

Observatory

global observatory of public support for agriculture and food

A tool to understand, compare and steer agricultural policies towards greater sustainability.

↘ Open access

FARM
Fondation pour l'agriculture et la ruralité dans le monde
RECONNUE D'UTILITÉ PUBLIQUE

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Why an Observatory?

Making fragmented public action easier to understand

Agriculture and food systems lie at the heart of today's major global challenges. They shape food security, rural incomes, climate resilience, employment, poverty reduction and the preservation of natural resources.

Yet support policies for these key sectors remain difficult to compare. Data are scattered, collection and analytical methods vary across institutions, and a significant share of public action cannot be read directly from budgets. Governments support agriculture and food not only through spending, but also through interventions affecting prices, trade and value chains.

Fondation FARM launched the Observatory to meet this need for greater clarity. Since its creation in 2018, the tool has expanded to include updated data, analyses, interactive indicators and country profiles. Throughout its development, one objective has remained constant: to show what governments actually do to support agriculture and food, and to foster a better-informed debate on how that support is directed.

Data to inform public decision-making

The Observatory is built on a simple but strong conviction: agricultural and food systems cannot be transformed without understanding how public policies shape the incentives, investments and priorities of the actors involved.

Its role is not to promote a single model. Agricultural, economic and institutional contexts differ too widely from one country to another. Its purpose is to make public policies **easier to understand**, to better assess their effects, and to support informed debate.

The Observatory addresses four key questions:

→ Which actors receive support?

→ Through which instruments?

→ With what resources?

→ To serve which objectives?

In this sense, the Observatory is both a **dataset** and an **analytical resource**. It also helps open up a **space for dialogue**.



Methodology: an integrated analytical framework and a rigorous approach

The Observatory draws on data produced by recognised international sources, notably the OECD, the Inter-American Development Bank (IDB) and FAO's MAFAP programme. It is not intended to replace these initiatives, but to make their data easier for all food-system actors to understand, compare and use.

The approach involves harmonising the available information and placing it in context, with particular attention to source traceability, methodological transparency and careful interpretation.



Three groups of indicators are analysed:

1- **Public expenditure on support for agriculture and food** (budgets, subsidies, collective services).

2- **Market price support**: transfers resulting from distortions between domestic and international prices

3- **Total support**: a combination of the two, where data allow

The Observatory covers 93 countries that together account for more than 90% of the value of global agricultural production, with time series available from 1986 to 2022 depending on the sources and indicators used.

Where relevant, the Observatory also directs users to complementary tools, including those developed by FAO, MAFAP, AgIncentives, FAPDA, the OECD and the IDB, to facilitate access to data, methodological frameworks and information on national policies.

What about AI ?

For the time being, Fondation FARM does not use AI for the analyses presented in the Observatory.

Data processing, interpretation and contextual analysis rely on human expertise and methodological verification of the sources used. In the future, some AI tools may be explored to facilitate the updating, structuring or visualisation of information.

Who is the Observatory for ?

The Observatory was designed to be useful to a **wide range of stakeholders**, from public decision-makers to citizens engaged in agricultural issues.

Target audiences	How the Observatory adds value
Public decision-makers (ministries, agencies, regional institutions)	Place national policies in an international context; identify budget priorities; understand the composition of support.
Donors and development partners (bilateral and multilateral banks and funds, international organisations)	Inform funding decisions; facilitate dialogue with governments; align interventions with national policies.
Farmers' organisations	Understand public policies; formulate priorities; strengthen advocacy.
Businesses in the agricultural and agri-food sectors	Understand the public-policy environment and support dynamics that shape value chains and inform their strategic decisions.
Students, researchers and academics	Analyse trends in support and differences across countries and regions, and compare the effectiveness of public policy instruments.
Media and journalists	Access Fondation FARM's expertise: reliable data, infographics and concise analyses that make agricultural policies easier to understand.
Engaged citizens	Access information, develop a critical perspective and contribute to democratic debate through reliable data.



