

AGRIBUSINESS ATLAS

Facts and figures about the corporations that control what we eat 2026



■■■ HEINRICH
BÖLL
STIFTUNG

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INTERNATIONAL PANEL OF EXPERTS
ON SUSTAINABLE FOOD SYSTEMS

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Europe**

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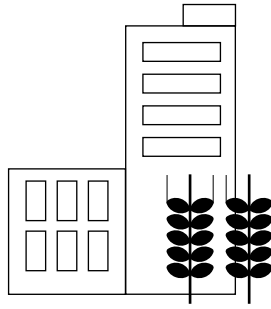
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AGRIBUSINESS ATLAS

Facts and figures about the corporations that control what we eat

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44 FAIR PRICES FOR FARMERS

WHEN PRICES FAIL TO SUSTAIN INCOMES

Deregulation of agricultural markets has led to volatile prices, unequal subsidies and farmers often selling below production costs. This undermines livelihoods and sustainable farming. Stronger European market regulation and fair pricing rules are needed to secure stable incomes and sustainability, and drive the much-needed agroecological transition.

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FOREWORD

The world faces its fourth wave of global food price crises in just 20 years. We must confront one of the root causes of why our food systems are failing to feed the world sustainably and why they remain so vulnerable to geopolitical and economic shocks: the corporate power that shapes how our food is grown, processed, marketed, and consumed.

Since the early 20th century, the agrifood sector has undergone massive consolidation, creating vulnerabilities throughout the global food system. First, crop production has become concentrated around a handful of staples, with maize, rice, and wheat accounting for at least three-quarters of global cereal output. Second, geographic concentration has left the global food supply dependent on a small number of so-called breadbasket regions, such as Ukraine and the North China Plain. Third, international trade is routed through logistical chokepoints, the strategic vulnerability of which has most recently been illustrated by the blockade of the Strait of Hormuz. Finally, corporate concentration has reached unprecedented levels. Just four corporations control 61 per cent of the global pesticide market, 56 per cent of the commercial seed sector, 43 per cent of farm machinery production, and 24 per cent of the global fertiliser market, respectively.

Policymakers should be alarmed by the widening gulf between record corporate profits and rising global hunger during periods of crisis. Following Russia's full-scale invasion of Ukraine in 2022, global food exports fell by an estimated 7 million tonnes. Despite this marginal physical deficit – amounting to less than one per cent of global crop production – speculation drove wheat prices up by 50 per cent in the first month of the war, generating an estimated 1.9 billion US dollars in profits for hedge funds from wheat, maize, and soya bean trades. Financial

” Only a few corporations currently dictate what is grown, sold, and ultimately ends up on our plates

investors were not the only beneficiaries of the war. In 2022, the world's five largest agricultural trading corporations tripled their profits compared with their 2016–2020 average, while the nine leading fertiliser firms increased their profit margins to an average of 36 per cent. As corporations and investors amassed unprecedented gains, the global population paid the price: food prices soared and the number of people facing acute food insecurity rose by 65 million in a single year.

Strikingly similar dynamics are now unfolding in the current global crisis triggered by the US-Israeli war against Iran. Roughly one-third of the global fertiliser trade normally passes through the Strait of Hormuz. The blockade has enabled major firms to reap windfall profits, while farmers struggle with soaring input costs. In March 2026, the chief executive of Nutrien, the world's largest fertiliser corporation, sold shares worth nearly 5 million US dollars, netting a profit of 1.8 million US dollars. Meanwhile, insiders at CF Industries, the world's largest ammonia producer, offloaded shares worth more than 50 million US dollars during the first two months of the Hormuz blockade. By March, the United Nations' World Food Programme had warned that the conflict could push an additional 45 million people into acute hunger.

Yet the problems posed by concentrated corporate power in global food systems extend far beyond crisis profiteering and food price spikes. Most agrifood

giants have transformed market dominance into political influence through lobbyists and industry groups such as CropLife Europe, which represents the pesticide sector. At the same time, these corporations profit from the very crises they help create and exploit them to obstruct sustainability reforms – even seeking to reverse decades of hard-won environmental and social progress. From Brasília to Brussels and from Nairobi to Washington, DC, these actors employ tactics long perfected by the tobacco and fossil fuel industries: downplaying the environmental and public health harm of their business models while blocking or weakening regulation.

The recent battle over pesticide regulation in the European Union (EU) serves as a stark example. When the European Commission announced a target in 2019 to cut pesticide use by 50 per cent, the agrochemical industry launched an unprecedented lobbying campaign. By commissioning a series of so-called impact studies portraying pesticide reduction as a threat to food security, an alliance of industry groups, the farming lobby Copa-Cogeca, and centre-right members of the European Parliament succeeded in derailing the proposal. Since then, the European Commission has moved even closer to long-standing industry demands. In a 2025 proposal unveiled under the banner of simplification and competitiveness, the European Commission set out plans to scrap mandatory safety reassessments for most pesticide active ingredients – previously required every 10 to 15 years – effectively paving the way for lifetime approvals. Experts view this as the culmination of years of industry efforts to cast doubt on evidence of harm and to entrench more industry-friendly assessment standards. This shift forms part of a broader agenda, both within the EU and beyond, aimed at weakening environmental and social protections across all sectors.

“ We need more food democracy: everyone involved must help shape a fair and sustainable food system

This atlas not only documents the damaging impacts of corporate power within the food system but also highlights practical alternatives and successful efforts to curb corporate dominance and guarantee access to healthy, affordable food. The solutions showcased range from stronger anti-trust policies designed to halt further consolidation and break up dominant firms, to regulations that strengthen farmers’ bargaining power and secure fairer prices. Equally inspiring are examples from around the world showing how public procurement can reshape food systems while supporting family farming and agroecological production: from public buffer stocks to stabilise prices during crises to large-scale school meal programmes and even publicly owned grocery stores. The tools needed to curb corporate power already exist. What is missing is the collective power and political courage to deploy them.

We hope this atlas provides both insight and inspiration, and trust that you will find it as illuminating to read as it was to compile.

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12 BRIEF LESSONS

ABOUT CORPORATE POWER

1

A handful of corporate giants control what ends up on our plates. By dominating the markets for **PESTICIDES, FERTILISERS, SEEDS, AND FARM MACHINERY**, they entrench an industrial model of agriculture.

2

In many countries, **A HANDFUL OF RETAIL CORPORATIONS** dominate almost the entire sector. With this market power, they dictate prices and **SQUEEZE PRODUCERS' INCOMES**.

3

The global food system is responsible for around **A THIRD OF WORLDWIDE GREENHOUSE GAS EMISSIONS**. Some meat and dairy giants produce emissions on a scale comparable to that of major oil corporations.

4

Corporate power drives the production of **ULTRA-PROCESSED FOODS** because they yield the highest profits. The consequences are profound: in the European Union (EU), around **A THIRD OF DEATHS FROM CARDIOVASCULAR DISEASE** are linked to an unhealthy diet.

5

Global agribusiness players exploit **WEAKER ENVIRONMENTAL AND HEALTH STANDARDS** in the Global South in pursuit of higher profits. The EU continues to permit the export of vast quantities of pesticides prohibited within Europe itself.

6

To protect their business model, agribusiness corporations engage in **EXTENSIVE LOBBYING**. One example among many: More than 50 million euros were spent between 2020 and 2023 to block stricter EU rules on pesticides.

7

GIANT FOOD CORPORATIONS have channelled significant funding to multilateral food agencies. Voluntary funding now makes up 65 per cent of the UN Food and Agriculture Organization's budget and all World Food Programme funding.

10

More and more farms are closing because they can no longer cover their costs. **FAIR PRICES** are ultimately **A POLITICAL ISSUE**: many strategies exist that enable farmers to earn a decent living.

8

FINANCIAL SPECULATION drives up food prices, enriching a small minority while pushing millions around the world into **HUNGER AND POVERTY**.

11

Competition law is one of the most **EFFECTIVE TOOLS FOR CURBING OLIGOPOLIES**. Regulators must intervene more forcefully to limit market concentration and restore fair competition.

9

DIGITAL TECHNOLOGIES have the potential to ease the burden of agricultural work. At the same time, however, they are increasing **DEPENDENCE ON POWERFUL GIANTS** such as Amazon, Microsoft, and Bayer.

12

FOOD DEMOCRACY means ensuring that corporations no longer dictate how our food is being produced and distributed. **HEALTH, CLIMATE, BIODIVERSITY, AND DECENT WORK** can only be protected if the food system is shaped collectively by all those involved.

HOW OUR FIELDS TURNED INTO FACTORIES

Today, just a handful of corporations determine what is grown in our fields, what ends up on supermarket shelves, and ultimately what we eat. This concentration of market power did not emerge overnight. As early as the 19th century, new machinery enabled the cultivation of ever larger areas of land with fewer workers. In the 20th century, the introduction of synthetic fertilisers and pesticides further accelerated this consolidation of power. Smaller farms came under increasing pressure, and so did the natural environment.

From a historical perspective, the fact that farmers buy their inputs on the market is a relatively recent development. Barely 200 years ago, farmers saved their own seeds, crafted tools by hand, and fertilised with organic waste and manure from their own farms. Hedgerows, tree lines, crop rotations, and wetlands provided vital habitats for beneficial species such

as birds, spiders, and predatory insects that helped keep pests under control.

With industrialisation, all of this changed fundamentally. From the 1830s onward, groundbreaking innovations like the mechanical harvester and the steel-tipped plough enabled much larger areas to be cultivated. At the same time, trade in nitrogen-rich guano and mineral fertilisers such as potassium and phosphorus – sourced from bone and rock – began to expand. These nutrients promoted plant growth, and targeted fertilisation suddenly made it possible to achieve higher yields and cultivate ever larger tracts of land.

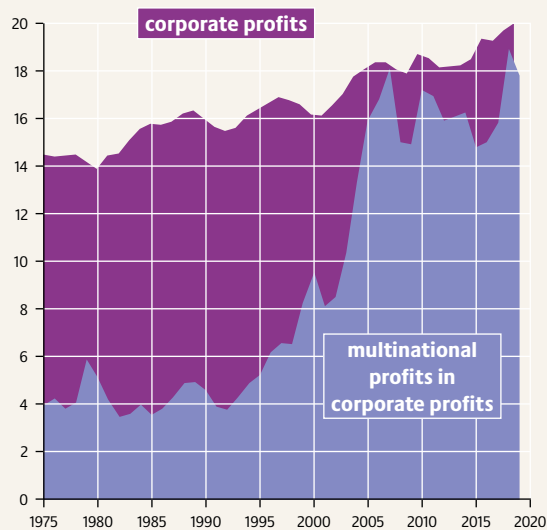
At the beginning of the 20th century, the industrial model of agriculture gained further momentum, with the introduction of petrol-powered tractors. A new development was the use of agrochemicals: synthetic nitrogen fertilisers, pesticides from the laboratory, and hybrid seeds designed to produce high-yielding crops began to be widely used in fields. Political measures, including the Agricultural Adjustment Act (AAA) introduced under the 1930s New Deal in the United States, also contributed to the advance of industrial agriculture which, in turn, benefited the dominant input firms in the sector. By the late 1930s, large-scale monocultures had become commonplace in many regions that were heavily reliant on machinery, agrochemicals, and purchased seeds.

As industrial farming methods spread, stable and profitable markets emerged. Early industry leaders rapidly grew into dominant forces – first in North America and Europe, and later globally. The 19th century saw the founding of major agribusinesses such as Bayer and BASF in agrochemicals and Deere & Company in farm machinery – all of which remain influential to this day. Over time, these corporations acquired numerous competitors, thereby securing ever greater market shares. The modern global player Corteva Agriscience, for instance, has roots that reach back into the 19th century and was formed through the spin-off of the merged agrochemical giants Dow and DuPont.

This concentration of power began in a handful of countries with vast expanses of grassland – territories

THE RICH GET EVER RICHER

Global corporate profits as a share of world GDP, net of capital depreciation, in per cent



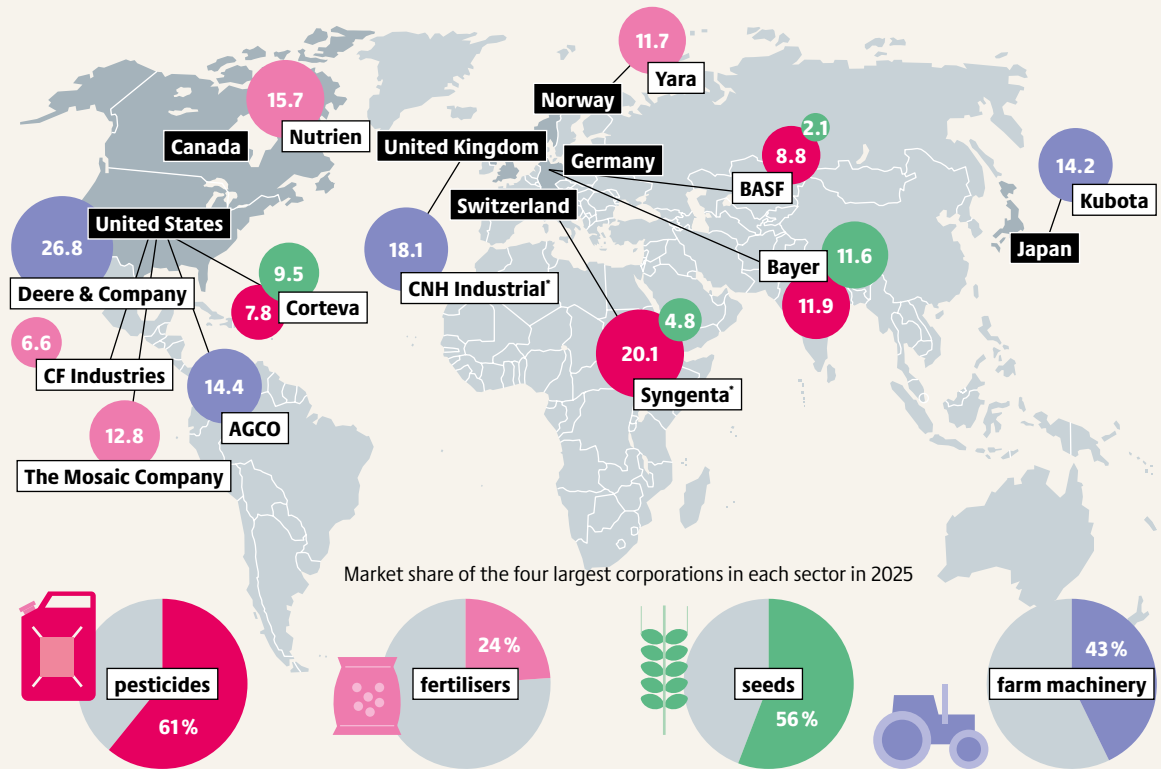
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Food industry created billionaires. The richest is Zhong Shanshan, worth 77 billion US dollars, who controls China's top bottled water corporation

WHO SHAPES OUR DIETS

The four largest agribusiness corporations worldwide by sector in 2023, revenue in billion US dollars

pesticides fertilisers seeds farm machinery



* headquarters location shown

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that were often taken by force and converted into industrial farmland. In other words: Indigenous and local communities were displaced to create space for settlers and agricultural expansion. Countries such as the United States, Canada, Ukraine, Australia, and Argentina were early adopters of industrial farming methods to produce large quantities of grain for export. The advent of steamships and the expansion of railway networks from the mid-19th century onward made it increasingly easy for them to export surpluses – first to Europe and later worldwide. These nations remain key players in the global grain trade to this day.

Alongside the booming grain trade, commodity markets that became increasingly financialised began to emerge – markets where agricultural products were not only traded but also treated as financial investment assets. These markets came under the control of a few major international trading houses. While the first agricultural futures exchanges had already appeared as early as the 17th century – such as the Dojima rice market in Japan or the coffee and spice trade at the Amsterdam Stock Exchange – these markets gained real traction from the mid-19th century, particularly after the repeal of Britain's Corn Laws in 1846. In this period, a few large and influential grain trading corporations

Market power is the product of weak regulation.

At the expense of the many, the few boost profits by suppressing wages and raising prices

emerged – Bunge, Louis Dreyfus, Cargill, and Archer Daniels Midland (ADM) – which continue to dominate the global grain trade today.

Civil society groups and some farming organisations criticise the fact that a small number of very large corporations now control the entire supply chain of the global industrial food system – from agricultural production to food processing to grocery retail. This concentration of power entrenches a one-sided production model: it secures profits for a few global corporations while threatening food sovereignty, health, and diversity. Monocultures, intensive use of pesticides and fertilisers, and resource-intensive practices have serious ecological consequences, including soil erosion, biodiversity loss, and climate impacts. For consumers, food options are less healthy and less diverse. For small farms, economic pressure continues to mount. They become increasingly dependent on market-dominant suppliers and buyers – and are left with little room to pursue sustainable farming practices. ●

INDUSTRY SHAPES POLICY

Corporations and their lobby groups often enjoy privileged access to European and national policymakers. In terms of budget, the number of lobbyists, and meetings with officials, they greatly outnumber trade unions and civil society organisations which defend the public interest.

With the launch of the European Union's (EU) Green Deal in 2019, the EU appeared willing to change course. It set binding targets to reduce pesticide and fertiliser use, while supporting farmers in transition. Yet the European Commission (EC) under President Ursula von der Leyen has undertaken a radical reversal in its second term, allowing corporations such as BASF and Bayer to shape the EU agenda. Europe is now facing an unprecedented push for deregulation that undermines democratic decision-making and threatens essential protections for public health and the environment.

Under the European Green Deal, the EU promised to transform agriculture toward sustainability. This included the Farm to Fork Strategy, which set a target to

cut pesticide use in Europe by 50 per cent. But as soon as that target was proposed, the agrochemical industry launched an unprecedented lobbying offensive.

According to their own declarations in the EU Transparency Register, widely considered underestimates, just nine of the most active industry actors reported spending over 50 million euros between 2020 and 2023 while the pesticide reduction law was under debate. Leaked strategy documents revealed close coordination between the pesticide lobby group CropLife Europe and the farming and agribusiness lobby group Copa-Cogeca. Together with allied agribusiness groups, they commissioned a series of so-called impact studies claiming that reducing pesticide use, restoring nature, and lowering meat production would threaten productivity and food security. In total, six industry-backed studies were funded by CropLife Europe, European Livestock Voice, Copa-Cogeca, Euroseeds, Cocal, the German Grain Club and even the US Department of Agriculture. Lobbyists widely used these studies to scare politicians through events and letters.

