid-term vocational training programs of the EU Commission for developing countries' WTO negotiators. After a subsequent Assistant Professorship at the Institute for Food and Resource Economics/University of Bonn, she became Senior Associate at the German Institute for International and Security Affairs. Here she works on EU trade and investment rules at all levels of regulatory regimes and analyses the scope for tariff and regulatory rules to support sustainability.



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