Kako Nubukpo

WAEMU Commissioner for Agriculture (2021-2024)

« By pointing out that countries in the Global North devote around 20% of agricultural value added to supporting agriculture, compared with 4-5% in the Global South, FARM informs decisionmakers' thinking and contributes to the debate without taking the place of public decision-makers. »

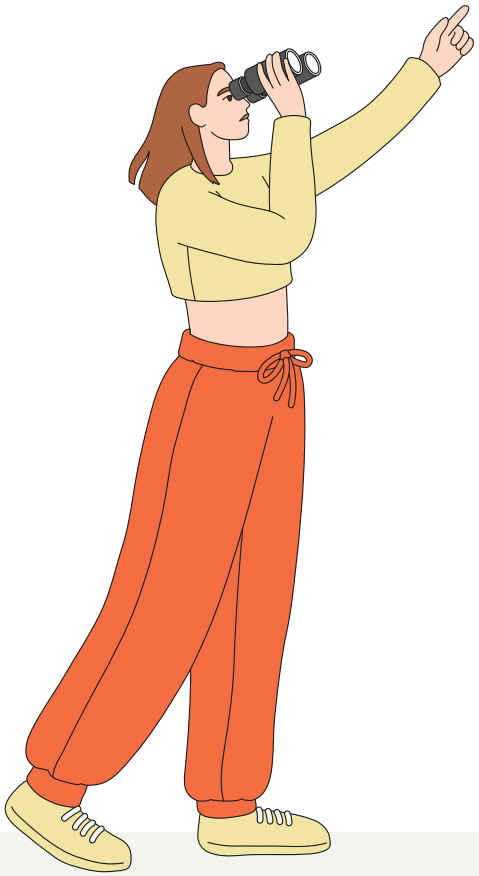
The Observatory at a glance

Explore the Observatory

A tool designed for every level of analysis

An interactive interface for navigating complex data

The Observatory offers a browsing experience organised around several levels of analysis, from a global overview down to individual countries.



→ Home page and global overview

Where countries stand globally, access to major regional analyses, and an overview of the amounts and worldwide distribution of support.

→ Support indicators

Three complementary entry points :

- **interactive mapping ;**
- **composition of expenditure** ;
- **country comparison.**

Data can be viewed as maps, charts and dynamic tables.

→ Visualisation tools

Interactive charts let users explore trends over time, compare countries, and break down support by type of instrument, beneficiary (producers, consumers, collective services) or agricultural product.

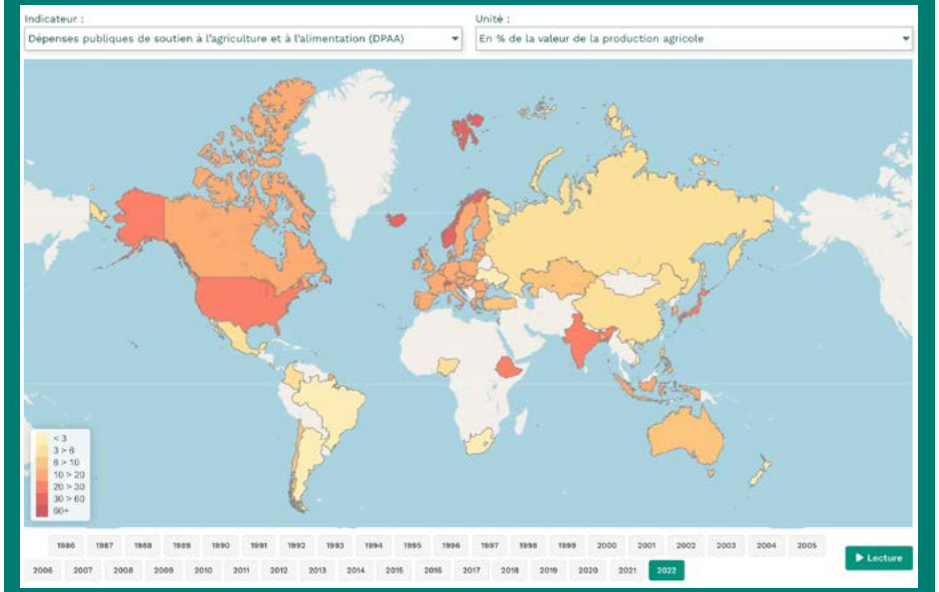
Watch the Observatory video →

Support indicators

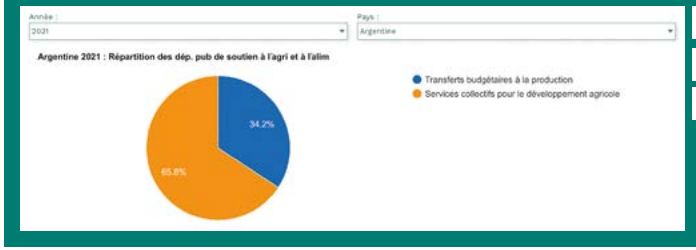
△ All data can be downloaded in Excel format.

