



## AGRICULTURAL POLICIES IN OECD AND SELECTED NON-OECD ECONOMIES

Martin von Lampe  
OECD Trade and Agriculture Directorate

Civil Dialogue Group  
“International Aspects of Agriculture Policy”  
Brussels – 5th May 2015



### Content

---

1. The OECD: a forum to share experience and seek solutions
2. Agricultural support levels: declining OECD trend, but remaining based on significant market interventions
3. Medium-term Outlook: Demand in Emerging and Developing Economies continues to support prices

# 1. The OECD

## 2. Agricultural Policies

## 3. Medium-term Outlook

## 4. Conclusions

OECD Trade and Agriculture Directorate

3



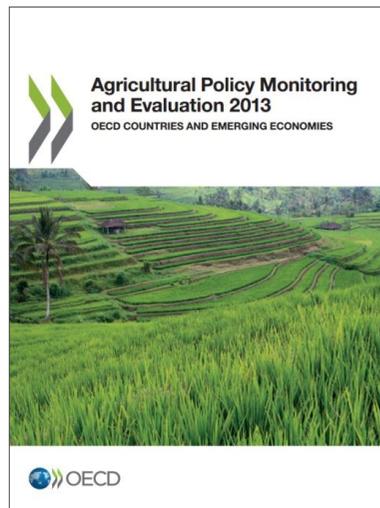
- was established in 1961, originating in the Marshall Plan
- promotes policies to improve the economic and social well-being of people around the world.
- provides a forum for governments to share experiences and seek solutions to common problems.
- analyses, measures and compares experiences and recommends policies which can help raise living standards globally
- takes a multidisciplinary, collaborative approach
- today has 34 Members, 6 key partners, global reach: a total of >100 countries participate in some 300 expert committees and working groups
- is part of a global community of IOs and initiatives

1. The OECD
- 2. Agricultural Policies**
3. Medium-term Outlook
4. Conclusions

OECD Trade and Agriculture Directorate

5

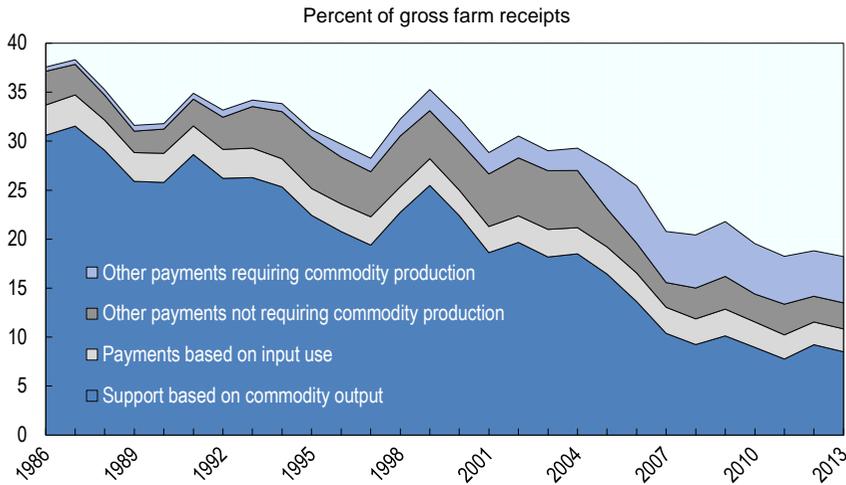
 OECD Agricultural Policy Monitoring and Evaluation