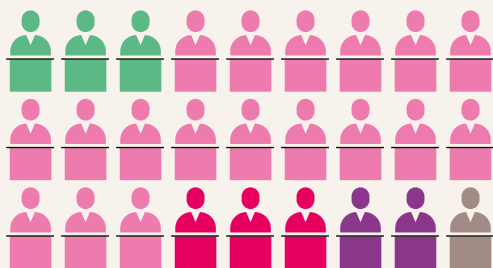
These studies were widely criticised by scientists and the EC's own research services for ignoring benefits of Farm to Fork proposals, excluding alternatives and relying on industry-shaped assumptions. Meanwhile, more than 6,000 independent scientists publicly supported pesticide reduction as essential for long-term food security. Nevertheless, the strategy worked. Negotiations were delayed, additional studies requested, and political pressure mounted. Right-wing Members of the European Parliament ultimately distorted the pesticide-reduction law so severely that it was withdrawn. Its collapse marked more than the loss of a single regulation; it set a precedent for dismantling core Green Deal commitments and signalled a broader political shift toward a new era of weakening regulations.

Now the corporate agenda has shifted from blocking new progressive legislation to dismantling existing safeguards. Under the banner of simplification and competitiveness, the EC has launched so-called Omnibus packages to revise EU laws. This represents a major rollback of protections. The proposal would move toward lifetime approvals for pesticides, ending

BEHIND CLOSED DOORS

Responses from the 27 EU Member States on meetings with lobby groups in 2023 and 2024 during pesticide reduction negotiations

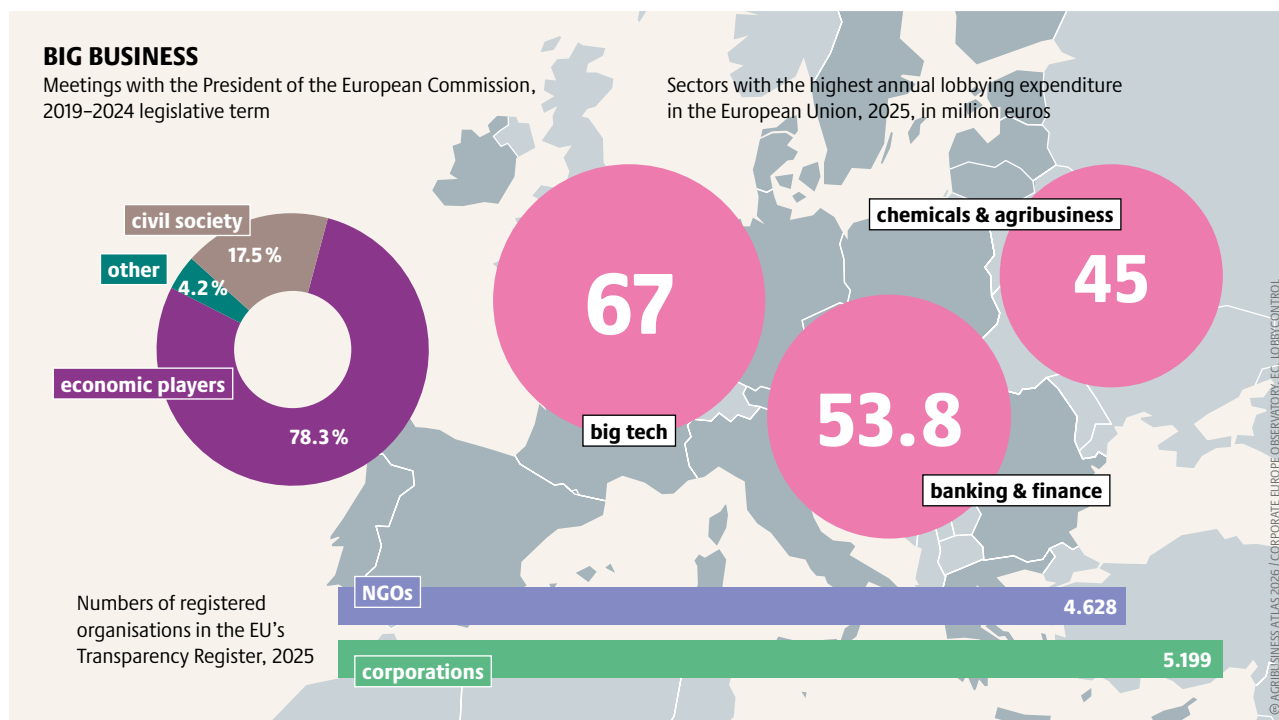
- transparency on meetings held
- no response
- actively refuse to provide information
- state that no meetings took place
- response only provided for a fee



Only **Sweden, Estonia** and **Belgium** published a list of their meetings with lobbyists upon request. **Lithuania** and **Finland** stated that no such meetings had taken place. Germany indicated that processing such a request could cost **up to 500 euros**; a significant barrier to transparency. Many other countries did not respond at all or refused to provide information.

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In 2025, corporations generated 30 billion euros from pesticide sales in the EU. To protect their profits, they invest heavily in lobbying



mandatory safety reassessments every 10–15 years for most of them. In practice, this means most pesticides could remain on the market indefinitely unless authorities intervene under narrow conditions. The proposal also includes other changes, such as the extension of grace periods and the weakening of the ability of new independent science to trigger action.

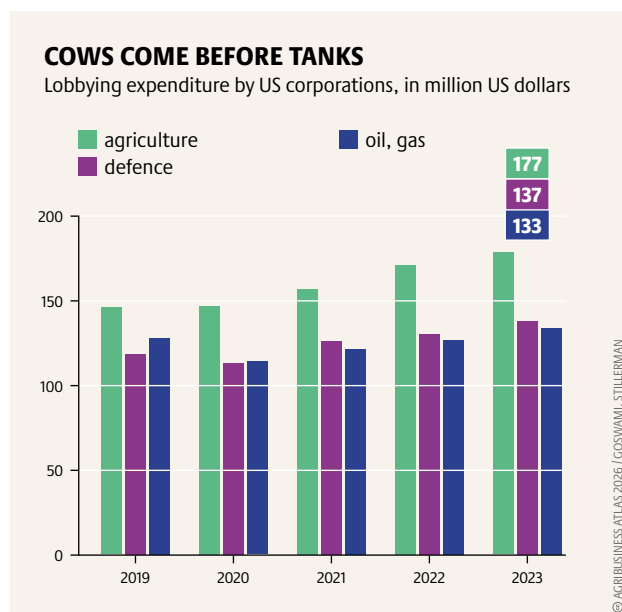
The proposed changes reflect long-standing industry demands. The chemical industry spent decades shaping regulatory methodologies, promoting industry-friendly assessment standards and manufacturing doubt about evidence of harm. They argued that full dossier renewals are burdensome and divert regulatory capacity, and called for unlimited approvals based solely on limited literature monitoring. The Omnibus closely follows this script, driving a structural shift toward weakened oversight. Instead of reducing dependence on dangerous pesticides, the EU is stripping away safeguards and putting corporate profits above health, biodiversity, and long-term food resilience.

Studies indicate that the EC is leaving the door wide open to further industry influence, regardless of the cost to society at large. The EC has held more than 1,300 meetings that mentioned the buzzwords simplification or Omnibus as a topic. Around 85 per cent of those meetings involved industry lobby groups. Why are corporations allowed to exert such extensive influence over rules meant to regulate them when this

Initiatives working towards a fair food system often lack the funding, staff and influence to keep pace with corporations and industry associations

In her first term, Ursula von der Leyen met three times more often with business groups than with civil society

prevents societies from making sound decisions about their future? There are precedents for limiting such conflicts of interest. The UN restricts tobacco industry influence over public health policy. Climate advocates call for firewalls separating fossil fuel lobbyists from climate policymaking. To address the biodiversity crisis, protect public health, and secure a liveable future, governments must keep pesticide corporations out of political decision-making. ●



COWS, CASH, AND CARBON

The world's largest meat and dairy corporations emit as much greenhouse gas as entire countries and resist limits using fossil fuel lobby tactics. Data is key to accountability, but progress on reporting remains slow and under threat.

What we eat has a big impact on the climate. Food systems—including how our food is produced, transported, stored, and distributed—are responsible for about a third of global greenhouse gas (GHG) emissions. The footprint varies widely depending on the type of food and farm practices used. Meat, especially beef, and dairy contribute significantly more to the climate crisis than fruit, vegetables, or plant-based protein. When production is concentrated in industrial factory farms, the damage multiplies: rivers and soils are contaminated, biodiversity declines, rural communities lose out, and animal welfare suffers.

The largest meat and dairy corporations are a major source of GHG emissions. Yet they have largely avoided taking responsibility. Together, the top 5 meat and dairy producers emit as much as one fossil fuel giant like BP or Shell. And like Big Oil, Big Meat and Big Dairy exert influence over policymakers. Research shows major meat and dairy corporations spend millions on lobbying against climate legislation, downplaying the role

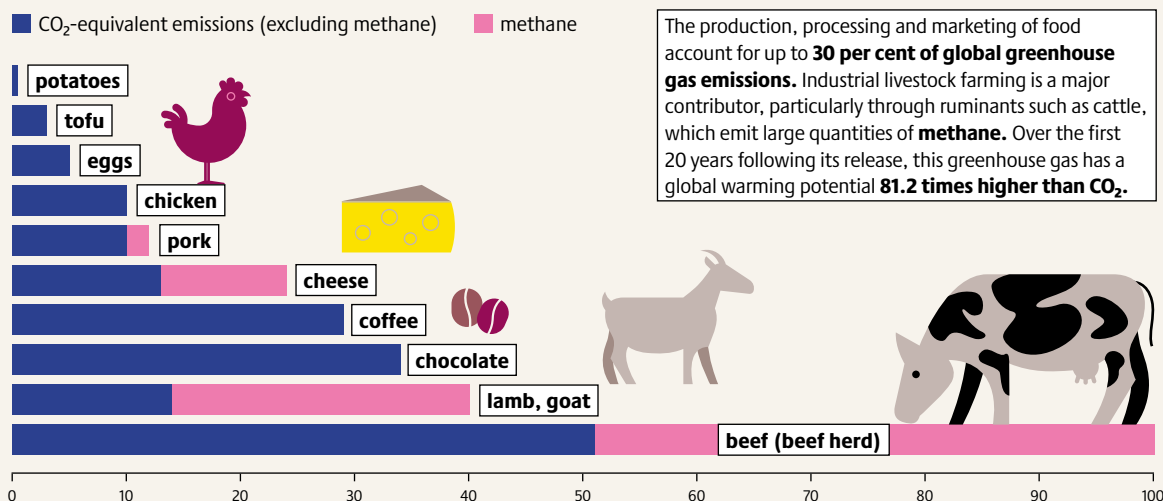
of animal agriculture in a changing climate. In Europe, the industries lobby the right-wing conservative majority in the European Union (EU) Parliament, pushing narratives such as demands for less bureaucracy, while in reality seeking weaker environmental standards. Holistic Europe-wide food system legislation has been abandoned.

Nearly 80 per cent of EU farm subsidies currently support livestock or feed production. Animal-based foods cause most of food-related greenhouse gas emissions in the EU. Environmental organisations and progressive farmers' groups are advocating for a redistribution of these subsidies to promote farming practices that benefit the climate and nature. Yet, in the next round of EU subsidies, starting in 2028, payments risk becoming even less tied to environmental obligations. Civil society groups are also calling for better EU regulations for cost-covering prices for producers. If dairies were legally obliged to pay fairer prices, as it is already under way in Spain, their business model of exporting cheap dairy products would be undermined. Agricultural lobbies label all of this a bureaucratic burden. They demand more subsidies without environmental conditions and oppose fairer trade regulations.

Methane is often overlooked as a driver of the climate crisis. Only 2 per cent of global climate finance is directed towards reducing methane emissions

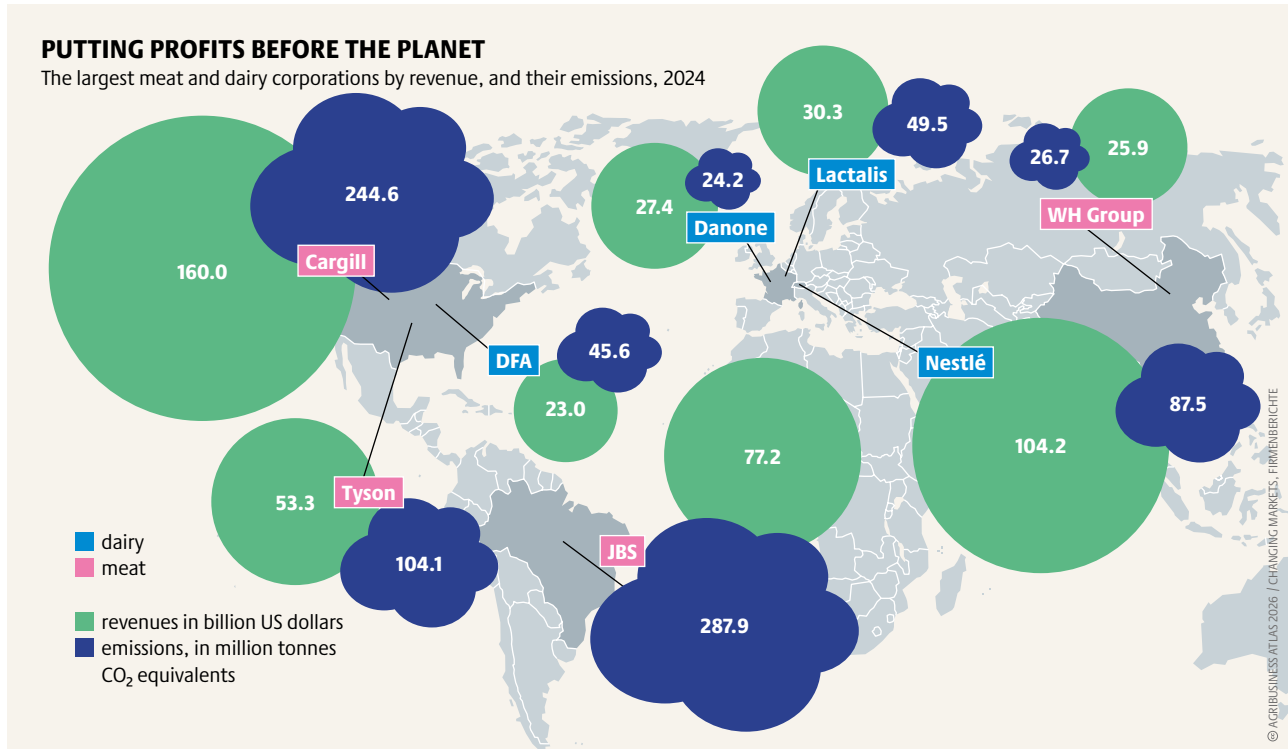
THE ROLE OF LIVESTOCK FARMING IN THE CLIMATE CRISIS

Greenhouse gas emissions in kilograms per kilogram of food, on a 100-year basis



PUTTING PROFITS BEFORE THE PLANET

The largest meat and dairy corporations by revenue, and their emissions, 2024



One of the big EU meat producers is Germany, where livestock farming is responsible for about 70 per cent of the agricultural sector's greenhouse gas emissions. In the 2000s, the meat industry began to grow significantly, after federal and state governments weakened environmental laws, reduced inspections, and channelled billions in subsidies into new factory farms. Research suggests that German meat corporations such as Tönnies, Westfleisch, and Rothkötter may be violating the Supply Chain Due Diligence Act. The allegation is that these companies use soya feed in their supply chains that may be linked to human rights violations and land conflicts in Brazil's Cerrado region. All three corporations were the subject of a written notice to the supervisory authority of the German Supply Chain Act filed by civil society organisations. The results of the official investigation into these allegations have not been made public.

Many climate-harming corporations exploit the lack of standardised reporting, which remains a major obstacle to accountability. Without consistent data, it is difficult to track corporate climate performance or assess the credibility of corporate commitments. Today, the limited information available is scattered across voluntary initiatives and corporate reports, which cover different companies and measure different things.

Meat corporations worldwide are constantly looking for ways to raise capital while sidestepping transparency rules. A prime example is the Brazilian meat giant JBS. For nearly ten years, its attempts to list on the New York Stock Exchange were blocked by the US Securities and Exchange Commission, due to various bribery and

With one billion tonnes of greenhouse gas emissions a year, the 45 largest meat and dairy corporations would rank ninth globally if they were a country

corruption scandals, and labour law violations. Despite prison sentences for executives and several price-fixing settlements, JBS has maintained its political influence. Pilgrim's Pride, a US subsidiary of JBS, donated 5 million US dollars to Donald Trump's 2025 inauguration committee. That is more than donations from several Big Tech firms combined. Soon after, JBS received regulatory approval to list on the NYSE and its shares began trading in mid-2025.

Some governments and the European Commission have begun to close the transparency gap by proposing mandatory reporting rules. This is a step forward, but many rules exclude emissions from the supply chain – known as Scope 3, meaning indirect emissions across a product's lifecycle, from feed production to transport. Yet these emissions represent by far the largest share. Further progress is at risk due to the US abandonment of its federal rules and the EU's reconsideration of its reporting requirements. Some meat and dairy corporations have started publishing more emission data ahead of or under these reporting requirements, but major gaps remain. Disclosing emissions from meat and dairy production continues to lag behind disclosures from other sources like electricity use or food processing, which represent a much smaller portion of a company's emissions. Some corporations still have not reported any emissions or have recently ceased further disclosures. Much remains to be done. ●

BIG FISHERIES TAKE OVER

A handful of corporations now shape what kind of fish and seafood reach dinner plates worldwide. The industry has grown more concentrated and industrialised, from Norwegian salmon farms to global supply chains. Aquaculture has surged, yet wild stocks remain under pressure as fleets push further offshore. The shift is changing who profits and at what cost to consumers and the environment.

One of the world's largest seafood corporations traces its origins in processing wild-caught fish back to late 19th-century Japan. After Maruha and Nichiro merged in 2007, the corporation became the Maruha Nichiro Group and later expanded into tuna farming and seafood distribution. In early 2026, it rebranded as Umios and now operates on every continent except Antarctica.

This example shows that, like many global industries, the seafood sector has come to be dominated by a small number of large corporations. The consolida-

tion is driven by acquisitions of competitors and by corporations expanding across borders, sectors, and supply chains.

