

GLOBAL FOOD SECURITY AND TRADE SHIFTS

POLICY BRIEF
APRIL 2026



ABOUT THIS POLICY BRIEF

This policy brief has been developed as an outcome of the World Agriculture Forum (WAF) Policy Dialogue on “Global Food Security and Trade Shifts” convened on 27 January 2026.

The dialogue brought together policymakers, researchers, private sector leaders, and development practitioners to examine the rapidly evolving dynamics shaping global food systems. Discussions focused on the intersection of geopolitical tensions, sustainability regulations, and trade policy shifts, and their implications for food security, agricultural productivity, and market stability.

Drawing on the insights and evidence shared during the dialogue; this brief synthesizes key perspectives and identifies emerging policy priorities for navigating a more complex global food trade environment. It highlights the growing importance of coordinated trade governance, inclusive sustainability compliance systems, regional market integration, and strategic investments in agricultural productivity and resilience.

The brief aims to contribute to ongoing global discussions on food security and agricultural transformation by providing policymakers and stakeholders with a concise analysis of the risks, opportunities, and policy pathways emerging from current shifts in global food trade and governance.

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Carmine Paolo De Salvo, Lead Rural Development Specialist, Inter-American Development Bank

Florence Kaibi, Agricultural Attaché, Embassy of Kenya to the European Union

Dennis O. Carter, Group Chief Executive Officer, Maxigate Group

Mandar Godge, Chief Executive Officer of Grain International and Country Director (Singapore), World Agriculture Forum.

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The synthesis and analysis presented in this brief reflect the outcomes of the dialogue and are issued by the World Agriculture Forum. The views expressed do not necessarily represent the individual positions of the acknowledged contributors or their affiliated institutions.

EXECUTIVE SUMMARY

Global food systems are entering a period of profound transition. Geopolitical fragmentation, climate volatility, slowing productivity growth, and the rapid rise of sustainability-driven trade regulations are reshaping how food is produced, traded, and governed. At the same time, global food insecurity remains persistently high, raising concerns about the long-term resilience of the global food system.

Against this backdrop, the World Agriculture Forum convened a policy dialogue on “Global Food Security and Trade Shifts: Navigating Fragmentation, Sustainability Standards, and the Path to Intelligent Interdependence.” The discussion brought together policymakers, experts, and industry leaders to examine how evolving trade dynamics and regulatory frameworks are redefining the relationship between food security, sustainability, and global markets.

Three structural shifts are shaping the emerging landscape.

First, global agricultural trade is entering a phase of fragmentation. After decades of liberalization, recent years have seen rising tariffs and expanding non-tariff barriers. While often driven by domestic political and food security concerns, these measures risk increasing volatility in global food markets and weakening the stabilizing role of predictable trade systems.

Second, sustainability standards are becoming structural conditions for market access. Policies such as the European Union’s deforestation regulation signal a shift from voluntary commitments to mandatory compliance regimes. While these frameworks can improve environmental outcomes across supply chains, they may also exclude smallholder producers from high-value markets without adequate technical and financial support.

Third, agricultural productivity growth is slowing. Global Total Factor Productivity growth has decelerated since the mid-2010s, while investment in key public goods including research, rural infrastructure, and extension services has declined relative to the value of agricultural production. This trend threatens the long-term capacity of food systems to deliver both productivity and sustainability.

Despite these pressures, important opportunities are emerging. Regional trade integration initiatives, including the African Continental Free Trade Area, offer pathways to diversify markets and strengthen regional supply chains. At the same time, investments in national traceability and certification systems can transform sustainability compliance from a barrier into a source of competitiveness.

The central message is clear: food security in the twenty-first century cannot be achieved through isolation alone. It requires “intelligent interdependence” which is a strategic balance between strong domestic food systems, regional integration, and resilient global trade relationships.

Achieving this balance will require renewed investment in agricultural public goods, inclusive compliance systems that support smallholders, stronger regulatory cooperation, and deeper collaboration between governments, research institutions, and the private sector. In an increasingly uncertain global environment, resilient food systems will depend on how effectively policies, markets, and institutions work together to manage interdependence and ensure equitable participation in global value chains.