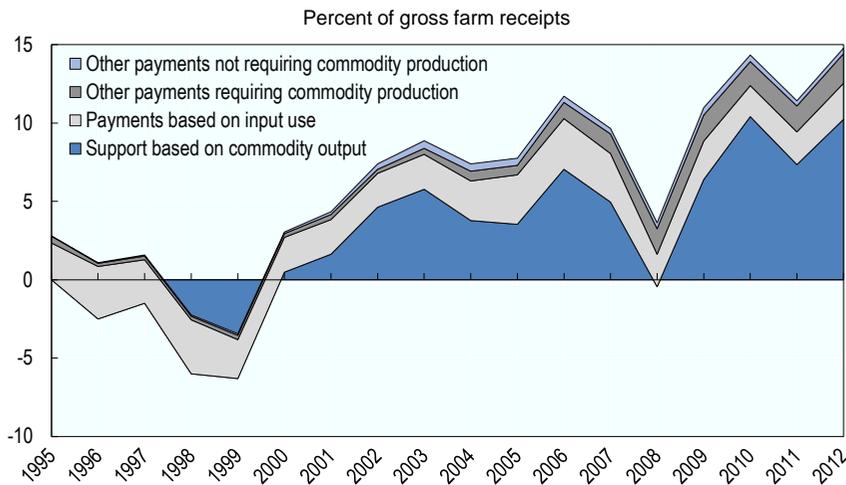
6



Composition and level of support 1986-2013, OECD total

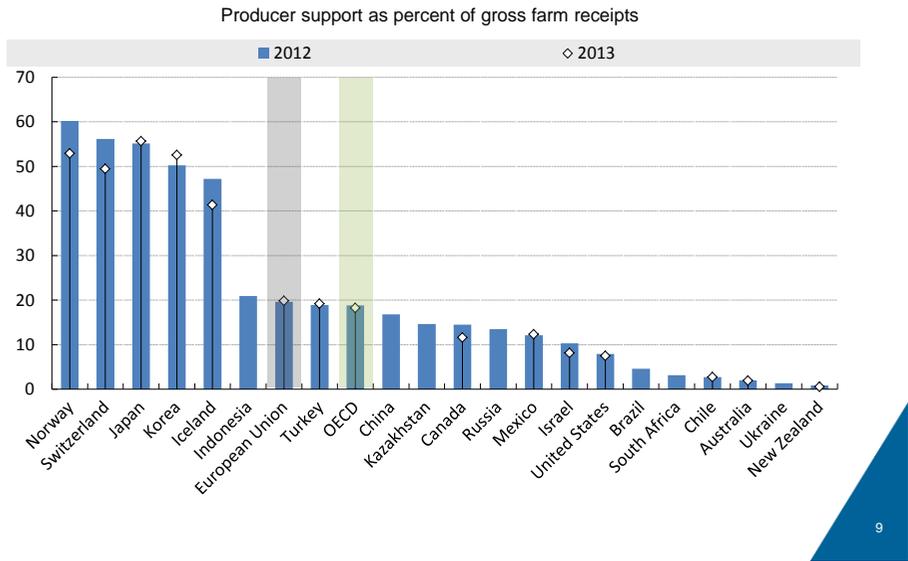


Composition and level of support 1995-2012, 7 Emerging Economies

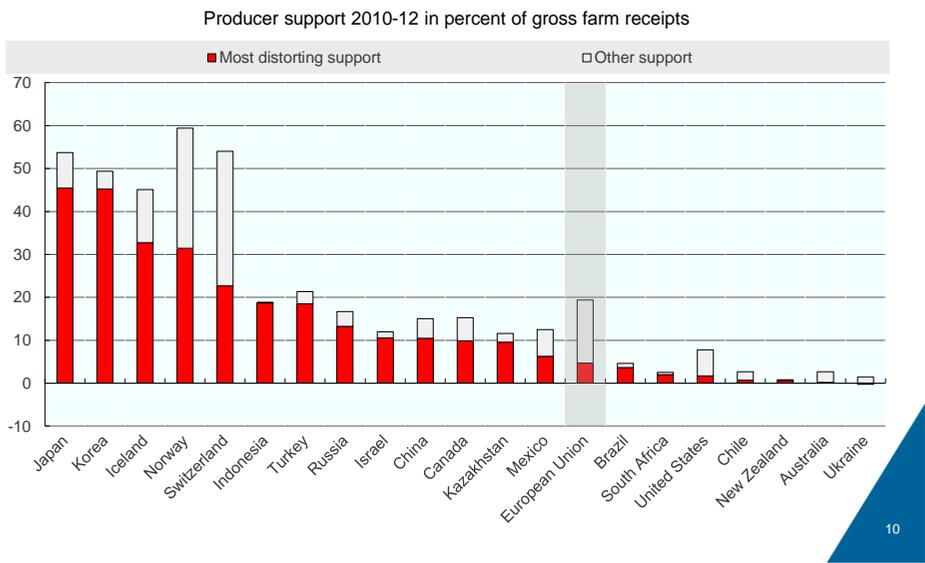