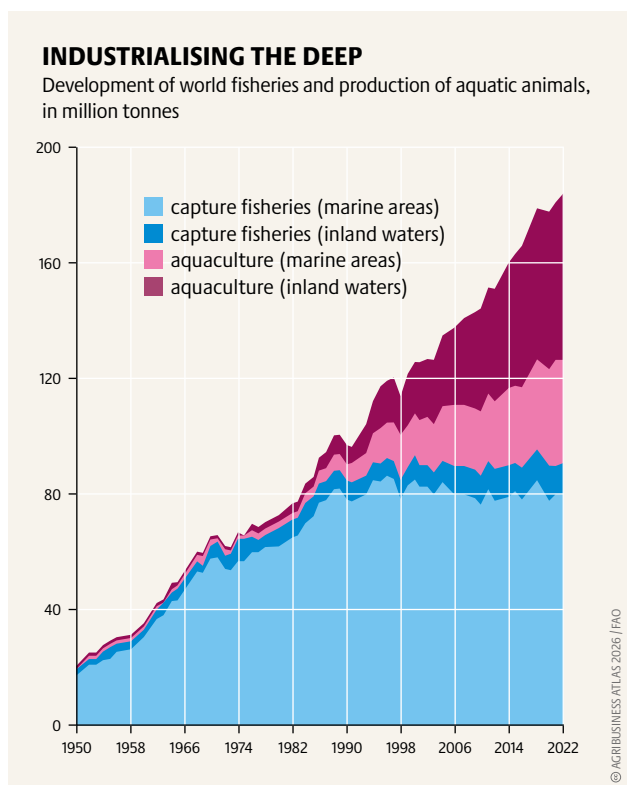
Many of today's leading seafood corporations began as wild-catch processors in Japan or salmon farming businesses in Norway. Salmon production remains concentrated in a handful of countries, including Canada, Chile, Denmark, Norway, and the United Kingdom. In 2023, just 15 salmon corporations accounted for two-thirds of harvest volumes, and consolidation has continued since, with deals such as Mowi's 655 million US dollar investment in Nova Sea.

Since the 1990s, aquaculture production has more than quadrupled, while wild fish catches have remained largely unchanged. By 2022, aquaculture had surpassed capture fisheries in the production of aquatic animals. Some of the species frequently utilised in aquaculture production include carp, oysters, shrimp, and tilapia. Growth has been strongest in Asia, particularly in China. Most production takes place inland, and marine operations produce about 37 per cent of global output by weight.

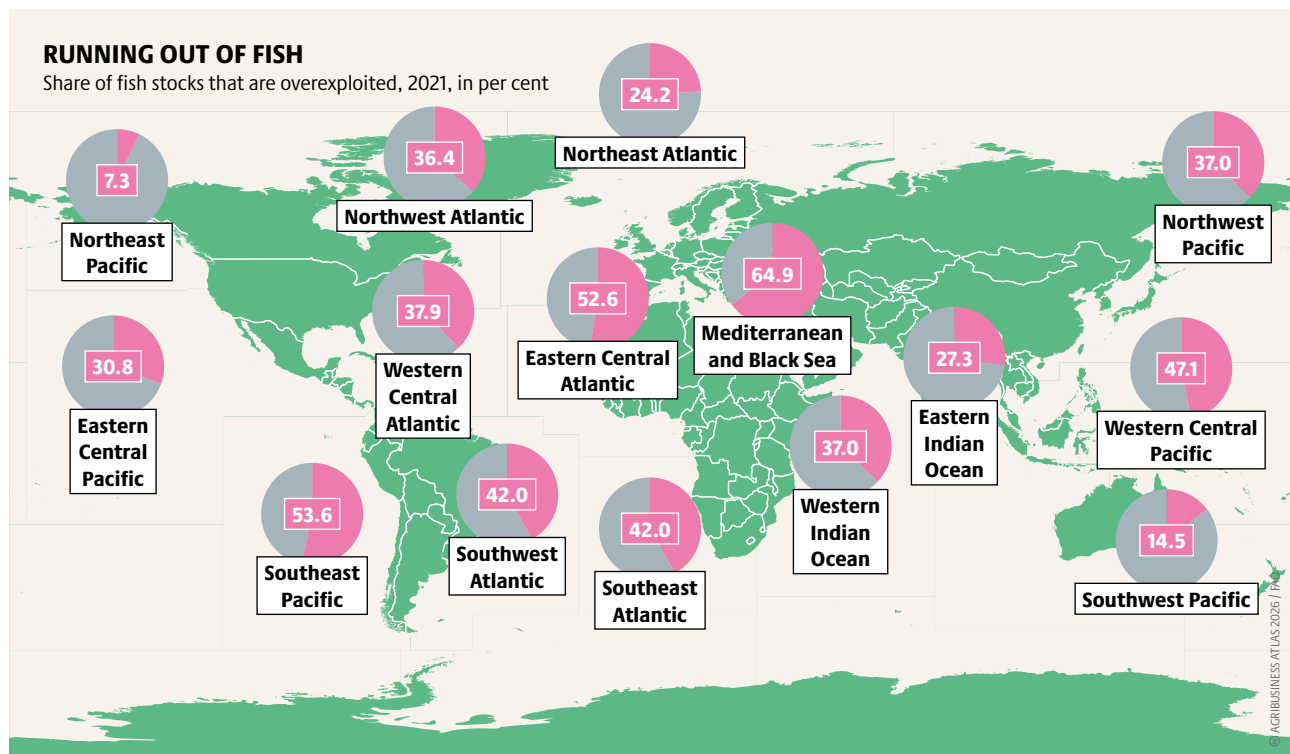
In theory, the rise of aquaculture could reduce demand for wild-caught fish. In practice, it has not. Instead, corporations have continued to expand aquaculture alongside wild fisheries in pursuit of growth. Overfishing continues to deplete wild stocks, and large corporations have adapted by changing how and where they fish – moving further offshore, operating at greater depths, and targeting smaller, previously ignored species. These shifts favour larger players with the financial and technological resources to adapt, contributing to further industry consolidation.

Even larger corporations from other sectors – especially global meat processors – are moving into the seafood sector at a rapidly increasing pace worldwide. JBS has acquired the Australian salmon producer Huon Aquaculture, and the Charoen Pokphand Group has expanded across the shrimp supply chain, from feed mills and hatcheries to farms and processing plants.

In a highly concentrated market, a shrinking number of corporations now decide what ends up on people's plates and how it is produced. The growing market power of a handful of players has also pushed up retail prices. Prison sentences for price-fixing are rare,



89 per cent of caught aquatic animals were used for food in 2022, equal to 20.7 kilogram per person. Most remaining stocks became fishmeal or fish oil



but the former chief executive officer of Bumble Bee Foods was jailed for 40 months in the United States for his lead role in a canned tuna price-fixing scheme. Just three players controlled 78 per cent of US canned tuna sales in 2015, when the collusion was detected. Six leading Norwegian salmon farming corporations have also been accused of fixing prices by sharing information to manipulate spot markets.

Corporations also raise prices through strategies that attract less regulatory scrutiny, such as steering consumers towards more profitable products. For example, Mowi is working to transform farmed Atlantic salmon from an undifferentiated commodity into a branded product that commands higher prices. It has even hired a former Coca-Cola executive to reshape consumer habits – much as Tyson Foods has done with chicken.

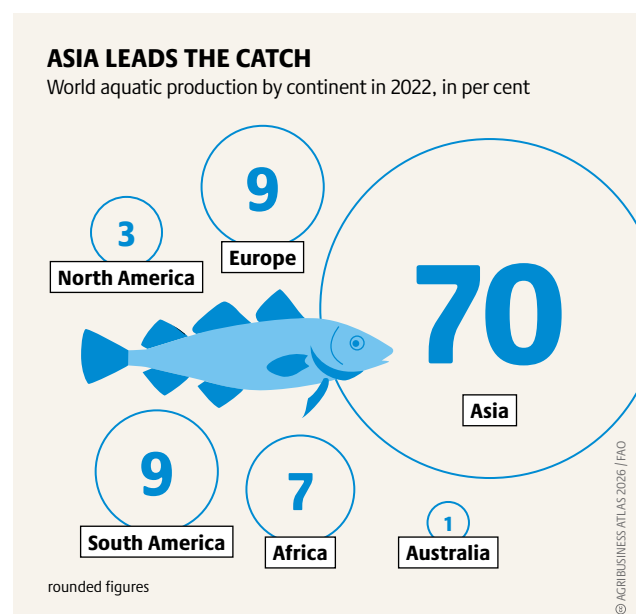
Consolidation has driven the expansion of industrial aquaculture, which relies on high stocking densities and genetically uniform varieties. This often results in heavy use of antibiotics and anti-fouling chemicals, nutrient-rich waste, and farmed fish escaping into the wild, where they can harm natural populations.

Fish and seafood are important sources of nutrition for much of the world's population. Although high-value segments such as farmed salmon and canned tuna are dominated by multinational corpo-

Nearly two-thirds of global marine stocks remain sustainable, but overfishing is rising and gaps between regions remain severe worldwide

rations, others – such as carp farming – remain in the hands of small and medium-sized producers. Smaller operations and shorter supply chains often support food security, create jobs, sustain incomes, and make communities more resilient to disruption. Yet government policies, infrastructure, and subsidies continue to favour large-scale operations, reinforcing the trend towards consolidation. ●

Rapid aquaculture growth may help secure global food supplies, but it is also placing growing pressure on coasts, waterways, and marine ecosystems worldwide



THIRST FOR PROFIT

Access to clean water has been a human right since 2010. Yet this vital resource is increasingly coming under corporate control. Across the world, corporations extract groundwater and spring water, selling it in branded bottles at prices that are often many times higher than those of tap water.

Since 2010, the global bottled water market has grown by more than 70 per cent. Annual revenues now surpass 300 billion euros. The global market is dominated by Coca-Cola, Danone, Nestlé, and PepsiCo. In the United States, their combined market share exceeds 70 per cent. Bottled water is significantly more expensive than tap water, which disproportionately affects low-income households. People who have no access to tap water, or only to water that is unsafe to drink, are forced to bear excessive costs. According to estimates, less than half of the amount spent globally on bottled water could provide hundreds of millions of people with long-term access to clean tap water.

Large corporations in sectors such as mining, energy, agribusiness, and beverage bottling often secure privileged access to water sources through long-term concessions, while local communities are denied the same. A recent United Nations report examining contracts across 34 African and 19 Asian countries finds that

these agreements increasingly resemble private ownership rights. Although water is legally defined as a public good in many countries, these contracts significantly reduce public oversight and restrict local communities' access to it.

According to the United Nations, the privatisation of water is hindering the progress needed to achieve Sustainable Development Goal 6 (SDG 6), which aims to ensure universal access to safe drinking water. Each year, up to 3 billion people experience water scarcity for at least one month of the year.

The consequences of this system are evident worldwide. In San Cristóbal de las Casas, Mexico, a Coca-Cola bottling plant extracts more than one million litres of groundwater every day. At the same time, many residents receive running water for only a few hours per week. This situation is particularly striking given that the state of Chiapas is among the most water-rich regions in Mexico. Nevertheless, more than one-third of rural households there lack access to piped water, and only 7 per cent of residents consider tap water safe to drink. High industrial water consumption, weak regulation, and climate-related drought have intensified shortages, forcing low-income households to rely on bottled water produced from their own local resources.

A similar contradiction can be observed in the département of Puy-de-Dôme in France. After the region experienced drought in 2023, the authorities imposed restrictions on water use. These extraction bans did not apply to the mineral water corporation Volvic, a subsidiary of the food giant Danone, which was permitted to continue supplying its bottling plant with groundwater. In the same year, Danone reported profits of 881 million euros and paid out 1.2 billion euros in dividends.

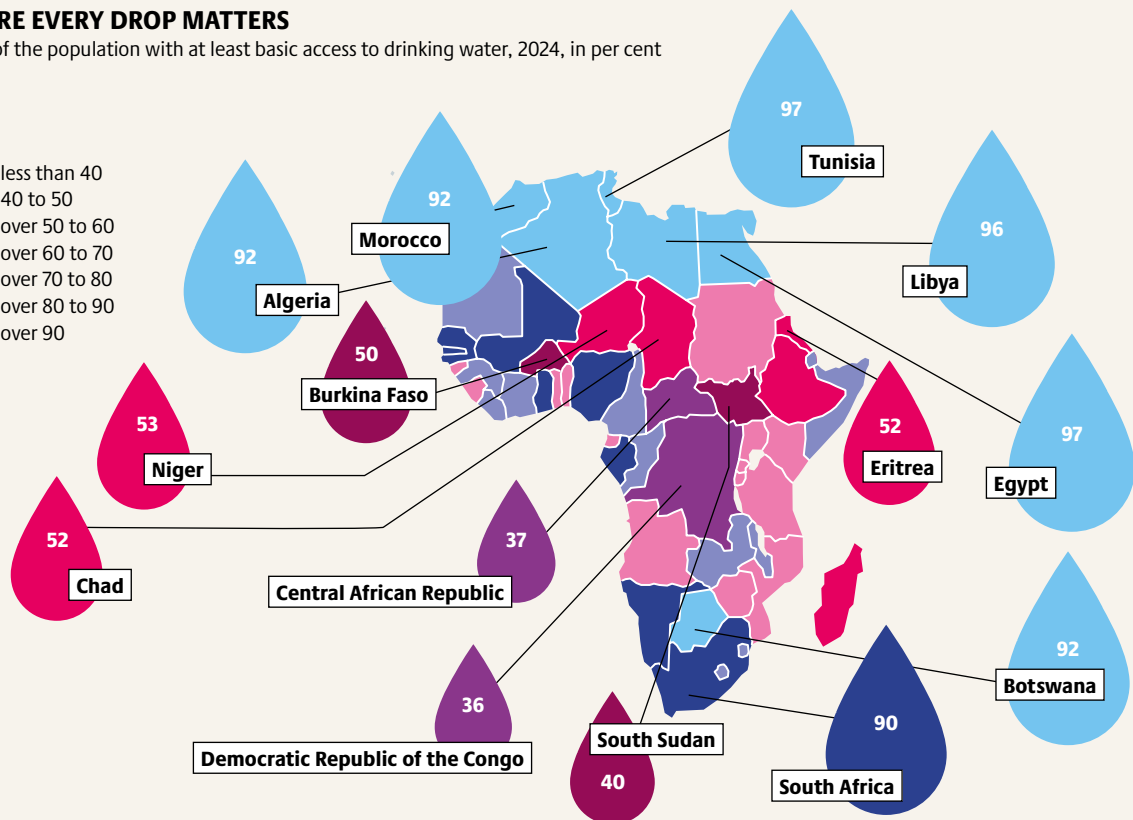
In the driest region in the world, Chile's Atacama Desert, lithium and copper mining have become major drivers of groundwater depletion and pollution, and environmental stress. Corporations extract lithium by pumping mineral-rich brine from underground aquifers and evaporating it in large ponds, a process in which between 85 and 95 per cent of the water is lost. This intensive extraction has been linked to declining groundwater levels and damage to fragile wetland ecosystems on which Indigenous Atacameño communities depend. For thousands of years, these Lickanantay People have



Danone, with Volvic, and Nestlé, with S.Pellegrino: their brands dominate a rapidly expanding global market that commodifies water

WHERE EVERY DROP MATTERS

Share of the population with at least basic access to drinking water, 2024, in per cent



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farmed and reared livestock, drawing on generations of deep ecological knowledge to grow food in a very dry and harsh climate. With less water available, the foundation of their traditional way of life is at high risk. In December 2024, the Environmental Court of Antofagasta imposed a record fine of 47 million US dollars on Australian mining firm BHP, the US-based Albemarle, and Chilean firm Zaldívar for exceeding groundwater extraction limits, ruling that their activities lowered the water table, in some places between 25 centimetres and 2 metres. While several mining corporations are now investing in large-scale desalination plants to replace groundwater with seawater, critics argue that this shift does not fully reverse existing aquifer depletion and even creates new environmental pressures along the coast.

In Harare, Zimbabwe's capital, households already spend up to 20 per cent of their income on unsafe water that is delivered only every three to four days. Despite these conditions, the city is moving toward privatising its water system. In January 2025, the government invited private corporations to submit bids, even though the water supply comes from Lake Chivero, one of the most polluted lakes in the world. The city currently spends between 2.5 million US dollars and 3 million US dollars per month on water treatment, costs that are likely to be passed on to consumers.

These conflicts over water use illustrate a fundamental question for the future: how much water will

In 2024, 2.2 billion people worldwide lacked access to safe drinking water, 3.4 billion to sanitation, and 1.7 billion to handwashing facilities

remain available? And who will be entitled to use it, under what conditions, when it becomes scarce?

Around the world, initiatives such as Right2Water are campaigning for water to no longer be treated as a commodity. They call for its protection as a public good that must be available to all people in sufficient quantities and at an affordable price. A fair water policy in this sense requires clear political action. First, lawmakers must enshrine the right to water with the same weight as other fundamental freedoms – anchored in the EU Charter of Fundamental Rights and in national constitutions. Second, governments must treat citizens as rights-holders, not consumers. That means banning and reversing the privatisation of water resources, returning water services to public control, and introducing social tariffs to ensure water remains affordable for every household. Third, regulators must hold corporations to account. Firms should be required to disclose their full water footprint: how much they extract, and the quality of the wastewater they discharge. They must bear the full cost of any damage they cause. Only robust, consistently enforced regulation will safeguard the natural water cycle over the long term. ●

EXPORTS DESPITE A BAN

Agrochemical corporations export pesticides that are banned in the European Union to countries where safeguards for health and the environment are weak. For BASF, Bayer, Syngenta and others, this is a lucrative business. For many people in the Global South, the consequences are severe.

Pesticides are traded across the globe. Regulation, however, often stops at national borders: rules on approval, sale, and use, as well as maximum residue limits, vary widely. Corporations repeatedly take advantage of different safety standards and legal loopholes to sustain a multi-billion-euro industry.

One loophole in EU pesticide law is that it regulates which pesticides can be sold and used within the EU, but not which pesticides can be produced or exported. Instead of closing gaps, the European Commission is currently trying to weaken EU pesticide regulation at the expense of existing safety standards. Since 2009, pesticides sold in the EU have undergone obligatory regular risk assessment. Certain substances that are particularly hazardous or proven to potentially harm foetuses, cause cancer or severely contaminate waterways are no longer permitted for use on EU farm-

land. But they do not disappear from circulation. Even when pesticides are not approved in the EU or withdrawn from its market, corporations may still manufacture them in Europe and sell them elsewhere. In 2024, the EU authorised the export of 122,000 tonnes of 75 different pesticide active ingredients deemed too harmful for use under EU law. Between 2018 and 2024, exports of EU-banned pesticides more than doubled. Like a boomerang, many of these highly hazardous chemicals return to European plates as residues on imported food.