→ Mapping

Step 1: Choose an indicator | **Step 2:** Choose the unit | **Step 3:** Choose the year



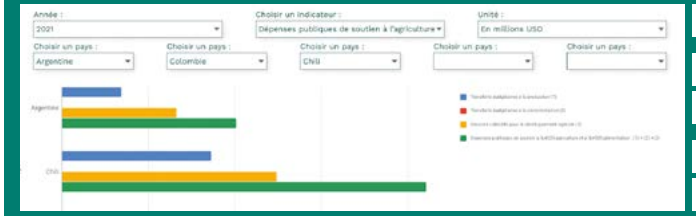
→ Composition



Step 1: Choose the year

Step 2: Choose the country

→ Comparison



Step 1: Choose the year

Step 2: Choose the indicator

Step 3: Choose the countries to compare

Interview with Abdoul Fattath Tapsoba

Project Manager



Why was this Observatory created ?

Public support for agriculture involves billions of dollars and shapes our ability to respond to food, economic and environmental challenges. Yet it remains difficult to track over time, compare across countries and assess.

By providing accessible, comparable data for 93 countries, the Observatory brings public-interest information that used to be hard to find into the open, helping to inform decisions and public debate.

What do the Country Profiles help us understand ?

They help users look beyond headline figures and international comparisons. Each Country Profile puts support in its national context, showing how it evolved, what it is made up of, and the main directions of the country's agricultural policy.

What do you want the Observatory to achieve in practice ?

To better inform public debate and decision-making. The question is not only how much governments spend on agriculture, but also how that support is targeted and which priorities it serves, so that it can more effectively drive the transformation of agricultural and food systems in the face of major economic, social and environmental challenges.

Country Profiles

For a more detailed understanding of national contexts

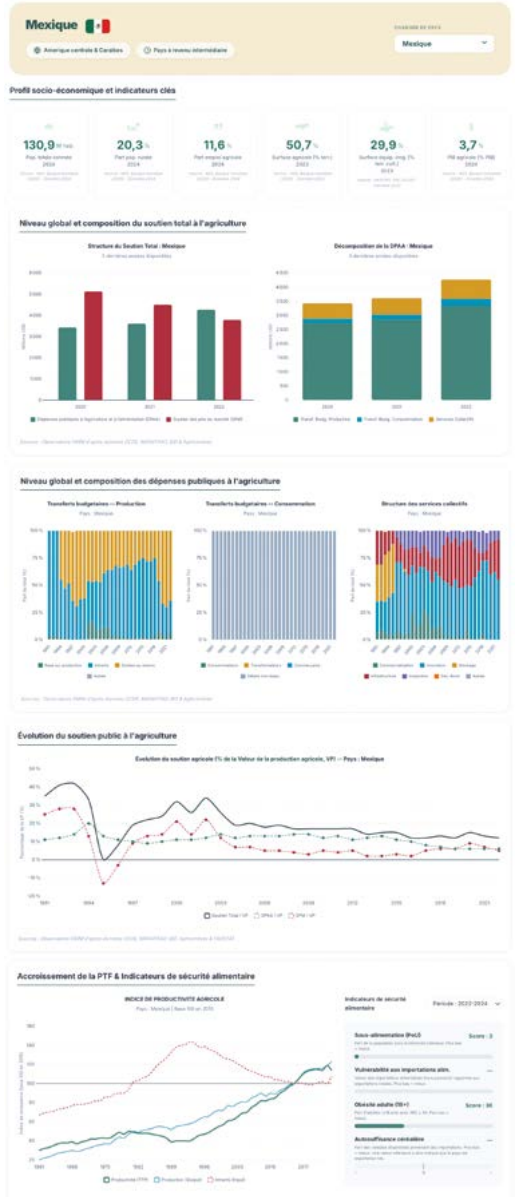
Country Profiles are one of the Observatory's most recent developments.

They give a quick understanding of the structure of agricultural support in a given country: expenditure levels, composition, trends, and comparisons with other countries or regions.

Each Profile connects global indicators with national realities: the agricultural sector's share of the economy, changes in total support, and the relative importance of support to producers, consumers and collective services.

These Profiles facilitate country analysis, project scoping, policy dialogue, regional comparisons and sector analysis.

→ *Example: Mexico "Country Profile"*



10 key findings from the Observatory

1. The more countries depend on agriculture, the less they support it

There are very large global disparities in public support. Overall, the higher a country's income, the more it spends to support its farmers. Europe and North America, the world's leading exporters, are also the regions that spend the most.