WHY TRADE DYNAMICS MATTER FOR FOOD SECURITY TODAY

The interplay between geopolitical tensions, climate shocks, and trade disruptions are reshaping how food is produced, traded, and governed. The traditional logic of comparative advantage where countries specialize and rely on open global exchange to ensure efficiency and stability is increasingly under strain. In its place, a new landscape is emerging, marked by export restrictions, import tariffs, and non-tariff barriers, traceability requirements that add complexity to market access, strategic stockpiling, and renewed pushes for domestic food self-reliance.¹

Recent crises have exposed the fragility of global food interdependence. The combined effects of the COVID-19 pandemic, the Russia–Ukraine war, and climate-induced crop failures have created a “polycrisis” in global food systems where shocks cascade across borders, amplifying price volatility and eroding trust in international markets. Food trade, once seen primarily as a stabilizing force, now remains both a risk and a remedy.

Export restrictions and trade policy interventions have become central determinants of global food price volatility and availability. Farm policies and trade restrictions increasingly shape global market outcomes. While export bans and quotas are often enacted to shield domestic consumers from price spikes, evidence shows that such measures tend to amplify global shortages, accelerate price surges, and disproportionately harm net food-importing and low-income countries. In parallel, export subsidies and differential tariff regimes are distorting competition and redirecting food flows away from traditional market. Policy contagion where one country’s restriction triggers retaliatory measures elsewhere further undermine supply predictability, reinforcing the importance of transparency and cooperative multilateral mechanisms during crises.

Beyond formal tariffs and quotas, non-tariff measures and evolving regulatory requirements, particularly in high-income markets such as the European Union, are increasingly shaping trade flows. Sustainability and traceability standards, for instance, those linked to deforestation-free production or carbon accounting while essential for environmental accountability, can impose heavy compliance burdens on small and medium exporters in developing countries. These barriers risk marginalizing producers without the resources to navigate complex certification systems, thereby introducing new dimensions of inequity and exclusion within global food trade.

Strategic grain reserves have re-emerged as a prominent policy tool in this context. When governed transparently and deployed cooperatively, reserves can buffer short-term supply disruptions and help stabilize prices. However, prolonged hoarding or opaque stockpiling by major exporters can distort markets, tighten global availability, and destabilize trade equilibrium underscoring the need for collective governance mechanisms to manage global grain stocks.

At the same time, global and regional trade systems are being reconfigured. The fragmentation of trade into regional blocs is accelerating, with frameworks such as the African Union’s Agenda 2063 and ASEAN’s Food Security Framework seeking to strengthen regional food corridors and coordination. While regional integration can enhance resilience, poorly aligned trade policies and retaliatory measures risk deepening dependency and vulnerability among food-importing countries.

Emerging evidence shows that resilient food systems are built neither through isolation nor through unfettered openness, but through strategic diversification of trade networks. Global trade supports not only the flow of staple commodities but also access to diverse and nutritious foods helping stabilize prices and reduce malnutrition risks. In this sense, well-governed trade systems and food self-reliance are not opposing objectives, but complementary pillars of resilience.²

The challenge facing policymakers today is therefore not whether to engage in global trade, but how to manage interdependence strategically. Navigating the new landscape of food security will require balancing national resilience with international cooperation, aligning domestic policy priorities with regional integration and transparent global trade governance.

It is within this context that the World Agriculture Forum convened the dialogue “Global Food Security and Trade Shifts,” examining how governments, industry, and international institutions can navigate the evolving balance between sovereignty and interdependence, crisis response and long-term resilience.

¹World Trade Organization. Committee on Agriculture Review. Geneva: WTO, 2025.

²International Food Policy Research Institute. Trade, Food Security, and Nutrition: Evidence from Global and Regional Analyses. Washington, DC: IFPRI, 2025.

THE STATE OF GLOBAL FOOD SYSTEMS: KEY INDICATORS

673 million people faced hunger in 2024

\$700–800 billion

Annual global policy support to agriculture, through subsidies, market interventions, and public spending.

~30% → ~15%

Agricultural support as a share of production value reduced since the early 2000s.