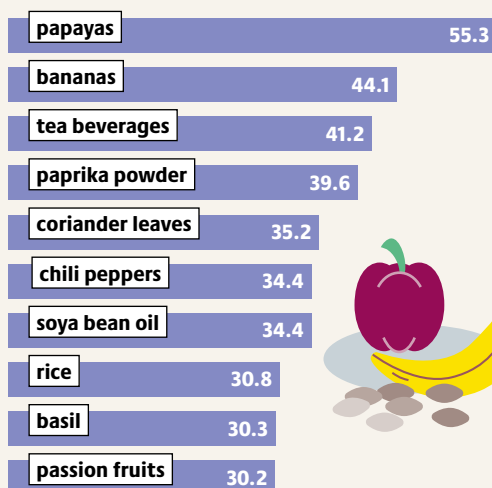
The United Nations has warned that, in many countries of the Global South, pesticides can pose even greater risks to workers, consumers, and the environment than they would in the EU. In many cases, the legal framework governing pesticide use remains inadequate: maximum residue limits are weak, inconsistently enforced, or absent altogether. Public authorities often provide little reliable information about the risks posed by active ingredients. Farmers and workers receive little or no training and frequently even lack the protective equipment that regulations require. In some cases, hazardous substances are repackaged before sale, relabelled, or supplied with warnings only in a language that users barely understand.

The largest exporters in the EU are BASF, Teleos, Agria, Corteva, Syngenta, and Bayer. In 2024, BASF alone shipped more than 30,000 tonnes of banned substances abroad, followed by Teleos with around 11,000 tonnes. The shipments went, among other countries, to Ukraine, Russia, South Africa, Brazil, Colombia, Chile, the United States, Mexico, and Peru.

While France and Belgium have introduced national export bans for EU-banned pesticides, Germany and others remain inactive. Commitments by the European Commission to stop these exports remain unfulfilled. The largest share of banned pesticides from the EU exported globally originates from Germany, where major manufacturers are based. Bayer exports the insecticide cyfluthrin, acutely toxic even at low doses. BASF exports epoxiconazole, a fungicide linked to impaired fertility. Alzchem exports cyanamide, a growth regulator suspected of causing cancer. The EU withdrew approval for cyanamide as early as 2008, after users in Italy suffered poisoning. The EU authority's assess-

PESTICIDE BOOMERANG

Share of samples from products imported into the EU containing traces of pesticides banned in the EU in 2023, in per cent

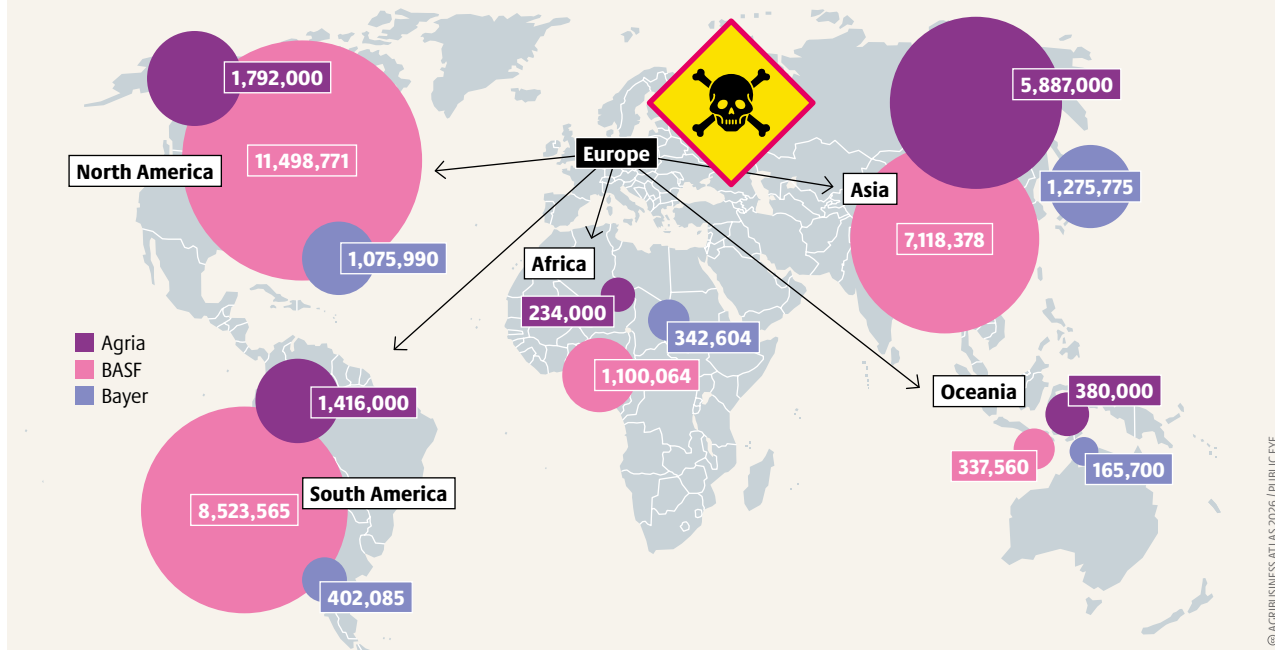


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Nearly one in ten food samples in the European Union contains banned pesticides. Several of these substances are suspected of causing cancer or infertility

TOXIC EXPORTS FROM THE HEART OF EUROPE

Approved shipments of EU-banned pesticides by the three largest European exporters in 2024, in kilograms



ment left no room for doubt: even with full personal protective equipment, exposure levels for users exceeded the legally permitted limit by over 60 times. Since Alzchem is no longer allowed to sell cyanamide for plant protection purposes on the European market, sales have shifted to countries such as South Africa. There, in particular, women working in fruit and wine production are exposed to the pesticide without adequate protection.

Alzchem is not only flouting basic ethical principles but is also acting in breach of the United Nations' guiding principles on business and human rights, which require corporations to prevent or mitigate human rights violations that can be traced back to their products. Although Alzchem officially commits itself to these principles, the corporation continues to export cyanamide-containing Dormex, unhindered, to countries with weak systems of protection.

For many years, civil society organisations around the world have been campaigning to ban highly hazardous pesticides. Their efforts drive a shift in thinking in many countries: Kenya, South Africa, and Nigeria have announced measures to tackle highly hazardous pesticides. In Kenya, for example, the government withdrew approval for a number of highly hazardous active ingredients in 2024. In June 2025, it announced plans to remove a further 77 pesticides from the market.

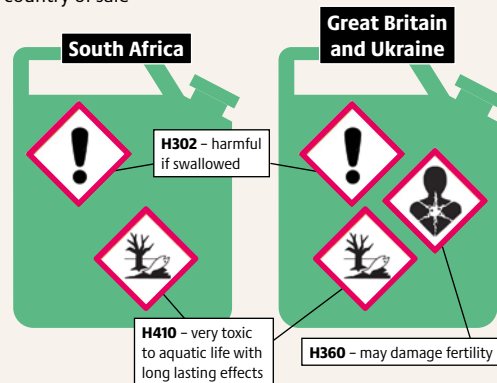
Human rights organisations accuse corporations of treating the environment and public health in the Global South as less worthy of protection

Around 60 per cent of the 122,000 tonnes of pesticides banned in Europe that were exported from the EU in 2024 went to low-income countries

Many corporations respond by pushing back. They apply for exemptions, legally challenge planned bans, or seek to influence the hazard classification of their active ingredients. The industry has shown itself willing to systematically pursue its interests at the expense of health and environmental protection; especially in the Global South, where workers and ecosystems are particularly vulnerable. This makes an EU-wide ban on exporting substances already prohibited within the EU all the more urgent. ●

SAME PRODUCT, DIFFERENT LABELS

Warning labels on the packaging of BASF's Orvego pesticide, by country of sale



PLANTS UNDER COPYRIGHT CONTROL

Seeds form the foundation of our food supply. Yet they are increasingly controlled by a small number of multinational corporations. New genetic engineering techniques are accelerating this trend. Together, these developments are eroding biological diversity and pushing farmers around the world into ever greater dependence.

Seeds are both the origin of all agricultural crop production and its outcome. Some of the harvested grains are used for food – milled into flour and baked into bread – while others are kept for sowing the next season's harvest. Over countless generations, farmers and plant breeders have improved yields and crop quality through continuous selection, creating a diversity of plants adapted to specific climates and soils.

In theory, farmers would not need to buy seed at all, as it reproduces itself. This creates a fundamental challenge for corporations seeking to commercialise the development of new plant varieties. Through targeted

lobbying, however, they have succeeded in establishing a business model that generates billions in annual revenue. Today, just three corporations control 56 per cent of the global seed market – a share that continues to rise. As market concentration increases, farmers and small-scale breeders are becoming ever more dependent on a handful of corporations that use patents to decide which plants may be grown – and under what conditions. The result is not only reduced crop diversity in our food supply, but a significant overall decline in biological diversity.

To maintain control, corporations rely on two mechanisms: a biological and a legal barrier to seed reuse. The biological barrier emerged with the development and commercialisation of hybrid seeds in the early 20th century. Because hybrid seed rapidly loses its desirable traits when replanted, farmers must regularly purchase new seed from commercial suppliers. Although seed saving would be biologically possible, it is not economically viable for farmers. This constant need to repurchase seed steadily increases corporate market power.

Since the 1970s, the loosening of merger control in the United States, and later in other countries, has driven further concentration in the commercial seed market. In the 1990s, this trend gained additional momentum with the rise of genetic engineering and the strengthening of patent protection.

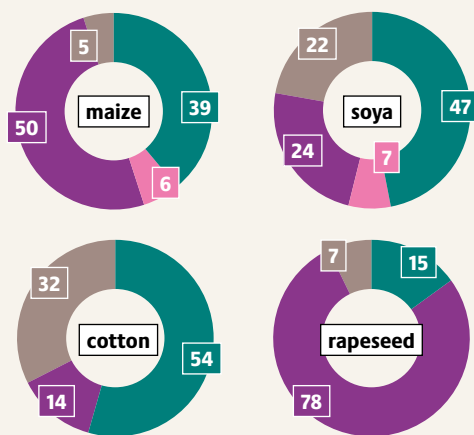
The legal barrier to seed reuse is enforced by corporations through patents. These grant their holders, for a limited period, the exclusive right to control the use and commercial exploitation of an invention. For farmers, this means that cultivating patented plants requires the patent holder's permission. Each year, seed must either be purchased anew, or a licence fee must be paid.

Genetically engineered seed is routinely patented, creating a powerful economic incentive for agribusiness corporations to turn increasingly to genetic engineering. In a market dominated by ever fewer players, competitive pressure is intense, pushing corporations to rely on familiar strategies to keep pace: boosting

CONTROL THROUGH PATENTS

Share of US utility patents granted between 1976 and 2021 for genetically modified plants, in per cent

■ Bayer
■ Syngenta
■ Corteva
■ other

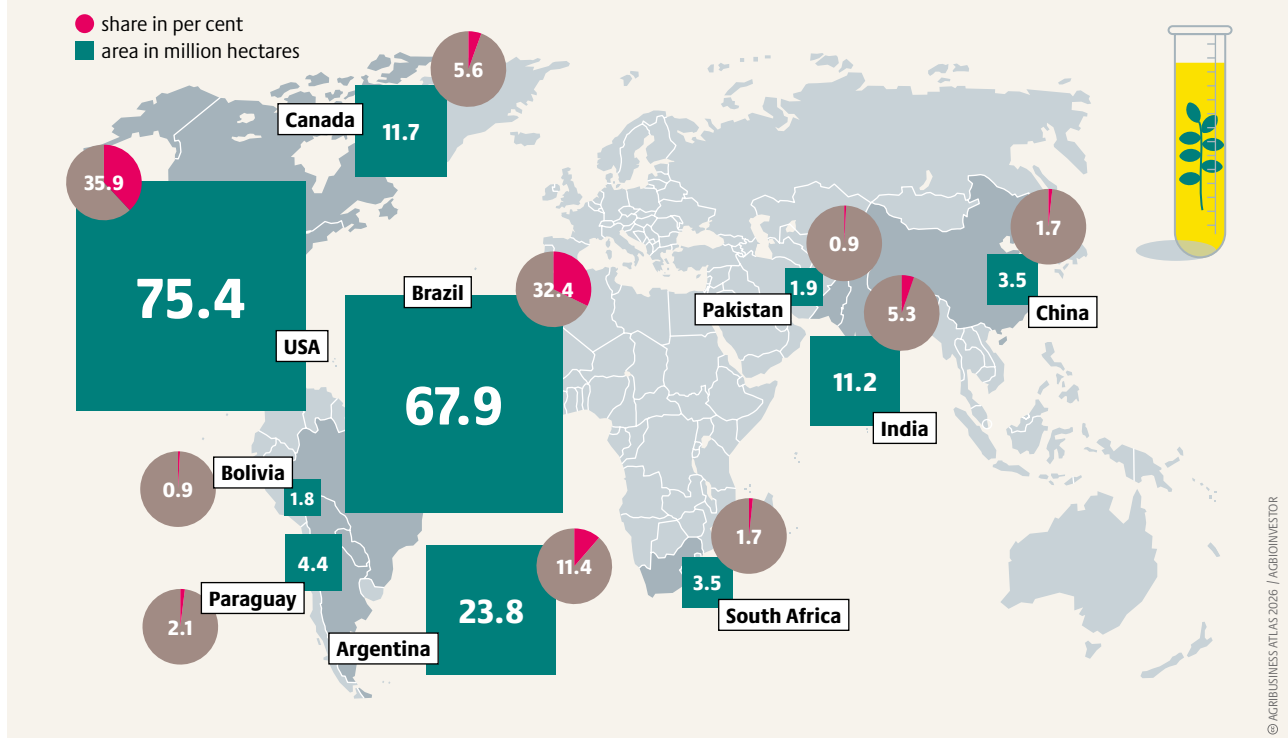


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Bayer and Corteva together hold 80 per cent of patents on genetically modified crops, giving them dominance over both the seed and pesticide markets

FROM THE LABORATORY TO THE LANDSCAPE

Area planted with genetically modified crops and share of global area planted with genetically modified crops, 2024



efficiency through technological innovation and cutting production costs through rationalisation. This dynamic creates increasing pressure for technological conformity. To avoid falling behind their competitors, larger corporations regard technological approaches such as new genetic engineering methods as indispensable.

Corporations are increasingly seeking patents for conventionally bred plants as well. Although this is officially prohibited, the European Patent Office has already granted hundreds of such patents. Together, they cover more than 1,300 plant varieties. Corporations secure these formally impermissible patents by exploiting legal loopholes: applications are worded to present conventionally bred plants as technical inventions. A prominent example is the so-called broccoli case, in which a patent was granted for a broccoli variety with a naturally elevated level of bitter compounds, despite originating from conventional cross-breeding.

This development is being fuelled by new genetic engineering techniques. These encompass a range of molecular genetic methods that enable targeted genetic changes to be introduced at specific sites. Because new genetic engineering techniques frequently do not involve the insertion of foreign DNA, corporations have identified a new loophole. They apply for patents on seed that could be produced using these techniques, even when the same traits could also be achieved through conventional breeding. The fact that

The area planted with genetically modified crops has increased by 30 million hectares over the past decade. Soybeans are grown on half of this area

smaller start-ups can patent NGT plants may accelerate the flood of patents. The new law to deregulate new genetic engineering techniques allows patents on plants and breeding techniques. Farmers will be faced with patented seeds and legal uncertainties. Pre-approval environmental assessments are to be scrapped.

A case in point is KWS, which was granted a patent on maize with enhanced digestibility, even though the relevant gene variants were identified in certain maize plants and introduced into KWS varieties through conventional breeding. The KWS patent applies to the plant type regardless of whether its traits were deliberately created through genetic engineering or occur naturally, thereby giving the corporation control over conventional breeding as well. This patent has already had a negative impact on the work of organic breeders in the Netherlands. Alongside KWS, other dominant corporations such as Bayer, BASF, Corteva, and the Syngenta Group have secured similar patents.

If farmers cultivate varieties patented by KWS or other corporations, they must obtain a licence. For farmers, this poses an existential threat. Concerns include the possibility of legal action when patented seed reaches a field unintentionally, for example through wind drift from neighbouring land. ●

THE POWER BEHIND SOYA

A small number of global players dominate the trade in animal feed, much of which is produced at the expense of rainforests, savannahs, and the rights and livelihoods of Indigenous communities. At the end of these supply chains, soya from corporations such as Cargill ends up in feed troughs on farms across Europe.

Soya has become the world's most sought-after agricultural commodity, generating export revenues of around 80 billion US dollars in 2024. Between 1968 and 2018, the global area under soya cultivation more than quadrupled, while production volumes increased more than eightfold. A key driver of this expansion is the rising demand for animal products: more than 75 per cent of all soya grown worldwide ends up as protein feed for pigs, poultry,

and cattle. Global trade in soya and other feed crops such as maize and wheat is controlled by a handful of dominant corporations: Archer Daniels Midland (ADM), Bunge and Cargill from the United States, COFCO from China, and Louis Dreyfus Company (LDC) from the Netherlands.

This oligopoly is known as the Big Five. It benefits most when prices rise – for example when agricultural markets are shaken by geopolitical crises. During the COVID-19 pandemic and following the start of Russia's full-scale war of aggression against Ukraine, the Big Five achieved record profits. Concentration in the agricultural trading sector is intensifying further. In 2025, Bunge completed a merger with the Canadian corporation Viterra. As early as 2022, the two corporations together controlled more than 20 per cent of soya exports and almost 25 per cent of maize exports from Brazil, a key global market. Competition experts warn that growing market power means lower incomes for producers, higher prices for consumers, and an overall increase in market instability.