2. Spending is concentrated in a few regions

Averaged over the three most recent years for which data are available, spending exceeds **USD 542 billion**. Nearly **90% of this amount** is concentrated in four major regions: East Asia, North America, South Asia, and Western and Central Europe.



← More than USD 542 billion in public expenditure on support for agriculture and food

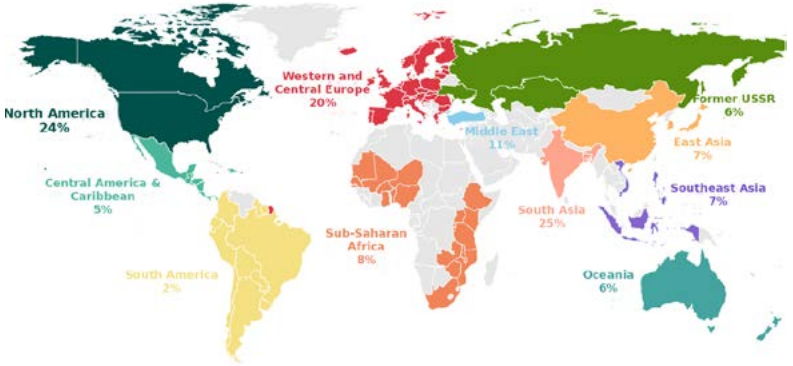
(average over the three most recent available years)

Source: FARM calculations based on OECD, MAFAP and IDB data.

3. The scale of support cannot be assessed from absolute amounts alone

Relative to the value of agricultural production, public expenditure averages **14% worldwide**. South Asia reaches 25%, North America 24%, and Western and central Europe 20% - compared with **8% in sub-Saharan Africa** and **2% in South America**.

↓ Public expenditure on support for agriculture and food by region, as a percentage of the value of agricultural production *(average over the three most recent available years)*



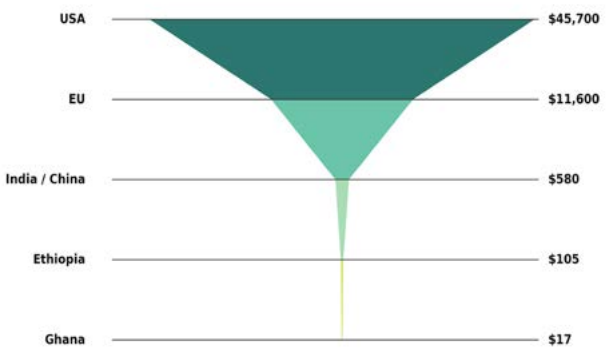
Source: FARM calculations based on OECD, MAFAP, IDB, FAO.

4. A huge global gap in support per agricultural worker

Support expenditure per agricultural worker in the **United States** is **80 times** higher than in **India/China** - and **2,690 times** higher than in **Ghana**.

↓ Public expenditure on support for agriculture and food per agricultural worker

(average over the three most recent available years)



Sources: FARM calculations based on MAFAP, IDB, OECD, USDA, FAO and ILO data

5. Different spending priorities

Some countries support producers directly, while others prioritise consumers or collective services. Globally, **around 60% of expenditure** consists of transfers directed towards production or producers.

6. Producers receive 14 times more support in high-income countries

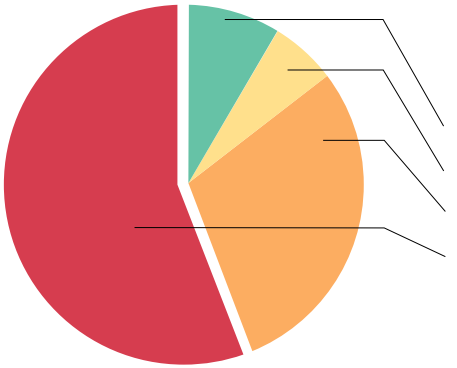
Budget transfers to producers are **14 times higher** in high-income countries than in low-income countries. Sub-Saharan Africa lags far behind, with support to producers averaging less than **1% of the value of agricultural production**.

7. Limited consumer support in low-income countries

High-income countries provide greater support for food consumption (5% of the value of agricultural production). In North America, this share reaches 13%. In low-income countries, such mechanisms remain very limited.

8. Sub-Saharan Africa: a distinct pattern

More than **86% of agricultural support** expenditure in sub-Saharan Africa is directed towards collective services. Of this, 30% supports agriculture directly — including infrastructure, agricultural extension, training and research — while 56% consists of broader rural development spending, such as health, education and road, that supports agriculture indirectly. Transfers directed specifically towards production account for around **8% of expenditure**.