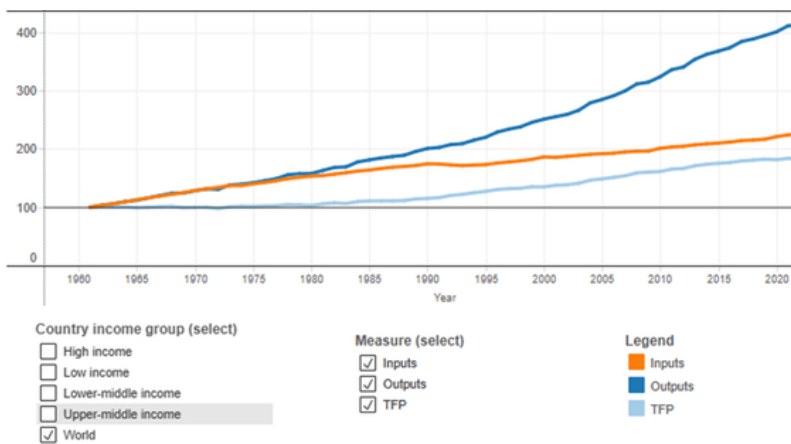
2025

saw a sharp rise in tariffs, reversing three decades of trade liberalisation
Signalling growing fragmentation in global agricultural markets

55%

of Kenya's coffee exports go to the EU
Illustrating dependence on regulated, sustainability-driven markets

AGRICULTURAL PRODUCTIVITY GROWTH SLOWED AFTER 2015



Global agricultural productivity (TFP) growth has decelerated since the mid-2010s, raising concerns about the sector's ability to sustainably meet future food demand.

Figure 1: Source: TFP Index. USDA 2025

KEY CHALLENGES AND OPPORTUNITIES

Global Agriculture and food systems are facing an immense pressure, yet these same dynamics are also creating opportunities for transformation.

One of the most pressing concerns is the persistence of global food insecurity, which remains above pre-2014 levels, with Africa particularly affected. This reflects not only supply-side constraints but also deeper structural vulnerabilities in access, affordability, and distribution. At the same time, it underscores the importance of strengthening regional food systems. Initiatives such as the African Continental Free Trade Area (AfCFTA), with its potential to connect a market of 1.4 billion people, point to the possibility of more integrated and resilient intra-regional trade.

At the global level, trade fragmentation is becoming more pronounced. The sharp rise in tariffs in 2025 marks a clear departure from decades of gradual liberalisation, contributing to uncertainty in agricultural markets. Yet this shift also highlights the growing importance of regulatory coordination. The postponement of the European Union's deforestation regulation (EUDR) to December 2026 illustrates how regulatory diplomacy can help balance environmental objectives with the practical realities faced by exporting countries.

Sustainability and traceability standards are increasingly shaping access to high-value markets. While such frameworks are essential for environmental accountability, they often introduce significant compliance challenges, particularly for smallholder producers. However, emerging experiences suggest that these barriers are not invincible. Kenya's use of geospatial traceability systems demonstrates how compliance can be made more inclusive, while evidence from the Nairobi Coffee Exchange where certified coffees have earned price premiums of around 6%, indicates that sustainability can also generate tangible economic returns.

At the same time, agricultural productivity growth is slowing, with Total Factor Productivity (TFP) growth decelerating significantly since around 2015. This trend is particularly concerning given the parallel decline in investment in agricultural public goods, including research, infrastructure, and extension services. Together, these factors risk constraining the sector's ability to respond to rising demand and increasing climate stress. Yet there is also evidence that well-designed interventions such as targeted or "smart" subsidies can improve farm-level efficiency and help sustain productivity gains.

With these set of challenges and opportunities taken together, they suggest that the problem is not only of constraint, but of alignment too. The opportunities that are emerging through regional integration, regulatory adaptation, and technological innovation will greatly depend on how effectively policies, investments, and institutions are brought together to support more resilient and inclusive agriculture and food systems.

FIVE STRUCTURAL TRANSFORMATIONS SHAPING FOOD SECURITY AND TRADE

Global food systems are being reshaped by a set of interconnected structural transformations. These shifts are redefining how food is produced, traded, and governed, with significant implications for resilience, market access, and equity. The following five dynamics capture the most critical pressures shaping this transition.

1. A SYSTEM UNDER STRESS

Global food systems are facing a convergence of pressures that together mark a structural turning point. Recent shocks which include the COVID-19 pandemic and the Russia-Ukraine war exposed the fragility of globally integrated supply chains. In response, many governments adopted defensive measures such as export restrictions, emergency tariffs, and domestic price controls. While these actions were intended to protect national consumers, they have often contributed to greater market uncertainty and price volatility eroding the very stability they sought to protect.