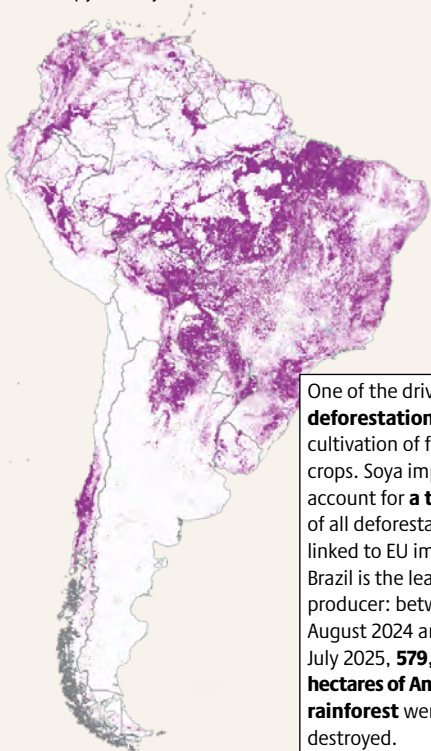
According to studies, fewer than 3 per cent of all soya beans worldwide are produced in line with sustainability standards. Major agricultural traders repeatedly face criticism over deforestation and human rights violations. This applies in particular to Cargill – the largest privately held corporation in the United States, which reported revenues of 160 billion US dollars in 2024. Since 2003, Cargill has operated its own port in Santarém, in the Brazilian state of Pará. From there, the corporation exerts control over the trade in soya from the Brazilian Amazon and the Cerrado savannah. In 2006, the Brazilian government introduced a moratorium aimed at preventing corporations such as Cargill from sourcing soya grown on deforested land in the Amazon. Investigations show, however, that Cargill continued to trade in soya linked to the burning of the Amazon rainforest at least until 2020. In January 2026, the Brazilian Association of Vegetable Oil Industries, including the corporations Bunge and Cargill, announced its withdrawal from the soya moratorium – a dramatic setback for forest protection.

For years, Indigenous communities including the Mundurucu have accused the corporation of disregarding ancestral land rights. One of the most controver-

FEEDING CATTLE, FELLING FORESTS

Tree cover loss in South America between 2001 and 2024

■ loss of trees with more than 30 per cent canopy density



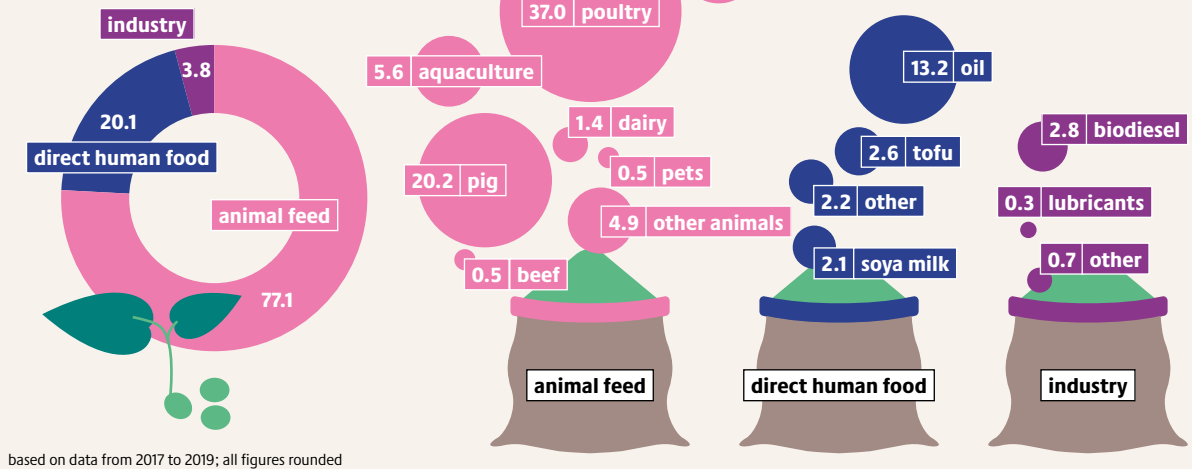
One of the drivers of **deforestation** is the cultivation of feed crops. Soya imports account for **a third** of all deforestation linked to EU imports. Brazil is the leading producer: between August 2024 and July 2025, **579,600 hectares of Amazon rainforest** were destroyed.

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Forests are cleared and people displaced for soya cultivation. In Brazil, fields span an area equal to over a tenth of the EU's total land area

MORE IN THE TROUGH THAN ON THE TABLE

Share of global soybean production accounted for by average annual consumption, by weight in per cent



sial projects is the planned Ferrogrão railway, backed by Cargill and other major corporations. The nearly 1,000-kilometre transport corridor for soya and maize threatens to cut through 16 Indigenous territories and facilitate land grabbing. Investigations have also revealed dire working conditions within Cargill's operations. In 2023, a Brazilian court ordered the corporation to pay compensation after it was proven to have sourced cocoa from plantations where child labour was used.

The market power of large agricultural trading corporations must be curbed. This is necessary to protect Indigenous communities from displacement, farmers and workers from exploitation, consumers from high prices, and the environment from destruction. To achieve this, mergers must first be subjected to rigorous scrutiny, taking their social and environmental impacts into account. Second, effective sanctions are needed when corporations abuse their market power to dictate prices and distort competition. Third, greater transparency is essential: What quantities of commodities do major agricultural traders hold in storage, and where? Access to this information would enable governments to draw on these reserves in times of crisis in order to mitigate food shortages and price shocks. This objective should take precedence over corporate profits and returns for investors.

Greater transparency is also needed along the long journey that soya beans and other feed crops undertake from seed to final consumption. An important

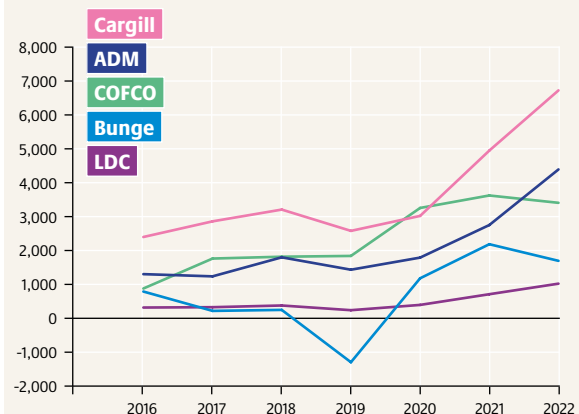
Global trade in agricultural commodities, transport and storage: large corporations control up to 90 per cent of the global market

Soya has been cultivated in Asia for millennia. Globally, production expanded sharply in the 20th century, driven chiefly by livestock farming

step in this direction is the EU's regulation on deforestation-free products. It is intended to ensure that corporations, as well as their suppliers and subcontractors, have not committed human rights violations during production and have not used land on which forests were damaged or cleared after 2020. Finally, policymakers can reduce demand for soya and other feed crops through targeted support programmes. These could help farms keep fewer animals and make greater use of domestically grown protein crops, while also making plant-based diets more attractive to consumers. ●

CRISIS PROFITEERS

Net profits of the world's five largest agricultural trading corporations, in million US-dollars



HOW POWER SHAPES FOOD PRICES

How are food prices determined? How are profits distributed along the supply chain? For consumers, this is often quite hard to discern. Scientific studies consistently show that prices are rarely determined by supply and demand alone. Instead, they are shaped by power relations within the food system.

Prices are rarely set cooperatively between farmers, processors, distributors, restaurants, retailers, and consumers. In many cases, the balance of power lies with food processors or major retailers. Because most products are standardised, they can be sourced from different regions – or even from far-flung continents.

This strengthens the bargaining power of large buyers: standardisation places farmers in direct global competition with one another, despite widely differing production costs, and effectively imposes the lowest bidder's price. The drive among food processors and retailers to maximise profits is a key factor behind this dynamic. Wheat was the first crop to be standardised, in the 1850s, as a tradable commodity on the Chicago Board of Trade. Today, this principle extends to all crops, animal products, and even foods like bottled milk or sliced bread.

A recent French analysis identifies six typical mechanisms of price formation along food value chains,

highlighting the complexity of how prices are set and profits distributed across the food system.

In the first price-formation model identified in the study, differentiated supply chains based on cooperation play a central role. In this model, prices are built from the bottom up, starting with agricultural production and moving through distributors, retailers and restaurants to consumers. It is closely associated with direct sales and short supply chains, as well as quality or origin labels such as organic farming, fair trade, or protected designations of origin like Champagne or Comté cheese. This model accounts for only 5 per cent of the total value of the French food system.

The second model accounts for approximately 3 per cent of total turnover and is more exposed than the first to the pressures of standardisation and price competition. It concerns products with quality or origin labels that are nevertheless sold at low prices as retailers' own-brand products. In this case, farmers are less likely to benefit.

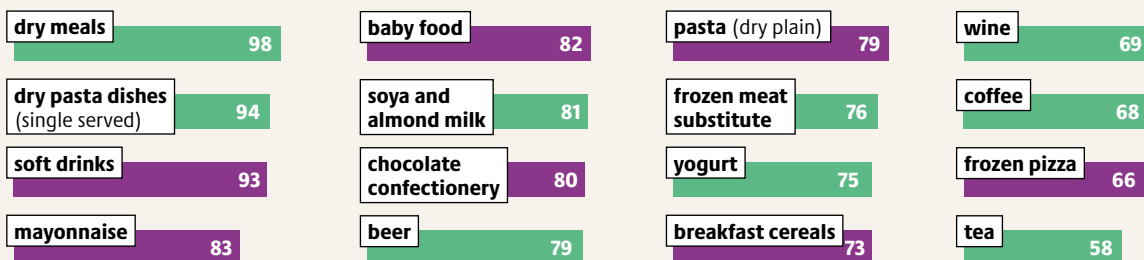
The third pattern is the dominant one, centred on best-selling products from leading food and drink brands such as Nutella, Coca-Cola, KitKat, and Magnum ice cream. Although these brands represent only a very small share of supermarket product ranges, they account for 36 per cent – more than one third – of

Corporations make profits from food at the expense of workers: In the United States, 5 of the 10 lowest-paid occupations are found in the food industry

CORPORATOCRACY

Market share of food products in the United States in 2021, in per cent

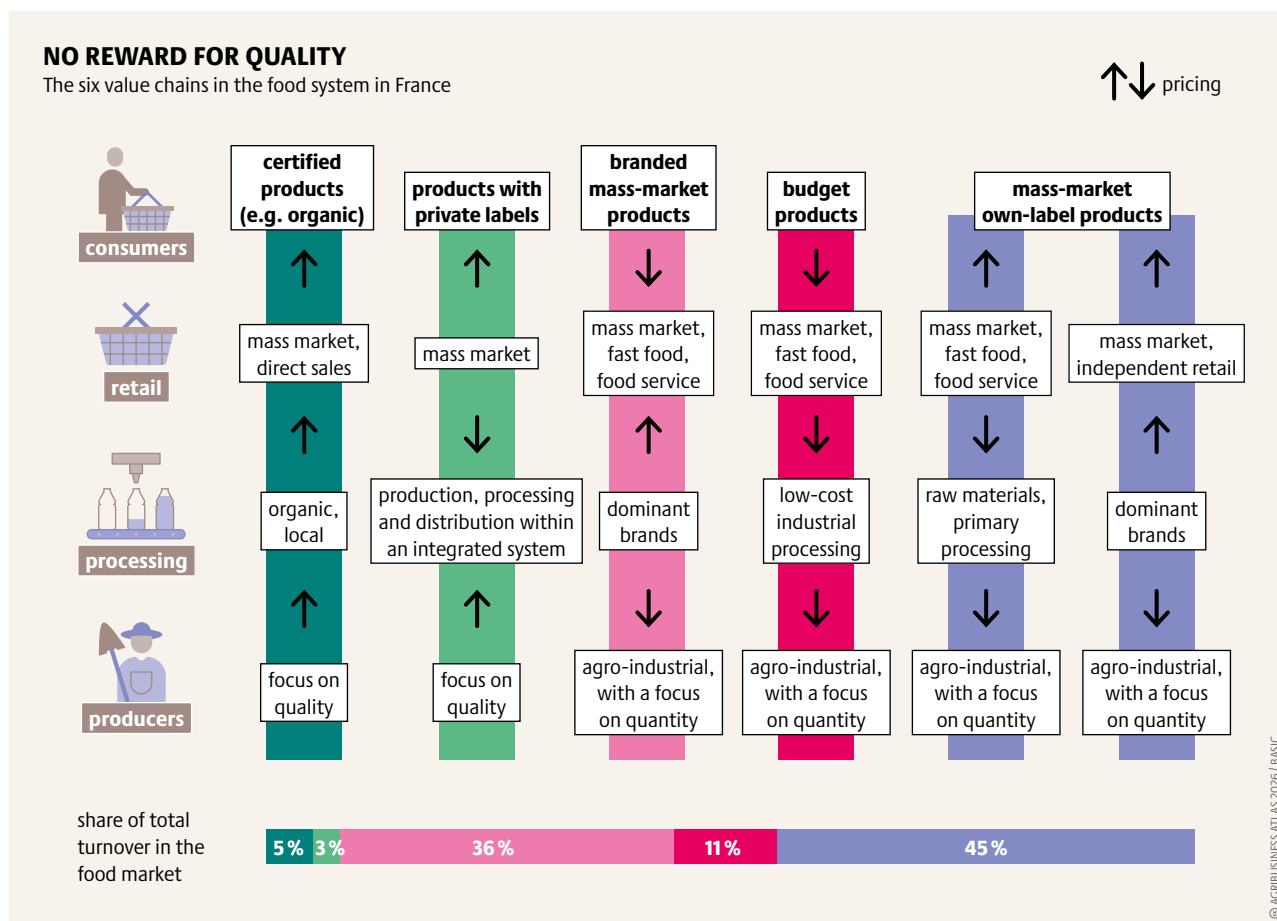
■ the 4 largest corporations ■ the 3 largest corporations



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NO REWARD FOR QUALITY

The six value chains in the food system in France



the total value generated by the French food system. Their success relies on their strong and clear appeal to consumers, maintained by very heavy investment in marketing and advertising. For farmers, there is little advantage, since these products rely not on the distinctive qualities of their ingredients but on a vast supply of standardised agricultural raw materials to sustain large-scale, uniform production. Most of the profits go to the big food processing corporations.

The fourth pattern corresponds to value chains characterised by strong price competition at all stages. It accounts for 11 per cent of the total value generated in the French food system. For consumers, these take the form of so-called loss leaders or ultra-low-priced food offers, such as bananas at 0.80 euros a kilogram or bottled milk at 0.75 euros a litre. In such cases, most actors struggle to cover costs. Large processors and retailers can compensate through their activities in other value chain models, but farmers engaged in standardised commodity production generally cannot.

Finally, the two remaining value chains account for 45 per cent of the total value generated by the French food system. They encompass a wide range of branded and own-label products. What they have in common is the ability of distributors, restaurants and other out-of-home food providers at the end of the chain to sell these products at higher margins, largely unnoticed by

Producers receive just 6.90 euros out of every 100 euros in food sales in France. Thirty years ago, the figure was almost twice as high

consumers. Yet, the food products involved are similar in composition to best-sellers, just less well-known and less in demand. In the middle of the chain, large brands are able to negotiate prices that secure substantial margins, though lower than those of best-sellers, while smaller brands and processors face intense competition. Once again, farmers do not receive higher returns.

The key problem is that the vast majority of these models – accounting for 92 per cent of the French food system, with only the first two as exceptions – fail to reward the distinctive qualities of agricultural raw materials or the work of farmers. Instead, they prioritise volume and economies of scale, creating value through marketing and advertising. This is driven by the pursuit of profitability among food and beverage brands, retailers, and restaurant chains seeking to remain competitive under capitalist market conditions, while agricultural prices and internal costs at each stage of the supply chain remain under constant pressure. Consumers lose out, too: studies show that major supermarket chains rarely pass on cost savings in the form of lower prices and instead often retain the gains themselves. ●

TRANSITION WITH PITFALLS

Our food system is exacting a heavy toll on the climate. Green hydrogen for fertilisers, agrofuels, and carbon farming are all touted as ways to reduce or offset emissions. Yet rather than delivering climate neutrality, these technical fixes often create new problems.

Farmers already feel the full force of the climate crisis through extreme weather events like droughts and floods. At the same time, farming drives that crisis: globally, food systems account for roughly a third of greenhouse gas emissions, including carbon dioxide (CO₂). They also consume around 15 per cent of the world's fossil energy. The current war in the Middle East exposes, once again, the degree to which the agrifood sector remains dependent on fossil fuels – to produce fertilisers and pesticides, to power farm machinery, as well as to process, store, transport, and cook food. In recent years, agricultural and industrial corporations have pushed a range of decarbonisation strategies, promoting measures intended to reduce greenhouse gas emissions. However, many of these approaches carry risks and generate new social and environmental impacts.

Corporations such as Norwegian fertiliser giant Yara and German agrochemical producer BASF promise a green transition while continuing to profit heav-

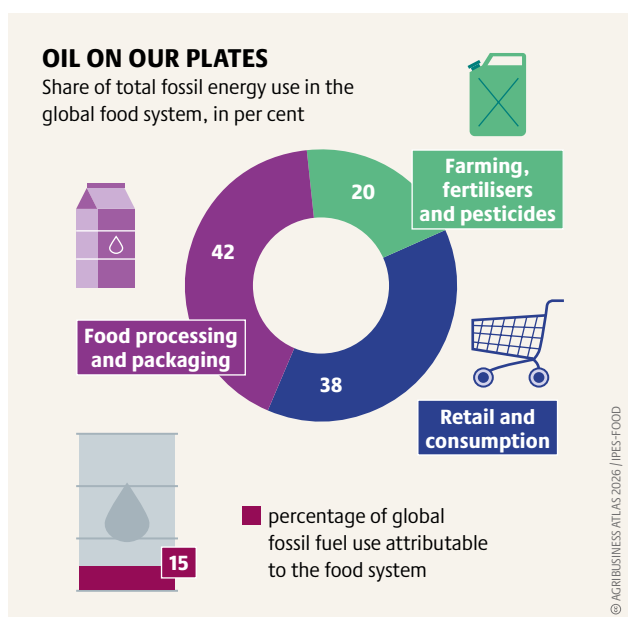
ily from fertiliser and ammonia production. Synthetic nitrogen fertilisers pose a major challenge for climate action: in recent years, their lifecycle emissions – from production through to application – have exceeded those of global aviation. Yara and others have announced that they will switch from fossil-based hydrogen derived from natural gas to green hydrogen, aiming to decarbonise production over the coming decades. In theory, green hydrogen could cut emissions by nearly 40 per cent; the remaining 60 per cent would persist. Once fertiliser is applied, soil microorganisms convert excess nitrogen into nitrous oxide, a greenhouse gas released into the atmosphere. This process occurs regardless of how the fertiliser is produced. Beyond this, the strain on soils and waterways remains a serious concern – even if green hydrogen were deployed at the scale corporations promise.

