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How the EU's Vision for Agriculture and Food could shape global food security and climate change

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Summary

As hunger and global temperatures rise, food systems sit at the heart of both issues – as the providers of food and as major drivers of climate change. This dual role places them at the centre of two urgent global goals: achieving zero hunger (SDG2) and limiting global warming to 1.5°C – the Paris Agreement's target. To achieve both, at times conflicting, goals, the Food and Agriculture Organization has introduced a climate roadmap aiming to align both objectives.

This brief uses this roadmap as a lens to look at the EU's evolving food policy and its possible impacts for global food security and climate goals. The EU – as the world's largest food trader and a significant agricultural emitter – contributes both positively and negatively to these goals. The newly launched Vision for Agriculture and Food places European food producers at the centre by prioritising farmer income and competitiveness, which is likely to maintain the bloc's contributions to global markets. It takes a step back, however, on ambitions for a broader food system transformation and moves from rules to incentives on climate practices, which raises concerns about achieving the necessary and difficult rapid decarbonisation in the agricultural sector. While other EU sectors continue their transformation, the food system now risks accounting for a growing share of the continent's emissions, inevitably leading to persistent calls for greater action.

Introduction: Food security in a warming world

Since the 1970s, the fight against hunger has made massive gains. Even as the world's population has more than doubled, the proportion of undernourished people has been cut in half. This progress laid the foundation for the adoption of the Sustainable Development Goal 2 (SDG2) in 2015 – an ambitious pledge to end hunger by 2030.

Yet the tide has turned. Since 2015, global hunger has been on the rise once more, fuelled in part by the growing frequency and severity of climate shocks. Food systems are deeply entangled with climate change – not only are they increasingly exposed to its impacts, but they are also significant contributors to global emissions. Without a fundamental transformation in how food is produced, distributed and consumed, the Paris Agreement's goal of keeping warming under 1.5 degrees cannot be achieved.

Recognising this challenge, the Food and Agriculture Organization (FAO) introduced its climate roadmap, designed to bridge the gap between SDG2 and the goal of the Paris Agreement by transforming food systems that also support broader sustainability goals, including biodiversity, land use, and water management. The roadmaps' ambition is to move from a global to a regional view and to develop cost and finance options for transformation at the country level.

Here, we zoom in on the European Union, using the FAO's global roadmap as a reference point to assess the bloc's role in advancing zero hunger and climate action – particularly as its food and farm strategies evolve.

Europe is especially interesting: it is the world's largest food trader, the leading funder of international agricultural research, and a global standard-bearer for climate ambition. But the EU's food policy is entering a period of recalibration. Its once climate-forward Farm to Fork Strategy is being softened, giving way to measures aimed at shoring up farmer incomes and boosting competitiveness. These shifts raise pressing questions about the EU's ability to align its food and climate goals and about the ripple effects for its partners in the Global South, and in particular in Africa, given its hunger and climate challenges.

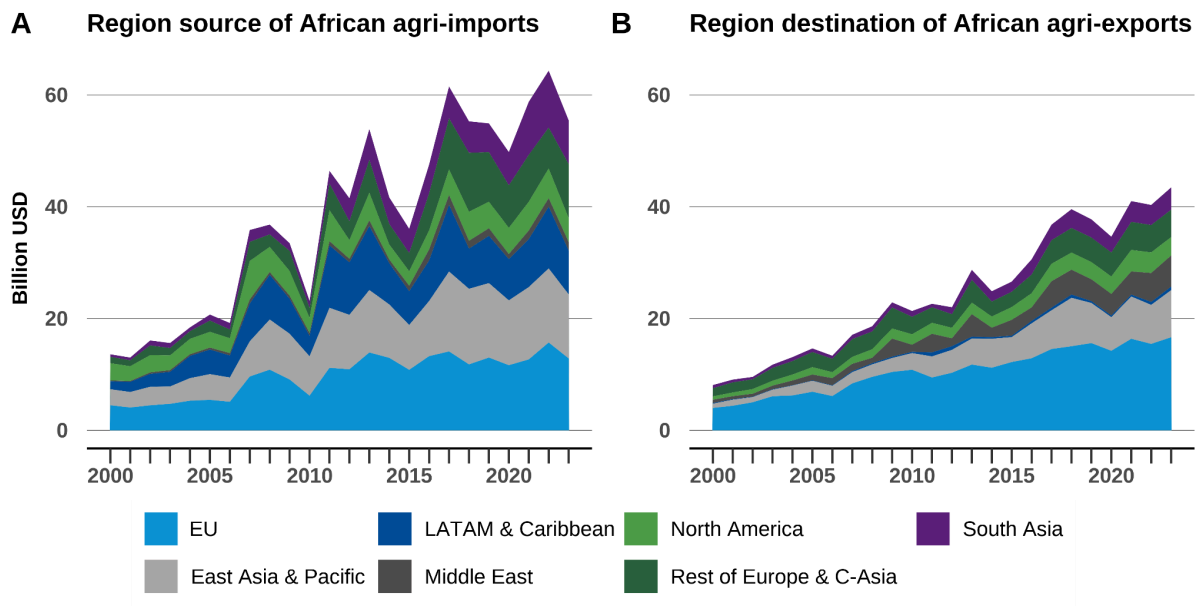
The global food security and climate roles of the EU's food systems