← Sub-Saharan Africa: composition of public expenditure on support for agriculture and food

(average over the three most recent available years)

Budget transfers to production **8 %**

Budget transfers to consumption **6 %**

Collective services directly supporting agriculture **30 %**

Collective services indirectly supporting agriculture (rural development spending) **56%**

Source: FARM calculations based on MAFAP data.

9. Market price support: the less visible side of agricultural policies

Market price support (MPS) is not a budgetary outlay. It estimates the effect of public policies on agricultural prices through import tariffs, guaranteed prices, export taxes and other measures. **East Asia** provides the highest level of price support to agriculture (**USD 243 billion**, driven mainly by China). By contrast, **South Asia** records strongly negative MPS (**-USD 120 billion**, largely due to India).

10. Meat and cereals are the most supported products

Pork, poultry, beef and sheep meat, together with **rice and maize**, account for a large share of positive support. By contrast, **milk is the most penalised** commodity worldwide. Some export crops - mangoes, palm oil and bananas - are implicitly taxed.

↓ Agricultural price support (USD million)

Annual average over the three most recent available years

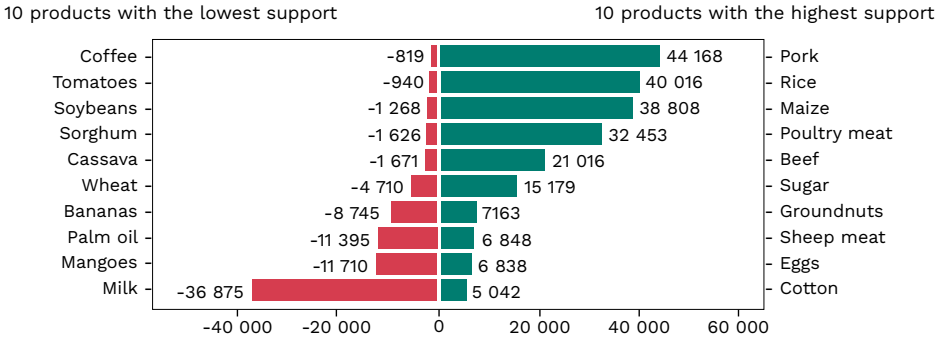




Photo de @Dawid Zawita

A growing presence in public debate

Since its earliest work, the Observatory has helped establish Fondation FARM as a recognised voice in the debate on agricultural policies and public support. Its analyses inform public decisions, publications and media coverage on agricultural finance, food sovereignty, trade and food-system transitions.



A presence in the media and institutions

This visibility has been built through coverage by a wide range of general-interest and specialist media.

AFP · jeuneafrique · Le Monde Afrique · Terre-net · Les Echos · agriDées · THE CONVERSATION

The Observatory has also brought FARM's expertise to institutional and regional forums, including discussions marking the **20th anniversary of WAEMU's agricultural policy**, as well as conferences organised by **CATIE** (Costa Rica), **CIRAD**, the **French agency for development** and the **Mohammed VI Polytechnic University** (UM6P).

Strategic partnerships

In 2025, Fondation FARM forged two strategic alliances to amplify the impact of the Observatory's findings:

AKADEMIYA

A pan-African think tank conducting research on agricultural policies.

ATLAS
Agricultural Transitions Lab for African Solutions

A partnership creating synergies between the Observatory's global analysis of public support and the ATLAS Barometer's coverage of agricultural finance across Africa, to better identify financing needs, gaps and levers for supporting transitions.



Dr Debisi Araba
Managing Director, AKADEMIYA2063

« At a time when constrained resources are reshaping traditional development support, we must rethink cooperation to ensure we are prepared and equipped to respond to the continent's evolving needs. Preparation requires strong institutional infrastructure, robust capacities, and effective systems, and this partnership with FARM and AKADEMIYA2023 provides a practical platform to advance that agenda. »



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Would you like to join an initiative serving the public interest and help open up spaces for debate and decision-making ?

The Observatory is built on cooperation. Its value rests on the quality of the data it draws on, methodological rigour, and its ability to build bridges with decision-makers, donors, farmers' organisations and research networks.

To work with us, contact:

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→ **Abdoul Fattath Tapsoba - Project Manager**
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About Fondation FARM

Fondation FARM works to shed light on agricultural and food-system transformations, using expertise, data and dialogue to promote more sustainable, equitable and resilient agricultural development.

↘ fondation-farm.org

[Observatory]

Understanding public support, today helps shape better agricultural policies for tomorrow.

The Observatory is freely available online:

→ fondation-farm.org/observatoire/accueil/

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