## Support to agriculture varies across countries

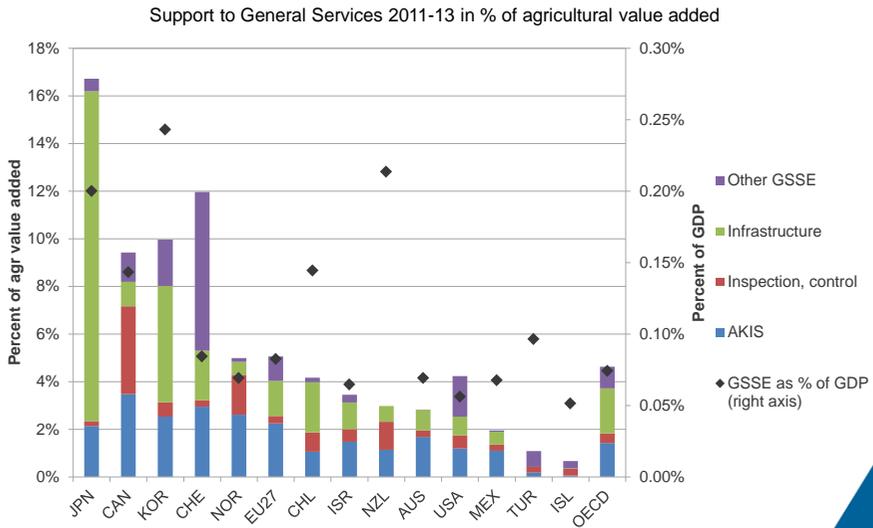


## Most distorting forms of support remain prevalent

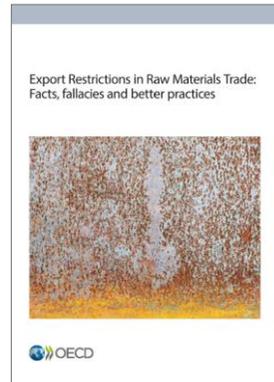
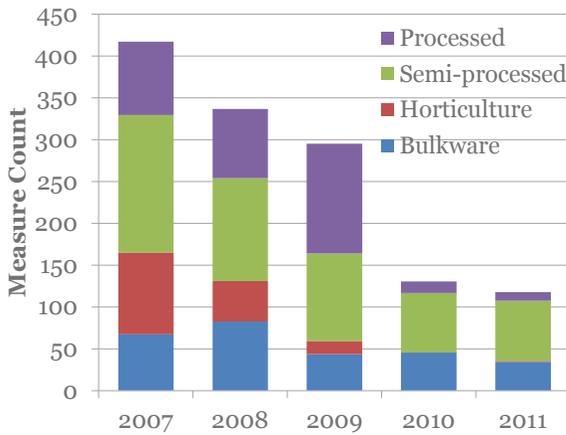