Another challenge lies in energy supply. Renewable electricity generation within the European Union (EU) falls well short of what would be required. Most green hydrogen would have to be imported from solar- and wind-abundant regions in Africa or South America, creating new dependencies. While corporations in the Global North reduce their reliance on fossil fuels, resource extraction in the Global South continues, fishing communities lose access to water, and pastoralists are pushed off their land.

Countries like Germany are vigorously promoting this agenda. Through its hydrogen diplomacy, the government forges energy partnerships with countries such as Colombia and Kenya. European climate funds and export credit guarantees are being deployed to sweeten the commercial case for hydrogen trade. The main beneficiaries are large agribusiness and industrial corporations.

Other sectors also pursue decarbonisation by drawing on agriculture. In transport – a sector with persistent emissions – agrofuels are meant to reduce the carbon footprint. Yet growing energy crops demand vast tracts of additional farmland and often relies on monocultures. This fuels land conflicts worldwide and frequently displaces food production.

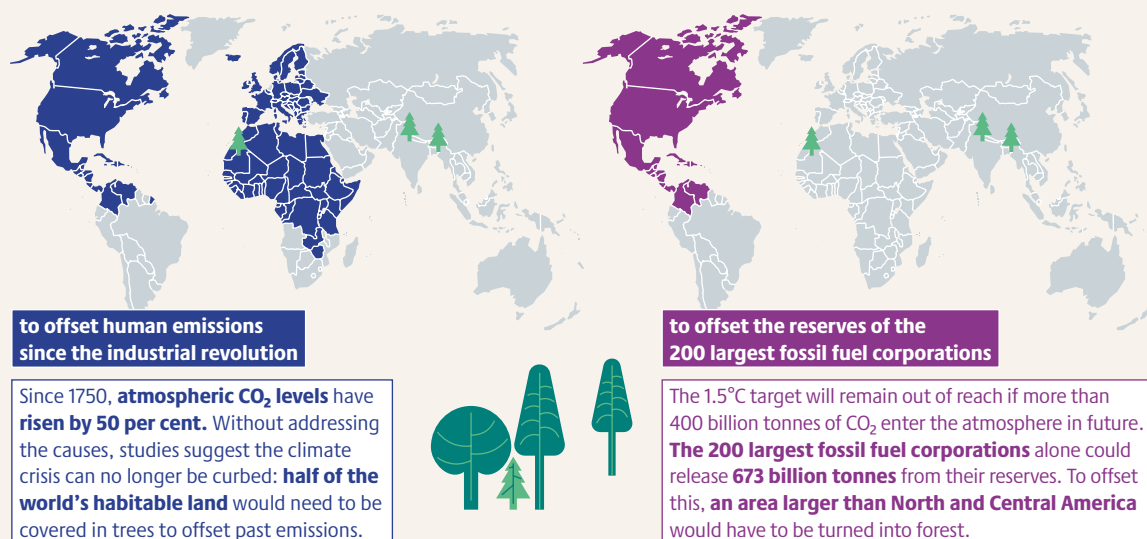
Agrofuels used in the EU already require nearly 10 million hectares, the equivalent of 10 per cent of the EU's arable land. The current fossil fuel energy crisis



Air pollution and climate damage: fossil fuel use in the food system and beyond resulted in 4.5 trillion US dollars in associated costs in 2022

ALL OF THIS WOULD HAVE TO BE TURNED INTO FOREST

Land requirements for reforestation projects aimed at offsetting greenhouse gas emissions



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is bringing agrofuels back onto the agenda, allegedly as a more affordable alternative to imported fossil fuels. Several countries in Asia, including Vietnam and Indonesia, have increased their use of agrofuels since the beginning of the US–Israel war against Iran. But agrofuels come with their own dependencies: they rely on industrial monoculture farming and, in the EU, advanced agrofuels cost 79 per cent more than charging an electric vehicle.

A model called carbon farming has also gained traction in recent years. Under this model, farmers and landowners are expected to modify their land-use practices to sequester carbon in soils or through tree plantations, then sell the stored carbon as carbon credits. Major corporations such as Unilever can buy their way out of addressing their emissions without making their production truly sustainable. Carbon credit schemes are frequently linked to reports of human rights abuses and land grabbing. In Tanzania, for example, the German car manufacturer Volkswagen is developing a carbon farming project that many members of the Indigenous Maasai community oppose, arguing that it severely restricts their traditional grazing practices. The contested area spans nearly one million hectares – larger than the entire island of Cyprus. Volkswagen aims to use carbon credits to shrink its carbon footprint. At its peak, the corporation and the cars it sells emitted more greenhouse gases annually than Australia.

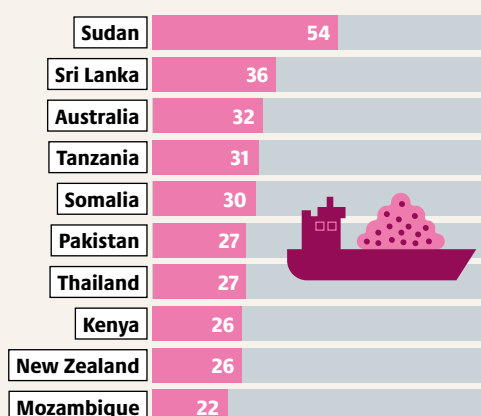
Reliance on imported fertilisers is pushing poorer countries into crisis as US–Iran tensions disrupt exports, driving up prices and threatening harvests

Rather than change business models, companies promote reforestation to offset emissions. The land required makes it impossible to succeed

The conclusion is clear: at a moment when war, energy shocks, and rising food prices are exposing the fragility of industrial agriculture, the response cannot be more of the same. When climate action relies primarily on technical fixes, it risks deepening dependence on large agribusinesses and costly technologies accessible only to large-scale industrial farms. Genuine decarbonisation in agriculture demands a fundamental transformation of our food system – one that puts the climate, ecosystems, and social justice first. ●

DEPENDENCE AT A COST

Fertiliser imports shipped by sea from the Persian Gulf region in 2024, in per cent



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BIG TECH TILLS THE LAND

GPS sensors, cloud-based systems and artificial intelligence are fundamentally reshaping agriculture. A small number of corporations control the market and are pushing farms into ever greater dependence.

Large agribusiness corporations are purchasing digital technologies or developing them in-house. In practical terms, this development, commonly referred to as Agriculture 4.0, means that tractors and combine harvesters can partially steer themselves using sensors and GPS, while automatically recording the quantities of pesticides and fertilisers applied and the yields across different sections of a field.

Cloud-based platforms play an increasingly important role in this transformation. When Bayer acquired Monsanto in 2018, it also gained control of the digital platform Climate FieldView. Farmers around the world now use it across a total area of 90 million hectares. In the EU, between 3 and 23 per cent of surveyed farmers use digital tools that go beyond WhatsApp or weather forecasts. Other major

agribusiness corporations offer similar services, including BASF with xarvio, Corteva with Granular Insights, John Deere with Operations Center, Syngenta with Cropwise, and Yara with its platform YaraPlus. All these platforms collect data from farms and farm machinery and combine it with publicly available weather and satellite information, for example relating to crop growth. Corporations claim that this will offer farmers a clearer overview of their operations and support decision-making.

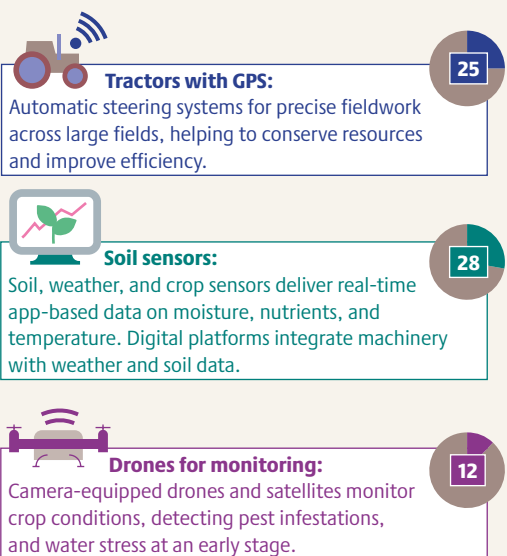
Many platforms also provide personalised recommendations. Climate FieldView, for example, shows how Bayer's DEKALB maize seeds can be sown to maximise yields. To do this, the platform uses machine learning, a form of artificial intelligence (AI) that identifies patterns in large datasets, derives insights, and generates forecasts. Depending on a farm's yield targets, the platform suggests, for instance, in which zones seeds should be sown more densely, and when irrigation and harvesting should take place.

At first glance, this may appear to represent progress for farmers. In reality, however, digital agriculture primarily serves the profit motives of agribusiness corporations. As some of their revenues are declining, for example in the pesticides business, digital services and data analysis are becoming increasingly important sources of profit. By digitising agriculture, these corporations gain access to the data of millions of farmers. This allows them to develop products more strategically, market them more precisely, and potentially adjust prices accordingly. For farmers, the platforms create new dependencies. Agricultural knowledge is increasingly replaced by data-driven analysis, and algorithms play an ever greater role in decision-making. Because many platforms actively promote their own products – Climate FieldView, for example, promotes Bayer's seeds – switching to alternative inputs becomes increasingly difficult. And once data have been uploaded to a platform, they usually cannot be transferred to another platform. This is commonly described as a lock-in effect, whereby users become effectively tied to a particular product with no viable alternatives.

Well-capitalised tech corporations have also moved into agriculture. Since 2024, for example, John

AGRICULTURE WITH INTERNET ACCESS

Current or planned use of Digital Farming in the European Union, percentage of all farms, 2024

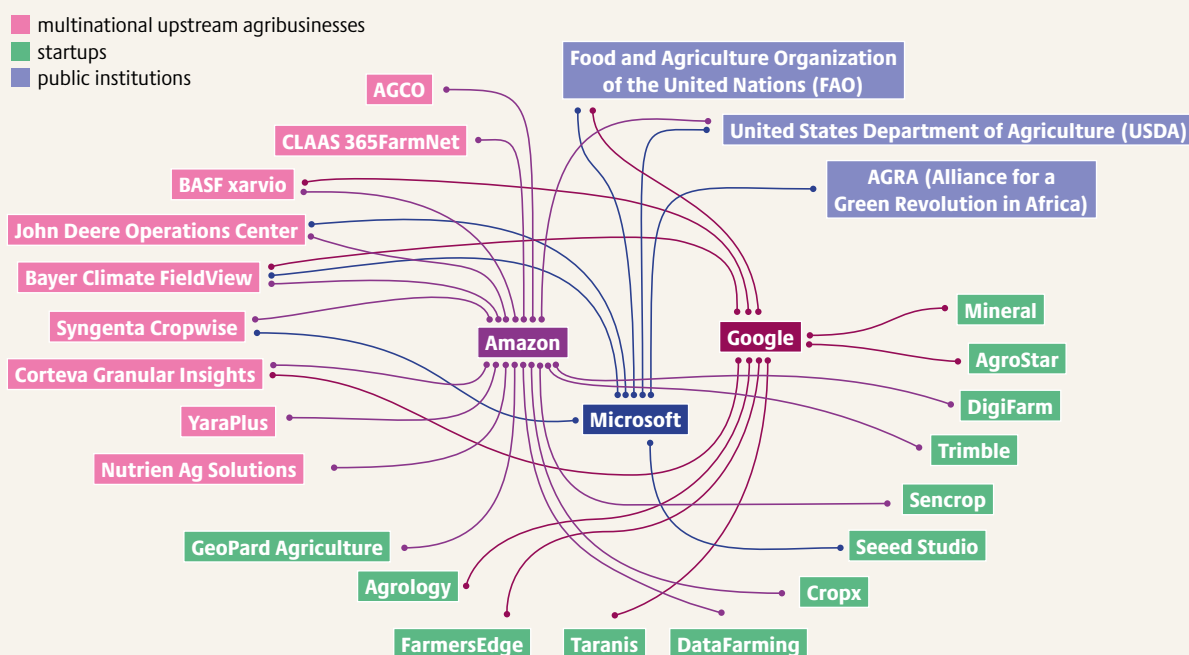


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Digital farming connects fields and farms by collecting, analysing, and integrating large volumes of data across multiple areas

SPIDERS IN THE WEB

Economic relationships between agricultural and tech corporations, 2024



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Deere has been working with Elon Musk to connect farm machinery to Starlink's satellite network. The aim is to reach rural areas where access to high-speed internet remains limited. Chinese tech giants Alibaba and Tencent have adapted their AI-based chatbots specifically for farmers. These chatbots now provide tailored recommendations to optimise cultivation. Big Tech corporations also supply much of the infrastructure required for the digitalisation of agriculture: many platforms rely on cloud computing and data analysis services provided by Amazon, Microsoft, and Google.

Microsoft is also expanding its presence in the agricultural sector through a cooperation with Bayer. The Azure Data Manager for Agriculture is based on Microsoft's cloud infrastructure. By using data generated by millions of users, Microsoft and Bayer could further expand their market power. The risks are evident: the more dominant a platform becomes, the easier it is for the corporation to exclude other market participants and generate new revenue by charging for access. At the same time, users' dependence on the platform would increase further.

This form of market dominance has become a core strategy for profit generation in platform capitalism –

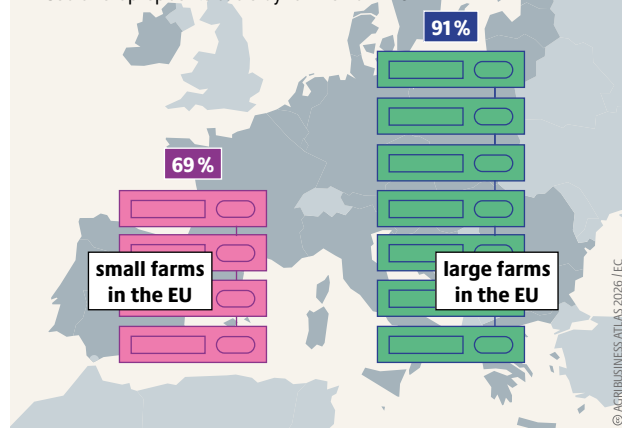
Technology use ranges from weather forecasts to drones, but adoption of advanced technologies by small farms remains below 2 per cent

Tech giants now operate across most of the agricultural sector. The data they collect strengthens their algorithms and further consolidates market power

an economic model in which a small number of actors control key interfaces and are thus able to reshape markets in line with their own interests. Well-known examples include Amazon in online retail and Meta, which dominates social networking through Facebook and Instagram. The socioeconomic effects already observed in these and other sectors now threaten to extend to agriculture. ●

TECHNOLOGY ADOPTION ACROSS FARMS IN THE EU

Use of crop-specific tools by farm size in 2024



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SOWING INFLUENCE IN GLOBAL MARKETS

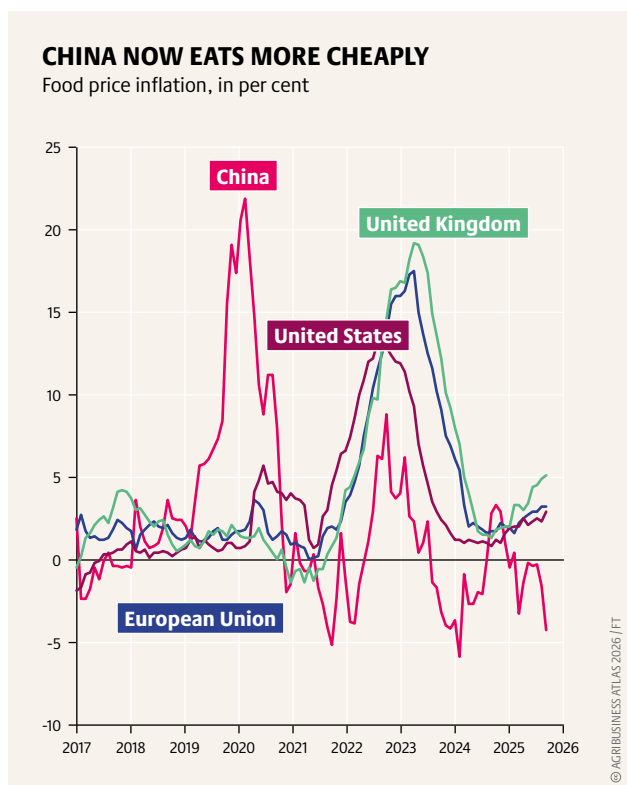
During the 20th century, food systems globally were largely dominated by US multinational corporations and, to a lesser extent, European ones. In recent decades, this landscape has shifted, as Chinese corporations have steadily expanded their influence in agricultural trade and the agrochemical sector. Since many of these corporations are state-owned, their rise reflects not only market dynamics but also a deliberate government strategy.

Throughout China's history, hunger has often sparked unrest: famines and food insecurity have repeatedly preceded rebellion and conflict, often exacerbating underlying socioeconomic instability. Coupled with factors such as military overreach and corruption, food crises often marked the onset of dynastic collapse. This pattern was evident during the

final decades of the Qing Dynasty, China's last imperial government. It experienced a series of major famines with significant consequences between 1810 and 1907. For instance, the famine between 1876 and 1879 alone claimed more than 9.5 million lives. In more recent history, the famine from 1959 to 1961 led to the deaths of tens of millions. It was precipitated by the policies of Mao Zedong, who sought rapid industrialisation and increased agricultural production through his so-called Great Leap Forward. Against this backdrop, the Chinese central authorities have long come to view a stable and sufficient food supply as a foundational pillar of state legitimacy.

Since a significant policy shift in 2013, China has pursued a dual-track approach to food security. At home, the government seeks to maintain self-sufficiency in key staples like rice, wheat, and pork, investing in agricultural technologies such as autonomous systems and artificial intelligence. Internationally, China relies on global markets for non-staples such as soybeans, diversifies its sources, and deepens ties with Africa, Latin America, and Southeast Asia through long-term supply agreements and overseas investments. As part of this strategy, Chinese state-owned enterprises (SOEs) often serve as instruments of Beijing's strategic influence. The government also brings private firms into this effort, providing them with low-interest loans and diplomatic backing.