Europe directly supports achieving SDG2 through trade and development cooperation. The EU is largely devoid of energy and mineral wealth, but encompasses some of the most productive farmland in the world. It is the world's largest trader of farm goods - exchanging some €390 billion worth in 2024 - and thus its food policies shape international food prices and food systems beyond its borders. While there are different opinions about the roles of trade for food security, for most countries it is essential, with an expected growing reliance in sub-Saharan Africa - despite increases in cereal production - on food imports.

The EU is the largest development partner on food security. On food security, it channelled billions through emergency aid, research funding and institutional support. Between 2014 and 2021, it provided more than €13 billion to support sustainable food systems abroad, with about €8 billion to the three Rome-based agencies. Yet EU support often reflects Brussels' priorities more than local needs.

The EU is directly important for African food security, the region with the most challenges for achieving SDG2. The EU is the most important region for international sourcing and destination of African agri-food (Fig. 1). These imports from the EU — such as grains and dairy products — are important for African food security as they help stabilise Africa's food supply, diversify diets, and enhance the resilience of African food systems. At the same time, EU imports, facilitated by preferential trade agreements, include high-value coffee, cocoa and fruits. This generates valuable foreign exchange for African economies and links millions of African farmers to a lucrative market.

Figure 1. The EU remains the most important region for international sourcing and destination of African agri-food.



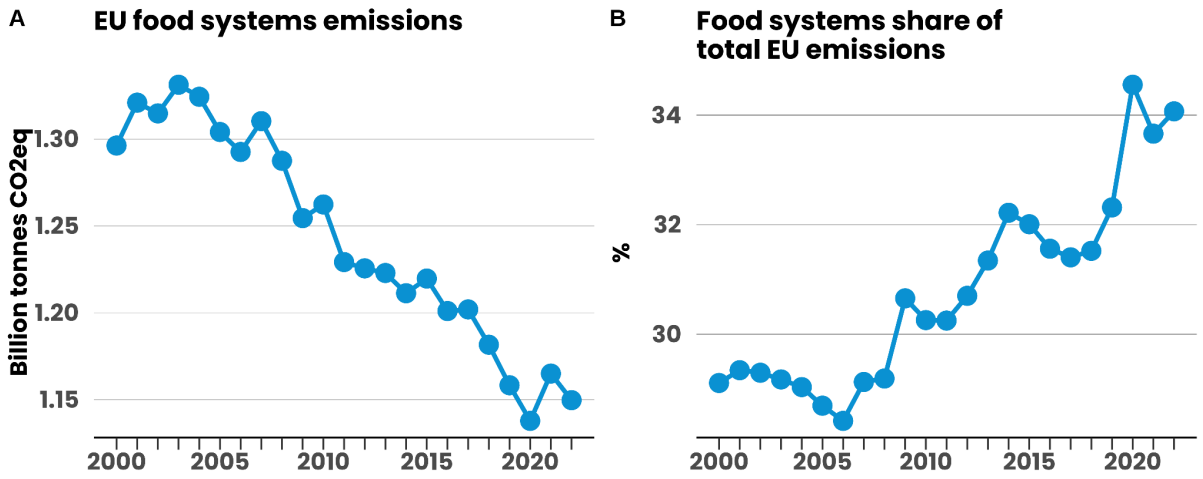
Source: Adapted from FAOSTAT.