The scale of the challenge remains starkly apparent. Around 673 million people faced hunger in 2024, which is 8.3 percent of the global population¹, highlighting the continuing insecurity faced by the world's food systems. Global food insecurity is still elevated than it was ten years ago, and structural vulnerabilities in production, markets, and governance are making it worse in many parts of Africa.²

At the same time, agricultural growth is expected to continue but at a slower pace. Long-term population projections and therefore food demand growth have been revised downward compared with earlier expectations. Yet, on the supply side, agriculture faces mounting pressures from climate change, land degradation, water scarcity, and increasingly frequent extreme weather events. These factors are likely to constrain productivity gains and increase the complexity of food system management.

Together, these trends point to a global food system that will continue to expand but under tighter environmental, economic, and policy constraints

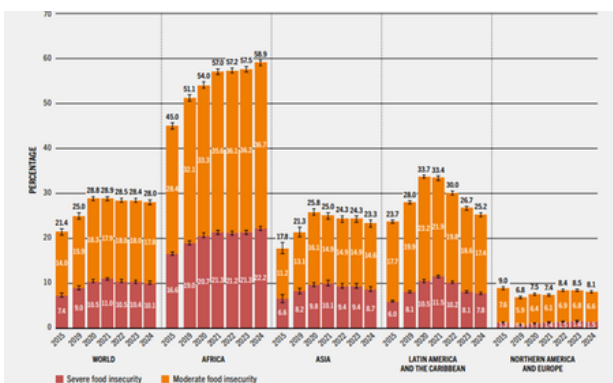


Figure 2: Global food insecurity trends (2014–2025). Source: IDB/OECD.

2. THE POLICY LANDSCAPE

The global policy environment surrounding agricultural trade is also undergoing a significant shift. For nearly three decades following the mid-1990s, agricultural trade was characterized by gradual liberalisation. OECD economies progressively reduced agricultural support to farmers, while several emerging economies moved toward greater integration with global markets.

Recent developments suggest that this trajectory may be changing. In 2025, global agricultural tariffs rose sharply, marking a break from the long-term trend toward liberalisation.³ At the same time, non-tariff barriers and trade-distorting measures have expanded across many regions, increasing costs and complexity across agricultural value chains.

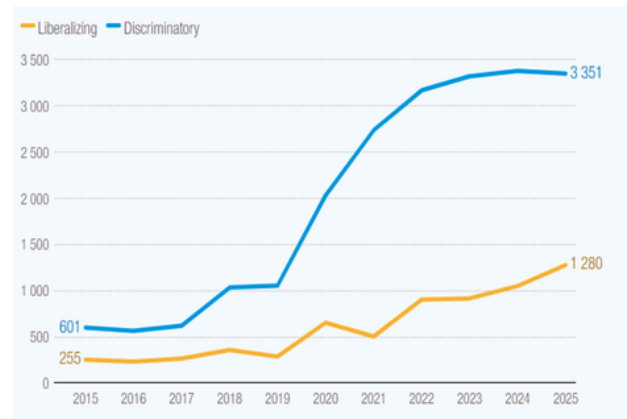


Figure 3: Trade-restricting and trade-distorting measures continue to rise. UNCTAD 2026

Despite these changes, overall public support to agriculture remains substantial. Global policy support has stabilised at roughly USD 700–800 billion annually since 2020. However, support as a share of the value of agricultural production has declined significantly over the past two decades, falling from around 30% in the early 2000s to approximately 15% today.

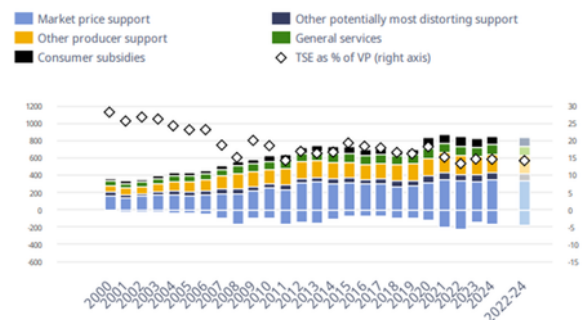


Figure 4: Support is at a new plateau since 2020, but lower as share of value of production. OECD 2025

¹The State of Food Security and Nutrition in the World 2025

²FAO (2024). *The State of Food Security and Nutrition in the World*. Rome: FAO

³OECD (2024). *Agricultural Policy Monitoring and Evaluation 2024*. Paris: OECD Publishing.