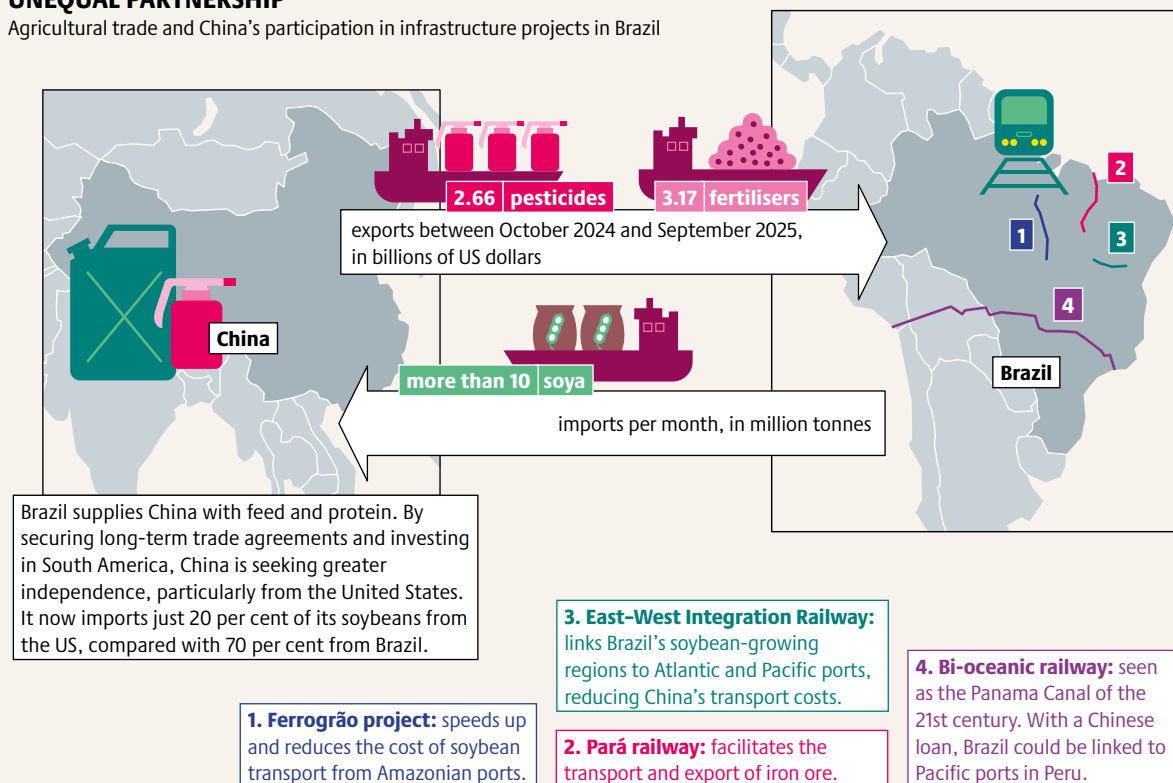
China's expansion of its agribusiness abroad is also driven by declining domestic food self-sufficiency, which has fallen from 93.6 per cent in 2000 to just 65.8 per cent in 2020. By the end of 2025, China could face a food gap of around 130 million tonnes, including a grain deficit of approximately 25 million tonnes. By 2030, estimates suggest that the country's food self-sufficiency rate may further drop below 59 per cent. Externally, China's food security efforts are being shaped by global volatility. Tensions with the United States, disrupted global grain and fertiliser markets as a result of Russia's full-scale invasion of Ukraine, and a surge in food protectionism – in other words, countries restricting exports in response to



In 2019, African swine fever in China led to a temporary spike in food prices. Inflation has since fallen below levels seen elsewhere

UNEQUAL PARTNERSHIP

Agricultural trade and China's participation in infrastructure projects in Brazil



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global shocks – have all made it harder for Beijing to diversify its food imports.

An examination of key actors highlights the growing scale of China's influence in the global agricultural sector. COFCO Group, a state-owned grain and logistics giant, handled over 108 million tonnes of grain and other agricultural commodities in 2024. Based on its 2022 revenues, COFCO is the second-largest agricultural trader after Cargill. With its 43 billion US dollars acquisition of Syngenta in 2017, ChemChina has provided China with access to advanced seed and agrochemical technologies, strengthening control over global agricultural inputs. Today, the Syngenta Group – including ADAMA from Israel – is the world's largest pesticide and seed corporation with a global market share of 10 per cent in seeds and 25 per cent in pesticides in 2023.

China's agricultural investments are concentrated in regions with both strategic and commercial value. In Africa, Chinese firms, often in collaboration with state-backed initiatives like agricultural demonstration centres, support the distribution of seeds and fertilisers to enhance agricultural productivity. These initiatives are underpinned by intergovernmental frameworks such as the Forum on China-Africa Cooperation (FOCAC). Between 2013 and 2023, China established 24 agricultural technology demonstration centres across Africa, bringing Chinese experts together with local farmers, and introduced more than 300 advanced farming tech-

China seeks self-sufficiency but cannot produce everything. As the world's largest soybean importer, it imported over 105 million tonnes in 2024

nologies. These efforts have led to an average yield increase of 30 to 60 per cent and have benefited over one million farmers across the continent.

In Latin America, especially Brazil and Argentina, China secures key imports such as soybeans and beef, while investing in infrastructure, including ports, hydropower dams, and railways. In Southeast Asia, geographical proximity and rising demand have enabled ventures such as COFCO Biochemical's operations in Thailand.

China's ambitions in global food governance are increasingly visible, particularly through its growing influence in the United Nations Food and Agriculture Organization (FAO). Since Qu Dongyu became Director-General in 2019, as the first Chinese national to hold the position, China appears to have gained greater prominence in shaping international agricultural agendas. For example, Syngenta has benefited from FAO approval of several of its highly hazardous pesticides for use in development projects.

Although FAO's enforcement powers are limited, it still provides China with a valuable platform to promote its agricultural standards and development vision. ●

A RISKY MARKET APPROACH

The European Union (EU) is stepping up efforts to draw in private investment to meet its biodiversity and climate goals. This risks speculation, prioritises profitable projects over vital habitats, and reduces nature to tradable commodities.

Over the last few years, a key pillar of the EU's environmental policy has been to channel financial flows into sustainable activities. This reasoning underpinned the launch of the EU Green Deal and lately the concept of nature credits: tradable units of biodiversity generated through restoration or conservation projects – such as restoring wetlands or planting trees – which corporations can purchase to claim positive action on biodiversity.

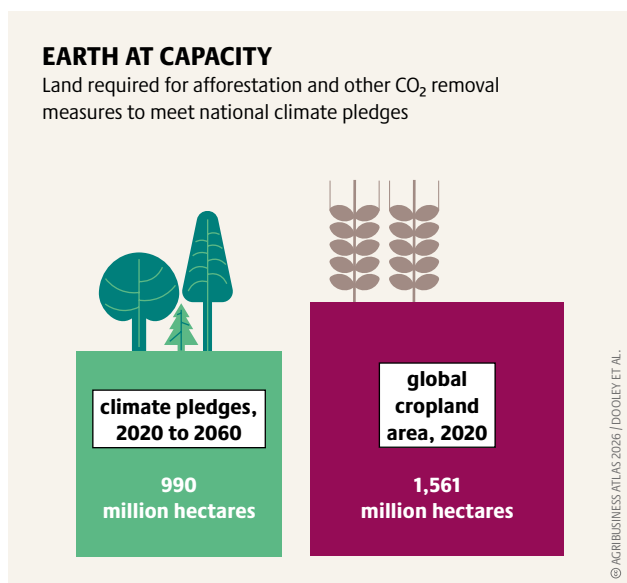
Proponents of market-based solutions argue that such approaches can complement existing public budgets for nature and climate protection. However, this claim is highly questionable; nature credits even carry the risk of making the situation worse. First, treating nature as a financial asset undermines its intrinsic value and the unique qualities of ecosystems, which are non-interchangeable and irreplaceable. Placing a monetary value on ecosystems for their ability to store carbon, retain water, or mitigate extreme weather events introduces a market logic, reducing biodiversity to a handful of tradable functions, rather than recognising the full complexity of natural

systems. This profit-driven approach allows corporations to claim positive contributions to biodiversity while simultaneously destroying habitats elsewhere through their commercial operations.

Second, creating a new class of financial assets through commodification of nature carries serious risks for land use. The International Advisory Panel on Biodiversity Credits, established by the UK and French governments to promote the integration of biodiversity credits into laws worldwide, has not ruled out secondary market trading, which would allow biodiversity credits to be resold multiple times to profit from price fluctuations. This suggestion is likely to be incorporated into the future EU framework for nature credits. This could introduce a speculative element and greater volatility in these instruments, which in turn is likely to drive up land prices and create uncertainty for biodiversity restoration projects. In the Global South, for example, nature credit projects can result in smallholder farmers, Indigenous Peoples, or local communities losing access to land or natural resources, as corporations purchase the areas for financially lucrative conservation or offsetting initiatives.

The discussion about nature credits feeds into a narrative that frames the main cause of biodiversity loss as a lack of financing, rather than our current industrial practices, with agribusiness being a major driver of ecological degradation. This narrative diverts attention from the real drivers of today's ecological crisis and allows industries to maintain the status quo and continue with business as usual. No matter how much private or public money is spent on restoration, biodiversity loss cannot be reversed unless we rethink our agricultural system. A more biodiversity-friendly food production would require a drastic reduction of pesticide use, more diversity of crops, and the integration of trees and hedges. Legislative efforts must focus on reducing pollution activities and pesticide use, and halting habitat fragmentation and the conversion of natural, agricultural, or forestry land for infrastructure or urban expansion.

Instead of privatising nature restoration, ecosystem restoration and conservation should be treated as public goods. They require long-term planning, a stable and predictable regulatory framework, and in-

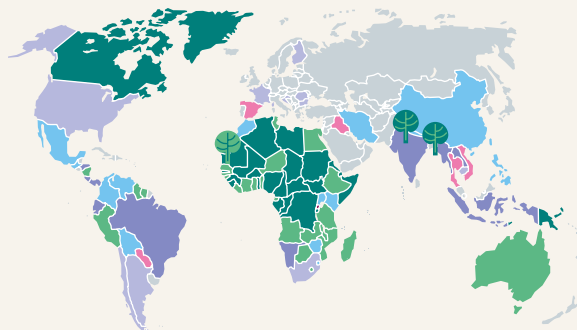


To sustain fossil fuel use, governments pledge to plant vast numbers of trees, yet the land required for this is simply not available

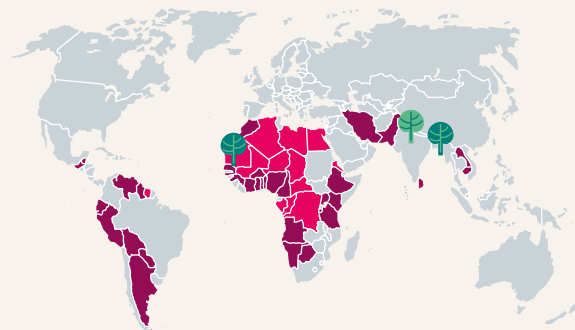
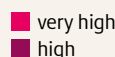
IN THE CROSSHAIRS OF INVESTORS

Indigenous land and its exposure to land grabbing, 2023

share of land managed by Indigenous Peoples, and communities, in per cent



risk of land acquisition



number of afforestation projects for CO₂ offsetting



Afforestation projects intended to offset CO₂ emissions often lead to monocultures, land conflicts, and biodiversity loss in the Global South, rather than climate justice.

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clusive governance. The EU should not abandon its responsibility for protecting ecosystems to private markets, nor transfer environmental decision-making to market forces, which will inevitably prioritise short-term profits over long-term ecological integrity.

The EU could strengthen public financing through dedicated environmental taxes, levies on polluting industries, such as the agrochemical industry, and the redirection of environmentally harmful subsidies. Such funding streams would represent an equivalent cost for corporations, but would keep decision-making in the public sphere, where democratic oversight is possible and ecological priorities can be set based on science rather than financial returns. While seeking funds for restoration is important, the primary focus should be on strong, binding regulations and their enforcement to ensure that corporations actually reduce their environmental impact. This approach would help prevent initial habitat destruction, reducing the need for later restoration. Beyond traditional fiscal tools, innovative governance models such as citizens' assemblies could be used to deliberate on restoration priorities and funding sources, ensuring

The production and distribution of our food drive biodiversity loss, with agribusiness alone threatening 86 per cent of endangered species worldwide

Around 80 per cent of global animal and plant species live in Indigenous territories, many threatened by land grabbing and the climate crisis

that projects reflect the public interest. In this way, biodiversity restoration can be pursued not as a speculative asset class, but as a shared societal commitment, grounded in democratic legitimacy and ecological responsibility. ●

NATURE UNDER PRESSURE

Number of species threatened with extinction, by human activity

habitat loss direct mortality other

food system 15,376 6,398 3,598

fire, water management 7,087 2,640 1,986

climate crisis 3,337 1,542 1,723

energy, mining 3,632 1,141 987

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FRAGMENTED GOVERNANCE AND CORPORATE POWER

The world faces rising hunger and ecological breakdown, driven by industrialised food systems. Yet no institution effectively guides global policymaking. Responsibility is split among competing agencies with overlapping mandates, rival funding, and weak oversight. The fragmentation of United Nations (UN) food agencies is a political choice that corporations exploit to reshape institutions for commercial interests.

When the Food and Agriculture Organization (FAO) was founded in 1945, it held a sweeping mandate: directing global food security research, financing, emergency relief, and policy under a single roof. But the food and energy crises of the 1970s dismantled that authority. Agricultural finance was handed to the newly created International Fund for Agricultural Development (IFAD), while the World Food Programme (WFP), previously the FAO's emergency relief arm, became an independent agency heavily influenced by the United States. The Consultative Group for International Agricultural Research (CGIAR), the global agricultural research network, was set up outside the

UN system – created by the World Bank and private foundations, with no mandate from Member States. Each new agency developed its own bureaucracy, complete with legal departments, communications teams, and fundraising operations.

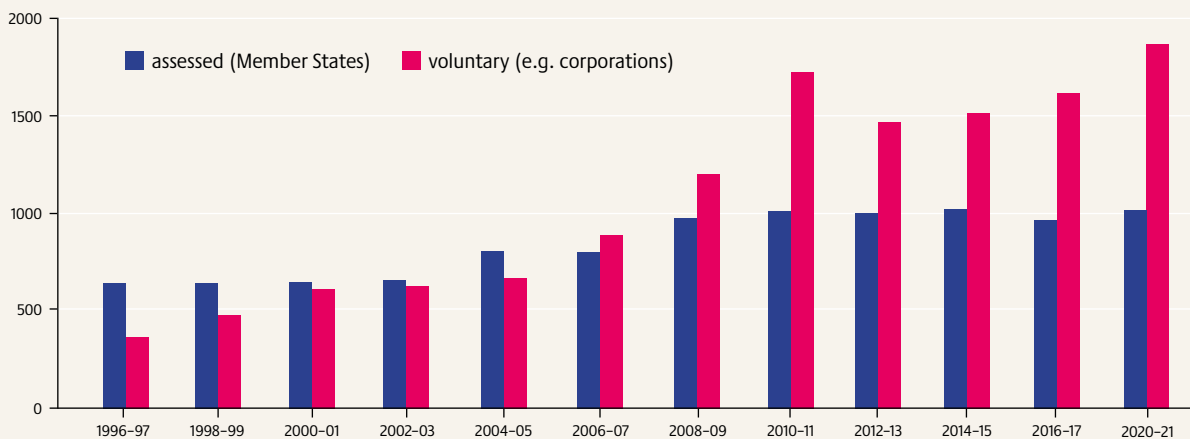
In 1974, alarmed by the erosion of the FAO's mandate, the G-77 bloc of low- and middle-income countries pushed to establish an inter-agency coordination body: the Committee on World Food Security (CFS). Its purpose was to compel the growing constellation of agencies to convene regularly with Member States and mount coordinated responses to future hunger crises. Backed by FAO, IFAD, and the WFP, the CFS became the main intergovernmental forum for global food security policy.

As austerity deepened, food agencies could no longer rely on stable Member-State contributions and became increasingly dependent on voluntary funding. This shift fundamentally transformed UN food governance and pulled corporate money deeper into institutional decision-making. Voluntary funding now accounts for two-thirds of the FAO's budget and for the WFP's entire funding.

FAO reliance on corporate funding is growing: voluntary contributions rose from 36 per cent to 65 per cent of total funding between 1996 and 2021

CORPORATE GIFT-GIVING AS AN AGENDA-SETTING TOOL

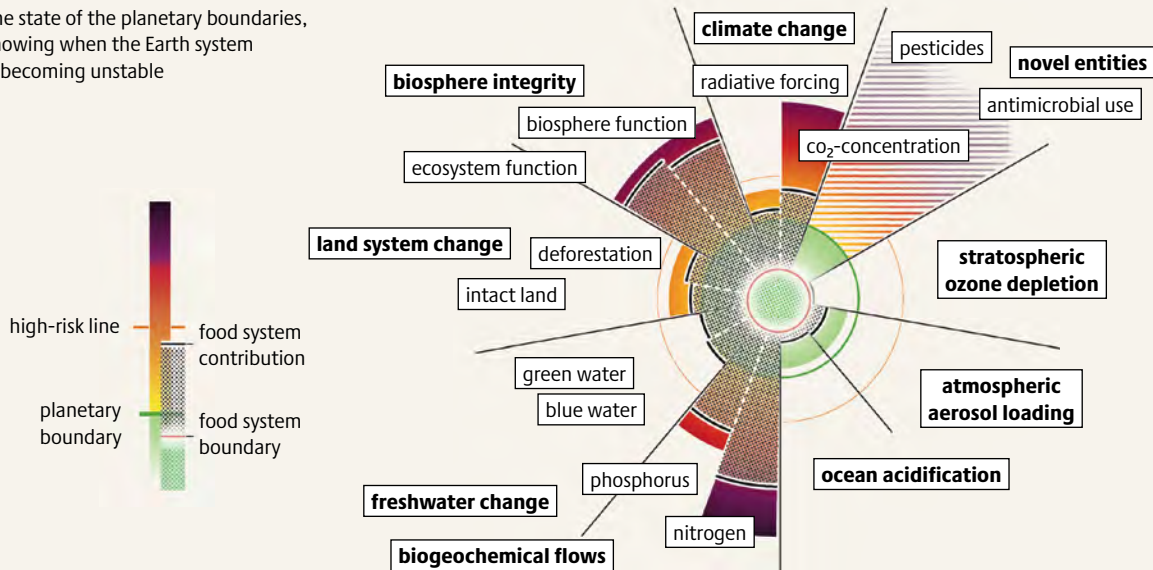
Contributions to the Food and Agriculture Organization of the United Nations (FAO), in million US dollars



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WHO CAN STOP THE TIPPING POINT?