The EU's food systems are a major emitter of greenhouse gases, and progress is slow. The EU's food systems emit roughly 1.15 billion tonnes of CO2eq or some 34% of the EU's total emissions (Fig. 2). The EU's farm sector is the only one globally to have reduced its greenhouse gas emissions, but progress has been slow despite large climate spending. As sectors such as energy and industry are decarbonising much faster, the share of food systems in the bloc's overall emissions edged upward. There is progress in the emission intensity of European agricultural production, but this was likely followed by more production overall.

The EU's food system faces the enormous challenge of transforming by 2050 from a large emitter into a net sink – one in which more carbon is sequestered through soils and afforestation than is released across the supply chains. However, land and forests are actually taking up less greenhouse gases than before.

The EU also scores badly on climate adaptation, where the urgency to adapt is underscored by the growing toll of climate change on European agriculture itself. In 2022, the continent endured its worst drought in half a millennium, reducing some crop yields by as much as 16% – at a time when global grain markets were already in disarray.

Figure 2. EU food emissions slowly fall, but their share of EU total rises



Source: Adapted from FAOSTAT and EEA.

The EU has some of the world's most ambitious climate policies and is a leader in both climate mitigation and adaptation. Domestically, it has arguably the most ambitious climate plans of any major country or bloc with its European Green Deal, which sets out climate-neutrality of the continent by 2050. Internationally, the EU serves as a global negotiator and agenda-shaper, acting as a pioneer in climate finance and development partnerships, even though important gaps – such as more loan-funding to affected poorer countries rather than grant giving and underfunding in general – remain.

EU food policy in flux

The EU level has a lot to say on food policy: the bloc massively subsidises its agriculture, is responsible for food safety, standards and trade agreements, and supports science and innovation. Its farm bill, the Common Agricultural Policy (CAP), is one of the largest subsidy schemes in the world. Previously, the bill had quite some distortive effects on international markets, but much has improved since 2013, with few distortive market effects prevailing, although lingering impacts remain. Right now, subsidies are more about helping farmers with their income and protecting the environment than boosting production.

Climate policy increasingly shapes EU food policy. The launch of the European Green Deal in 2019, with its ambition of making the continent climate-neutral by 2050, brought agriculture into the fold through the Farm to Fork Strategy and biodiversity strategies. These initiatives marked the first serious attempt to treat the sustainability of the entire food system – not just farming – as a policy priority. But their ambition has sparked controversy. Critics warn that curbing emissions

and inputs could suppress output and reduce exports, with knock-on effects for global food prices.

Farmer protests, fueled significantly by climate and environmental measures, surged across Europe in 2023-24. Many producers voiced frustration over what they viewed as an uneven playing field, arguing that imports from third countries were subject to less stringent environmental and labour standards, placing EU farmers at a competitive disadvantage. The backlash prompted politicians to court farmers more, with farming interests gaining a stronger foothold in several national governments and in the European Parliament.

In response, the EU softened or delayed several climate-related measures and launched a 'strategic dialogue' on the future of farming. By February 2025, these discussions influenced a new framework aimed at realigning agricultural policy with competitiveness, dubbed the Vision for Agriculture and Food.

The Vision for Agriculture and Food and possible implications

The EU Commissioner for Agriculture Christophe Hansen launched the *Vision for Agriculture and Food*, setting a new course for the EU's food policy for 2040 by placing income boosting for European farmers and their competitiveness central, together with reducing critical imports of oilseeds and protein crops. Rather than a one-size-fits-all, it aims for a territorial approach that allows for more national diversity. Absent are specific quantitative targets - a lesson learned from when the Farm to Fork Strategy's goals became a lightning rod for critique. Assessing impacts then is difficult before the Vision is translated into implementation, and impacts will further depend on how trade partners will react and their interaction with other global and local dynamics. Despite these uncertainties and complexities, the Vision clearly signals significant shifts in priorities and focus for EU agriculture with likely implications for global sustainable development.