Another concerning trend is the steady decline in investment in agricultural public goods. Spending on research and innovation, irrigation, biosecurity, rural infrastructure, and electrification has fallen as a share of agricultural production value over the past 25 years. These investments are critical for sustaining long-term productivity growth and improving resilience to climate and market shocks.

(Refer Figure 1)

This decline is reflected in broader productivity trends. Global agricultural Total Factor Productivity (TFP) grew rapidly from the 1960s through the early 2010s but has slowed since around 2015. Without renewed investment, future output growth may rely increasingly on land expansion and higher input use, placing additional pressure on natural resources.⁴

Looking ahead, most projected agricultural growth is expected to come from yield improvements rather than expansion of cultivated land. While this shift reflects the limits of land and natural resources, it also highlights the growing importance of sustained investment in agricultural innovation, research, and climate adaptation. Without renewed commitment to these public goods, achieving yield-driven growth will become increasingly difficult under conditions of rising climate volatility and environmental stress.

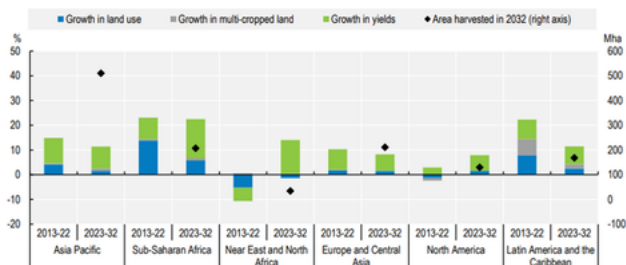


Figure 5: Most of future growth is expected to come from yield increases. OECD FAO 2025

3. SUSTAINABILITY STANDARDS AS STRUCTURAL MARKET CONDITIONS

In parallel with these policy shifts, the nature of trade barriers is changing. Traditional tariffs are increasingly being replaced by regulatory and compliance-based requirements that determine access to global markets.

Today, market participation depends not only on price competitiveness but also on the ability to demonstrate sustainability, traceability, and due diligence across supply chains.

Policies such as the European Union's [Farm to Fork Strategy](#), the [EU Deforestation Regulation \(EUDR\)](#), and the [Corporate Sustainability Due Diligence Directive](#) signal a broader shift from voluntary sustainability commitments toward mandatory regulatory compliance, making sustainability a formal condition of trade rather than a market preference.

These frameworks aim to improve environmental accountability across global supply chains. However, they also create new challenges for producers in developing countries. For African agricultural exporters especially, the consequences are direct and significant. Many smallholder-dominated value chains lack the technical, financial, and institutional capacity to comply, risking exclusion from high-value markets. Kenya's experience with French bean exports illustrates this vividly: a sharp export decline in 2024 resulted not from loss of productive capacity, but from an inability to meet tightening pesticide residue requirements.

Kenya's Coffee Sector: Compliance as Competitive Advantage

The EU accounts for approximately 55% of Kenya's coffee exports – a sector supporting nearly 800,000 small-scale farmers. In response to the EUDR, the Kenyan government led a national geospatial mapping initiative in partnership with industry and development partners. By late 2025, more than 500,000 farmers across 33 coffee-producing counties had been geo-mapped. Certified and traceable coffees subsequently achieved average prices approximately 6% above market at the 13th Nairobi Coffee Exchange,⁵ demonstrating that inclusive compliance systems can generate measurable market premiums rather than simply imposing costs.

Regulatory diplomacy has emerged as a crucial tool. Coordinated engagement by African embassies in Brussels, highlighting the development impact of the EUDR on coffee and cocoa value chains which played a significant role in the decision to postpone EUDR implementation to December 2026, providing critical preparation time.

This experience demonstrates that when supported by effective institutions and infrastructure, compliance with sustainability standards can generate tangible economic benefits rather than simply imposing additional costs.

⁴IDB (2025). *Agricultural Productivity and Sustainability in Latin America and the Caribbean: Flagship Report*. Washington, D.C.: IDB.
⁵Nairobi Coffee Exchange (2025). *13th Annual Market Report*. Nairobi, Kenya: NCE.

4. SMALLHOLDER REALITIES

Across Africa, food security challenges are not primarily about production capacity. In Ghana and across much of the continent, agriculture is predominantly household- and family-based. The binding constraints lie downstream: where to sell, at what price, and how to get produce to market reliably. Weak supply chains, limited aggregation mechanisms, and the absence of guaranteed buyers expose farmers to price volatility and post-harvest losses. Poor roads, high logistics costs, and dependence on intermediaries compound these challenges.