## Efforts on the “enabling environment” vary in size and focus across countries



## Export restricting measures in agriculture, 2007-2011

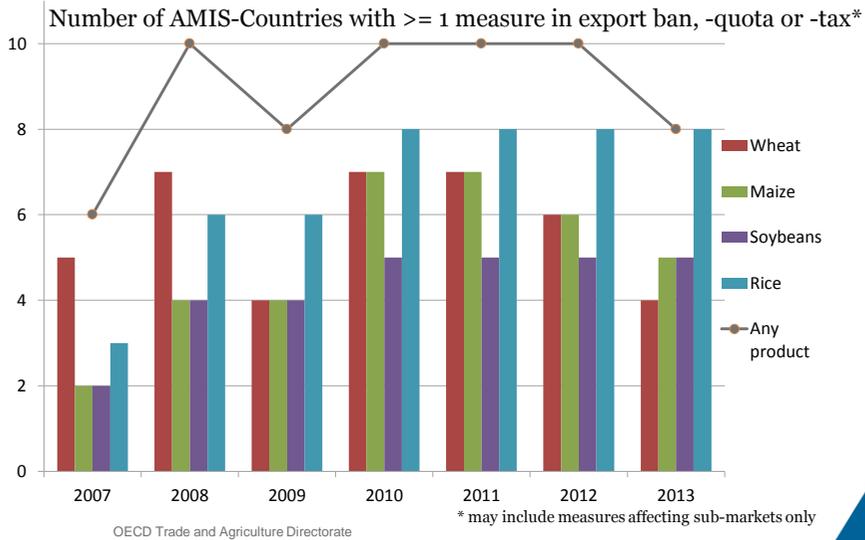


OECD Trade and Agriculture Directorate





## Export restricting measures continue to be applied by many countries



13

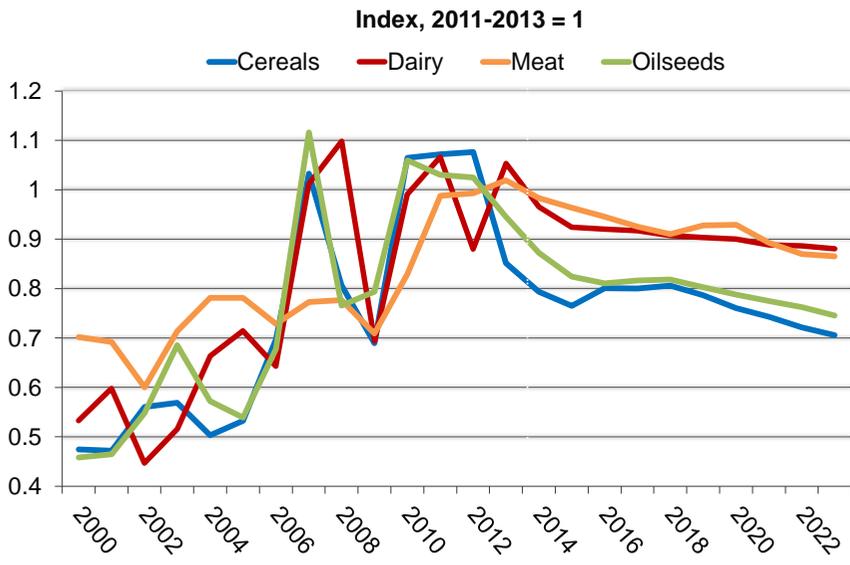
1. The OECD
2. Agricultural Policies
- 3. Medium-term Outlook**
4. Conclusions

14

## OECD-FAO Agricultural Outlook



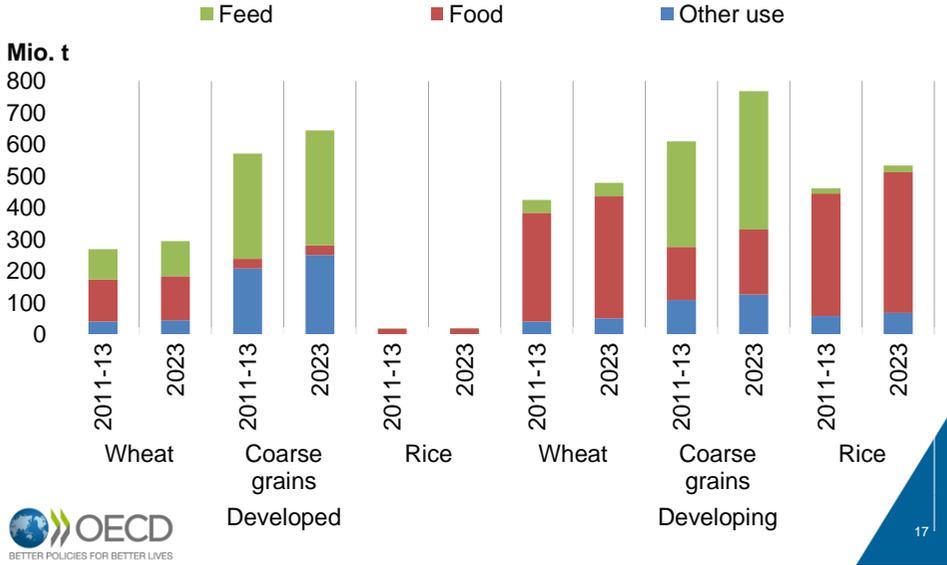
## Moderate decline in real prices expected