Supporting food producers takes centre stage to the detriment of a sustainable systems transformation. In part as a reaction to farmers' protests, the Vision champions food producers' fair standards of living and their competitiveness and the sector's attractiveness. The Vision is not, however, about transforming the EU's food systems, looking only sparingly at the value chain linkages - both domestic and international - and the downstream sectors that EU producers are dependent on. More importantly, food environments and diets are barely mentioned - even though supporting more sustainable diets is crucial to safeguarding the climate and other planetary boundaries. For example, the Vision's discussion of proteins

centres on reducing import reliance by increasing EU production, rather than advocating for the key dietary transition towards plant-based proteins.

From a global food security standpoint, the Vision appears well-suited to sustain Europe's high productivity, overall production and global market contribution, largely by bolstering competitiveness. This trajectory implies that the EU's farm bill might experience fewer drastic alterations than it would under a policy driven by a more stringent climate and environmental agenda. Climate adaptation measures, such as addressing increased water stress, are likely to receive support through the broader European Climate Adaptation Plan. In addition, the Vision signals a more assertive stance in promoting EU agri-food exports and diplomacy in international markets. This includes a notable ambition to enforce a stronger alignment of production standards on imported products, particularly concerning pesticide use. This, however, could impact millions of farmers abroad who are involved in export chains to Europe, and may have limited resources to comply.

From a climate perspective, the Vision explicitly acknowledges the role of the agri-food sector in meeting the EU's overall 55% reduction of greenhouse gas emissions by 2030 and climate-neutrality by 2050. Crucially, it proposes streamlining the CAP by moving away from rules towards incentives for promoting sustainable practices, aiming to cut administrative burdens and provide greater flexibility to farmers. However, critics note this approach does not guarantee that these practices will be more sustainable and risks soft-pedalling the sector's responsibility in climate action.

Transforming the food system from a major climate emitter into a net sink poses immense challenges. Progress has been sluggish, especially when trying to maintain production levels without resorting to politically sensitive measures like reducing animal populations or changing diets. While the Vision offers incentives for change, it's unclear if these are sufficient to drive the profound, systemic transformation needed within the agricultural sector. Furthermore, the Vision doesn't address how agricultural changes would align with shifts in other parts of the EU food system, such as creating more sustainably-oriented food environments that support diets with more adaptation potential. Instead of intensifying efforts to overcome mitigation challenges, there is a noticeable relaxation, especially after the farm gate in the food system. This has potential – though uncertain – negative impacts for decarbonisation of food production and the general food system.

Conclusion: placing European producers centre stage

The EU is a major supporter of global food security and a leader on climate mitigation and adaptation. It is the largest food trader in the world and the most important agricultural importer and exporter to Africa. It faces the immense challenge of transforming its food system from a major greenhouse gas emitter to a net sink, but progress is slow: the share emitted by the EU's food system is rising, mostly as other EU sectors are decarbonising faster.

Responding to farmer protests that targeted in part the EU's environmental and climate policies, the EU launched the Vision for Agriculture and Food, which recalibrates European food policy to prioritise farmer income and competitiveness. This marks a shift from the previous emphasis on food system transformation and the alignment of agriculture and climate goals.

While assessing impacts is difficult as the Vision lacks precise targets and it is unclear how trade partners would react, we use the twin goals outlined in the FAO's global roadmap – achieving zero hunger and aligning food systems with the 1.5°C climate target – as a lens through which to understand shifts in food policy priorities.

With an emphasis on productivity, competitiveness and assertive export promotion, it seems that the EU's contribution to global markets - and global food security - might change less than previously thought.

From a climate perspective, moving from rules towards incentives for sustainable practices raises concerns about achieving the necessary and difficult rapid decarbonisation in the agricultural sector. More importantly, the Vision departs from a previous policy ambition to transform the EU's food system, which calls into question the Vision's alignment and coherence with needed changes across the broader food system.

In sum, European food producers take the centre stage. In hoping to keep tractors out of Brussels, the EU reduced its food system ambitions. While other EU industries continue their transformation, the food system now risks accounting for a growing share of the continent's emissions, inevitably leading to persistent calls for greater climate action. Getting the intricate balance between climate and food right is tricky, equally so in Europe as in the rest of the world.

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