Macroeconomic pressures have intensified these dynamics. High inflation has reduced purchasing power while increasing production costs, eroding farmer confidence and contributing to grain shortages that forced Ghana to rely on ECOWAS regional imports. The lesson is direct: food insecurity is as much a function of market certainty and policy coherence as it is of production capacity.

Effective policy responses share common features: assured procurement markets (such as Ghana's Feed Ghana programme), input subsidies that lower production costs, systematic farmer registration and cooperative models that enable aggregation and government planning, and irrigation investment to reduce rainfall dependency. Land tenure security and resolution of land disputes are equally foundational, without them, farmers are reluctant to invest in land preparation or productivity-enhancing practices.

5. AfCFTA AND INTRA-AFRICAN TRADE

Regional trade integration represents one of the most promising avenues for strengthening food system's resilience across the continent. The [African Continental Free Trade Area \(AfCFTA\)](#)⁶ creates the framework for a single market of 1.4 billion people, offering significant potential to expand intra-African trade in agricultural products.

Currently, many African countries produce same export commodities like coffee in Kenya and Ethiopia, cocoa in Ghana, and other primary goods that are primarily destined for external markets. As a result, regional trade remains under-developed despite the geographic proximity of supply and demand.

AfCFTA provides an opportunity to rebalance this pattern by strengthening regional value chains and encouraging greater trade among African countries.

Expanding intra-regional markets can help stabilise supply, reduce dependency on distant markets, and enable producers to capture greater value within the continent. Importantly, this shift does not imply disengagement from global trade. Instead, it reflects a strategy of diversification. Kenya illustrates this approach: African markets have become the country's largest export destination, with the European Union as the second largest, which is a complementary, not competitive, relationship.

Realising the full potential of AfCFTA will require more than tariff reductions. Efficient cross-border logistics, access to finance for private sector actors, and coordinated policy implementation across countries will all be essential. Without addressing these structural constraints, the promise of regional integration may remain largely unrealised.

Intelligent Interdependence

Food security is no longer a choice between self-sufficiency and open trade, it is about managing interdependence strategically.

"Intelligent interdependence" offers a more effective framing: countries actively shape their exposure to global markets by diversifying trade partners, strengthening regional integration, and investing in resilient domestic systems. Rather than withdrawing from trade or remaining passively dependent on it, governments can build the capacity to engage on more stable and equitable terms. In this context, food sovereignty is not about isolation. It is about institutional strength which means the ability to participate in global markets with resilience, flexibility, and bargaining power.

⁶African Union Commission (2019). *African Continental Free Trade Area (AfCFTA) Agreement*. Addis Ababa: African Union.

Governments and Policymakers

Governments face the challenge of balancing domestic food security priorities with the benefits of open and predictable trade systems. Short-term defensive policies such as export restrictions may provide temporary relief but can amplify volatility in global markets. Policymakers should therefore prioritize transparent trade policies, strengthen domestic resilience through investment in productivity and infrastructure, and actively engage in regional and global trade cooperation frameworks.

National governments also play a critical role in building enabling systems for compliance with emerging sustainability standards. Investments in national traceability systems, farmer registries, and digital monitoring infrastructure can help ensure that environmental regulations enhance competitiveness rather than exclude smallholder producers from international markets.

Multilateral Institutions and Development Partners

International organizations and development finance institutions have an essential role in safeguarding the stability and inclusiveness of global food trade. Strengthening rules-based trade governance, improving transparency around export restrictions and food stocks, and facilitating dialogue between exporting and importing countries will be critical in preventing policy contagion during crises.

Development finance institutions and multilateral agencies should prioritize investments that enable developing countries to adapt to new regulatory environments. This includes supporting climate-resilient agricultural research, traceability infrastructure, certification systems, and farmer capacity building. Such investments are particularly important to ensure that sustainability transitions do not deepen global inequalities in agricultural trade.

Private Sector and Agri-Food Value Chain Actors

Private sector actors—including agribusinesses, traders, processors, and financial institutions—play a central role in shaping how sustainability standards and market dynamics translate into practice. As traceability and due diligence requirements expand, companies will increasingly need to invest in transparent and resilient supply chains that integrate smallholder producers rather than bypass them.

The private sector also has a critical role in mobilizing finance and innovation across value chains. Partnerships with governments and development institutions can accelerate the deployment of digital traceability tools, climate-smart production technologies, and market platforms that improve farmer access to reliable buyers and price signals.