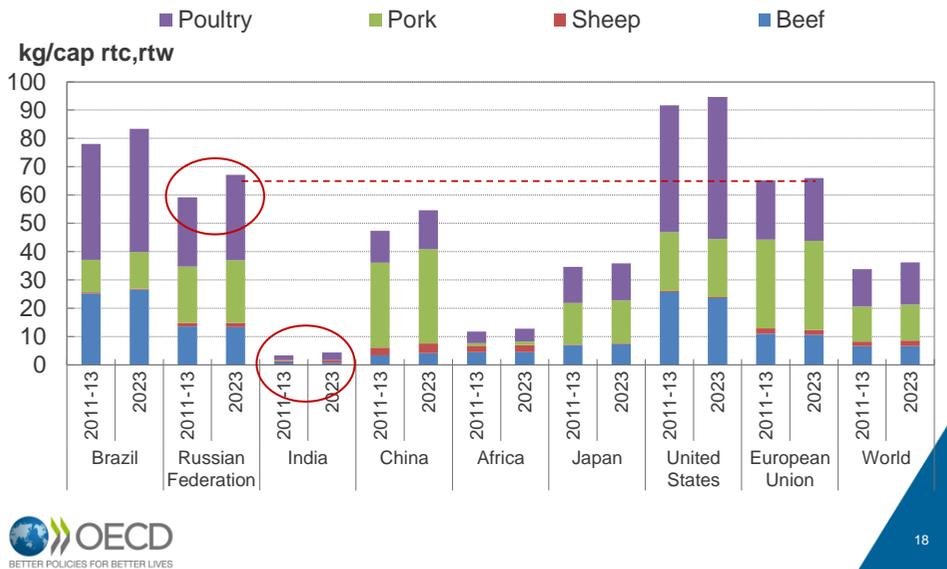


## Growing diversity of crop use

Cereal consumption in developed and developing countries



## Per capita meat consumed in the world 2023 vs. base period 2011-13



# 1. The OECD

## 2. Agricultural Policies

### 3. Medium-term Outlook

## 4. Conclusions

OECD Trade and Agriculture Directorate

19

### Agricultural policies in most countries need further reforms

---

#### **Too little is done towards an “enabling environment”...**

- *Invest in strategic public goods* with long-term benefits: innovation, productivity, sustainability, risk management

#### **... while markets remain strongly distorted**

- *Shift away from price- and output-linked policies* that distort market signals and transfer the burden of adjusting to markets to other countries
- *Remove border policies* that isolate domestic markets and contribute to international price volatility

#### **Policies often “offset” each other**

- *Improve coherence* between macroeconomic, trade, investment, agriculture, and rural policies

#### **Countries’ priorities differ, but are rarely unique**

- Address national policy priorities (such as food security) with *well targeted policy packages*, informed by a diversity of available policy experiences

20



## More than just policies

---

- » Agricultural producers and food industry are key drivers of productivity and sustainability
- » Increasing integration along the food chain for diversified supply of quality food
  - » But shorter supply chains for food supply for target consumer groups
- » On-farm and market-based risk management
- » Education of farmers key for demand-driven food markets

21



## For more information:

---

Agricultural Monitoring and Evaluation 2014

<http://www.oecd.org/tad/agricultural-policies/monitoring-and-evaluation.htm>



OECD-FAO *Agricultural Outlook*  
[www.agri-outlook.org](http://www.agri-outlook.org)

OECD Long-Term Scenarios  
for Food and Agriculture

<http://www.oecd.org/tad/agricultural-trade/long-term-scenarios.htm>



OECD Food, Agriculture and Fisheries Papers

[http://www.oecd-ilibrary.org/agriculture-and-food/oecd-food-agriculture-and-fisheries-working-papers\\_18156797](http://www.oecd-ilibrary.org/agriculture-and-food/oecd-food-agriculture-and-fisheries-working-papers_18156797)

Find and contact us:

[www.oecd.org/tad](http://www.oecd.org/tad)

[www.twitter.com/OECDagriculture](https://www.twitter.com/OECDagriculture)

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

22