Regional and Global Platforms

Regional trade agreements and global dialogue platforms will remain critical for managing shared risks and coordinating responses to shocks. Mechanisms that improve transparency on food stocks, trade policies, and supply disruptions can help stabilize markets and build trust between countries.

In an increasingly interconnected world, resilient food systems will depend on cooperation rather than isolation. Regional integration initiatives and multilateral dialogue platforms can provide the institutional space needed to balance national food security objectives with the benefits of diversified global trade.

Farmers, Cooperatives, and Producer Organizations

At the farm level, the ability to adapt to evolving market and regulatory conditions will depend on access to information, finance, and collective organization. Farmer cooperatives and producer organizations can play a vital role in helping smallholders aggregate production, meet certification requirements, and negotiate better market terms. Strengthening extension systems, digital advisory services, and farmer-led innovation networks will be essential to ensure that smallholders can participate in emerging sustainable supply chains rather than being excluded from them.

POLICY RECOMMENDATIONS

1. Rebalance Food Security Strategies Around “Intelligent Interdependence”

Governments should move beyond binary notions of self-sufficiency versus open markets. Food security strategies must explicitly recognize trade, regional and global, as a core pillar of resilience, enabling countries to manage shocks, stabilize supplies, and smooth price volatility while safeguarding domestic priorities.

2. Strengthen Intra-African Trade While Retaining Strategic Access to Global Markets

Regional trade under the African Continental Free Trade Area (AfCFTA) should be accelerated to absorb staple food volumes, support farmer incomes, and deepen regional value chains. At the same time, continued access to global markets remains essential for high-value commodities, requiring a deliberate dual-market strategy rather than substitution.

3. Invest in Public Goods that Unlock Productivity and Inclusion

Public investment should prioritize infrastructure (rural roads, energy, irrigation), climate-responsive research and development, and farmer-centric extension and training systems. Evidence from multiple regions confirms that productivity gains depend less on the availability of technologies than on farmers' capacity to adopt and use them effectively.

4. Build National and Regional Traceability Systems as Shared Public Infrastructure

Compliance with evolving sustainability and trade standards increasingly depends on data, digital systems, and institutional capacity. Governments should treat traceability and certification systems as public goods –designed inclusively to prevent smallholder exclusion and to ensure that sustainability requirements enhance competitiveness rather than concentrate market power.

5. Align Sustainability Standards with Development Realities Through Regulatory Diplomacy

As sustainability standards become mandatory market conditions, regulatory diplomacy must play a proactive role in securing proportionate timelines, technical support, and capacity-building for developing countries. Effective engagement can ensure that global sustainability objectives are advanced without undermining food security or rural livelihoods.

6. Shift Agricultural Support from Market Distortions to Smart, Targeted Interventions

Policy evidence suggests that market-distorting measures such as price interventions and trade restrictions do not generate long-term productivity gains. Instead, targeted budgetary support, direct transfers, and sustained investment in public goods deliver stronger outcomes for productivity, sustainability, and resilience over time.

7. Reinforce Public–Private Coordination Across the Food System

Governments and the private sector must move from parallel action to coordinated responsibility. Clear role allocation, public investment in enabling conditions and private sector leadership in value chains will be essential to address persistent bottlenecks in market access, logistics, financing, and security.



CONCLUSION

Food security in the twenty-first century cannot be approached through narrow or inward-looking strategies. In an era marked by geopolitical fragmentation, climate volatility, and tightening regulatory regimes, resilience increasingly depends on intelligent interdependence; strong domestic agricultural systems combined with regional integration and sustained engagement in global markets.

At the same time, critical structural pressures are intensifying. Agricultural productivity growth is slowing, policy environments are becoming more restrictive, and sustainability standards are reshaping the conditions of market access. Without deliberate investment in agricultural public goods, inclusive compliance systems, and farmer-centric capacity building, these shifts risk deepening inequalities and locking smallholder producers out of higher-value global supply chains.

Yet the emerging landscape also presents clear opportunities. Strategic intra-regional trade, smarter policy design, regulatory diplomacy, and digital innovation in traceability and supply chains can transform these pressures into opportunities for resilience and shared growth. The challenge is not a lack of solutions or ambitions, it is the lack of coordination; the ability to align policies, institutions, and investments across the agriculture and food systems.



CONTACTS

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