The state of the planetary boundaries, showing when the Earth system is becoming unstable



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This dependence on donor funding realigns institutional priorities and shifts UN agencies away from the public interest. To survive, agencies must satisfy private funders, who can then steer money towards projects that serve their own commercial or geopolitical interests. CGIAR illustrates this trend: its growing dependence on Gates Foundation and agribusiness donors has visibly reshaped its agenda. Research has increasingly focused on technological fixes—such as high-tech intensification and patented bio-digital systems favoured by major investors—rather than on agroecological or traditional farming models supported by Member States and communities. Fragmentation also allows corporations to circumvent unfavourable regulations by lobbying for their preferred policies through whichever institution proves most receptive—a practice known as forum shopping.

In 2009, Member States and civil society groups reformed the CFS in response to these failures. The revamped CFS became the first genuinely inclusive intergovernmental platform, giving civil society, small-scale food producers, and Indigenous Peoples a seat at the table alongside governments. This reform produced policy guidelines that have helped challenge corporate control, including frameworks on agroecology, land tenure, and responsible agricultural investment. However, in the 17 years since the CFS reform, high- and middle-income countries have steadily cut the CFS budget and weakened the role of social movements, leaving the institution struggling for relevance.

The 2021 UN Food Systems Summit (UNFSS) marked a shift towards opaque, corporate-led decision-making. Through a partnership with the World Economic Forum, the summit's organisers promoted investor-friend-

Leading scientists warn the global food system exceeds five planetary boundaries, demanding coordinated global governance

ly technological solutions. Invoking the urgency of the COVID-19 pandemic, the summit bypassed the CFS and spawned a parallel entity: the UN Food Systems Coordination Hub. While the CFS scrapes by on a stagnant annual budget of approximately 2 million US dollars, the new Coordination Hub draws staff and funding from across the entire UN system—a clear sign that resources are shifting away from democratic control.

The current governance structure makes coordinated regulation of the global food chain nearly impossible. The result is a system that corporations can game at will—exploiting rivalries between agencies, competing for their ear, and evading any meaningful regulation.

The 2022 food price crisis exposed the consequences. Fertiliser prices tripled after Russia's invasion of Ukraine. The world's nine largest fertiliser corporations more than tripled their profits compared with pre-pandemic levels. Workers faced wage cuts and job losses, while consumers endured the highest food inflation in four decades. The fragmented governance system failed to deliver a coordinated response.

Now, amid a new food and energy price crises, the window for structural reform has reopened. The leadership of the major UN food agencies is up for renewal, as are the budgets, but it remains unclear who will seize the opportunity. Until food governance is re-anchored in the CFS—with genuinely democratic, accountable structures—corporate power will continue to exploit the gaps. ●

HOW TO FIX A BROKEN MARKET

For millions of households in the United States, putting food on the table has become a daily struggle. Meanwhile, a handful of powerful suppliers dominate everyday staples such as eggs, soft drinks, beef, chocolate. By doing so, they reap enormous profits. One possible solution: public-sector stores that treat food not as a commodity but as a public good to make healthy, affordable food accessible to everyone. This idea could help reshape the food system.

New York City has been hit particularly hard by inflation. Food prices rose by 56.2 per cent between 2012 and 2023. As a result, more than 1.5 million – nearly one in five New Yorkers – are food insecure. More than 40 per cent of families cannot afford their weekly groceries. A February 2026 poll found that 74 per cent of New York families with children had faced a stark choice: put healthy food on the table and feed their children well, or pay the rent or energy costs.

These figures point to a profound market failure: an industry that cannot serve the very communities on its doorstep. But New York, as the United States' largest urban market, is not only a hotspot of the crisis but also a potential testing ground for solutions. The idea of pub-

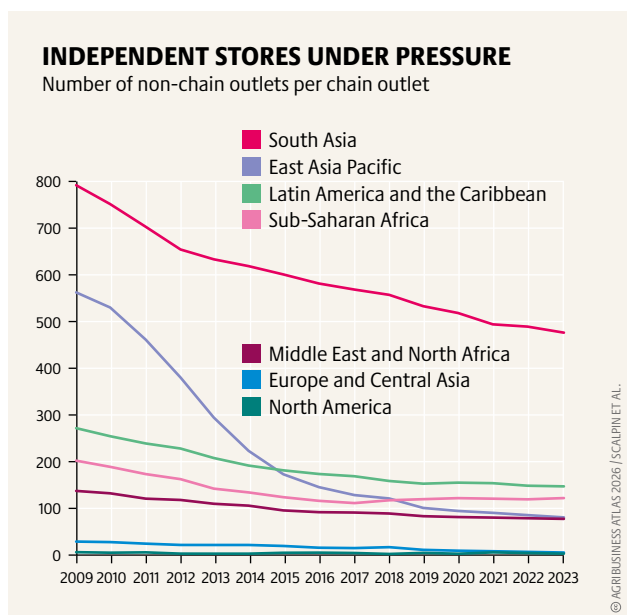
lic-sector groceries struck a chord with voters in New York during Zohran Mamdani's successful mayoral race. The newly elected mayor has proposed a network of publicly owned groceries selling essentials at cost price, with no profit motive. Funding would come from higher taxes on corporations and the wealthiest residents. More than two-thirds of New Yorkers support this idea.

One public-sector model could inspire the project in New York and beyond: the military commissary system, known as DeCA, funded entirely by the US Department of Defense and serving more than 8 million military service members and their families. It saves them nearly 2 billion US dollars annually on essentials. DeCA operates more than 235 stores nationwide. Measured by sales volumes, DeCA ranks among the 20 biggest retailers. Its scale gives it enormous leverage over distributors and manufacturers, allowing it to secure lower wholesale prices. Public funds cover all operating costs – wages, utilities, administration, IT, and rent. In return, commissaries must price their products at least 23.7 per cent below market rates on average. Commissaries rank among the most popular supermarkets nationwide because they do two things well: they stock what people need and want, and they keep prices low.

This shows that public-sector groceries can work. Drawing on DeCA's success, advocates can lay down clear ground rules. Planners must do what the private market has failed to do: keep prices low. To achieve affordability, it is necessary to track the cost of everyday essentials such as milk, meat, butter, bread, and other pantry staples. It is therefore necessary to design a strategy that consistently undercuts the market. And scale matters, too. Stores must be large enough to meet demand and strong enough to negotiate with powerful suppliers. The food industry is not a free market but a system shaped by power. Scale determines who pays, and how much. Public groceries must be built to win.

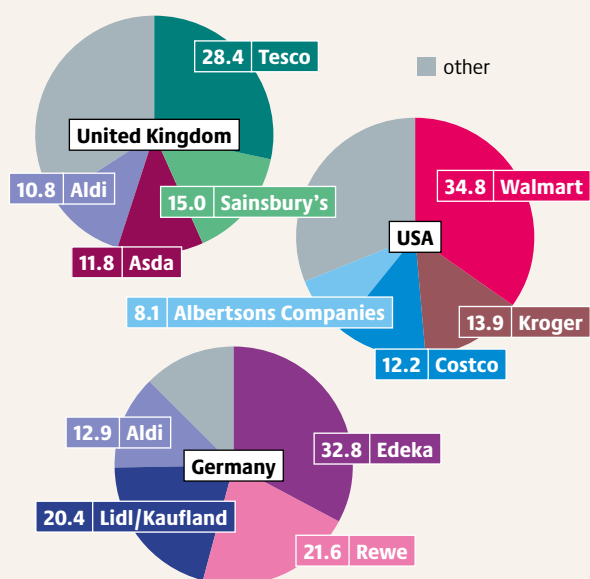
But governance matters just as much. Public-sector groceries must remain publicly owned and operated, with strong community oversight. This keeps pricing and procurement accountable to the public – and gives public agencies time to build the real expertise needed to run stores effectively. Outsourcing to private contractors, by contrast, locks in dependency and keeps prices tied to profit rather than need.

As retail food environments grow more dominant, they increasingly shape diets, reduce affordability, and raise health risks, especially in poor countries

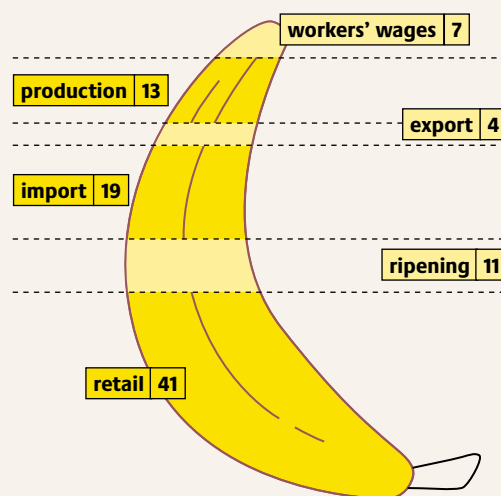


DOMINANCE PAYS

Market share in the supermarket sector in 2024, in per cent



Share of value added along the banana supply chain in the EU's main sourcing countries, in per cent



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To succeed, public-sector groceries would also require sustained public investment. These ongoing operational subsidies cover core costs that private retailers usually finance through margins of 25 to 35 per cent. The more they cut prices for consumers, the more public support they will need. Crucially, the stores must be open to all, not means-tested. In the United States, programmes for the poor quickly become poor programmes. Public transport, libraries, and the postal service offer better models: they work because they serve everyone.

Done right, public groceries could reshape more than prices. They can reverse the race to the bottom on wages and working conditions, forcing private retailers to raise standards. They are no substitute for living wage laws – but where those are absent, they could upend the status quo, in which a significant proportion of shop workers across the United States rely on public assistance, with 75 per cent facing food insecurity, and 14 per cent having faced homelessness.

Public-sector groceries could also transform what ends up on the shelves. By sourcing food according to clear ethical standards, they could ensure that affordable food does not come at the expense of quality, safety, or ethics. Large public institutions have already demonstrated that healthy, sustainable, and fairly produced food can be sourced at scale – a point trade unions endorse. With the right frameworks, public stores could deliver premium-quality products at low prices.

Oxfam's study examines whether trading giants meet their responsibilities, how they treat smallholder farmers and how they scrutinise suppliers

In Ecuador, where bananas for Europe and the USA are grown, trade unions criticise the systematic violation of human rights on plantations

The growing popularity of the idea of public groceries reflects two simple truths: the affordability crisis is real, and people want solutions now. After years of inflation, the private sector has failed to provide affordable, abundant, and convenient good food. Public groceries offer a different path – one that treats food not as a commodity, but as a public good. That would make the right to food something more than a slogan and good food genuinely accessible to all. ●

FALLING SHORT

Assessment of how comprehensively supermarkets uphold human rights across the supply chain, 2022, in per cent

	Tesco	Sainsbury's	Rewe	Jumbo	Edeka
overall score	61	55	48	35	11
transparency	63	58	58	54	17
workers' rights	79	54	54	38	13
engagement with smallholder farmers	29	58	50	17	13
women's rights	76	48	29	33	0

more than 60
25 to 60
less than 25

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THE PUBLIC PLATE'S UNTAPPED POWER

Public food procurement is largely driven by cost minimisation, reinforcing corporate concentration and the spread of ultra-processed foods. Brazil offers a different model, using public purchasing to support smallholder farmers and improve diets.

The public sector buys food on a vast scale: from school meals and military rations to hospital cafeterias and prison kitchens. In the European Union (EU) alone, public procurement of food and catering services amounts to an estimated 50 billion euros annually. The United States federal government spends around 35 billion US dollars each year on school food programmes. This gives governments enormous market power, enough to set terms for entire agricultural sectors.

Yet in most countries, public food purchasing is driven by cost minimisation. Procurement contracts typically reward the lowest bidder, channelling public funds towards the largest food corporations able to supply bulk commodities at the cheapest price. The result is a system in which public money reinforces corporate concentration, driving down food quality, squeezing smallholder farmers, and externalising environmental and healthcare costs. A handful of transnational food service corporations such as Compass Group, Sodexo,

and Aramark dominate institutional catering across the Global North, with combined annual revenues exceeding 85 billion US dollars.

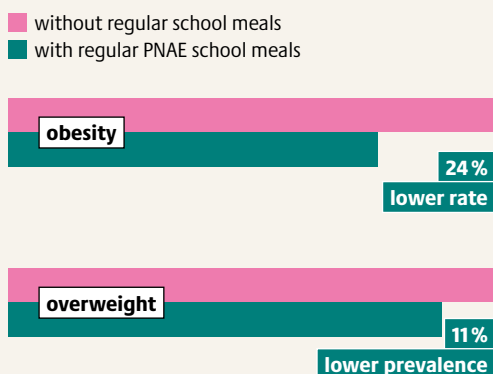
A 2024 global review found that just 25 per cent of countries regulate the sale of unhealthy competitive foods on school grounds, and only 16 per cent restrict food marketing in schools. As a result, school food environments remain largely open to ultra-processed food manufacturers, which benefit from procurement systems designed around cost minimisation and shelf stability.

An alternative model can be seen in Brazil, where public procurement is redirected towards fresh food from smallholder farmers. The country's National School Feeding Programme, known by its Portuguese acronym PNAE, is one of the largest in the world and provides meals to more than 40 million students each day across 155,000 schools. A 2009 federal law requires that at least 30 per cent of PNAE funds be used to purchase food directly from family farmers – smallholders who rely primarily on household labour and manage limited landholdings. By 2024, the programme channelled roughly 284 million US dollars per year to smallholder producers. This created guaranteed markets that stabilise rural livelihoods and reward diversified, agroecological farming practices through price premiums and procurement priorities for organic and minimally processed foods. In 2026, a new law raised the minimum share for family farming to 45 per cent of funds, channelling more than an estimated additional 450 million US dollars per year to smallholder producers. It gives explicit priority to agrarian reform settlements, Indigenous and Quilombola communities, and women's cooperatives.

Brazil's complementary Food Acquisition Programme (PAA), established in 2003, extends this approach further. The PAA enables government agencies to purchase food directly from family farmers without competitive bidding, as long as purchases remain below annual per-farmer limits. The food is then distributed to food-insecure populations through food banks, community kitchens, and social assistance networks. At

HEALTHY MEALS FOR A FAIRER FUTURE

Effects of the Brazilian National School Feeding Program (PNAE)

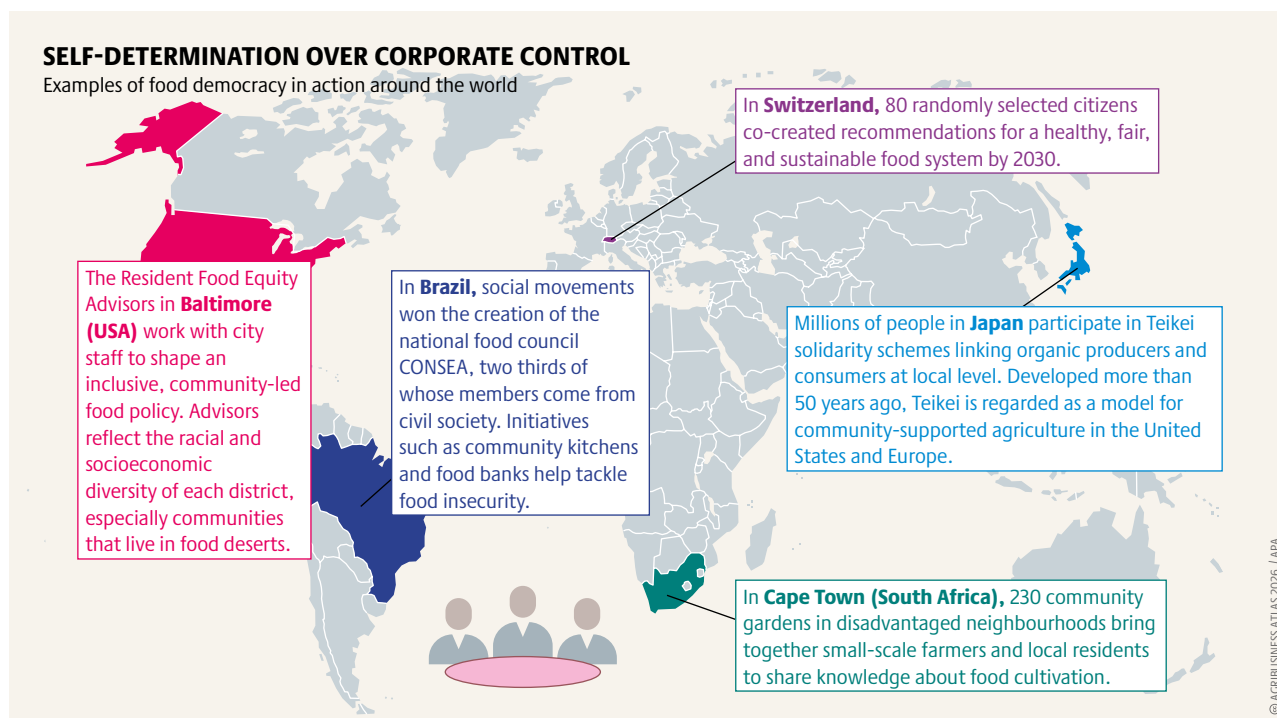


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In Brazil, state school meals keep pupils healthy, cut waste, and support local farms, while limiting big firms' grip on children's food choices nationwide

SELF-DETERMINATION OVER CORPORATE CONTROL

Examples of food democracy in action around the world



its peak, the PAA reached approximately five per cent of Brazil's four million family farmers each year. Between 2003 and 2011 alone, it purchased more than 3.5 million metric tonnes of food. In 2023, its first year of restoration after severe budget cuts, the programme generated income for over 81,000 family farming households. Of these, 61 per cent were headed by women.

The Brazilian example represents a deliberate inversion of conventional procurement logic. Rather than prioritising the lowest cost per calorie, Brazil's framework treats public food purchasing as an investment in multiple outcomes: nutrition, rural development, and food sovereignty. But the model has not been without difficulties. Between 2016 and 2022, PAA funding fell by more than 80 per cent from its 2012 peak, as successive administrations prioritised fiscal austerity and agribusiness interests. Restoration after 2023 introduced dedicated procurement streams for Indigenous and Quilombola communities. However, as of mid-2025, only one-third of Brazil's 5,570 municipalities were participating in the programme.

Despite these challenges, Brazil's model has influenced similar efforts elsewhere. In 2020, Colombia adopted legislation requiring that 30 per cent of public food procurement be sourced from smallholder and peasant farmers. India's midday meal scheme, which serves approximately 120 million children, has begun

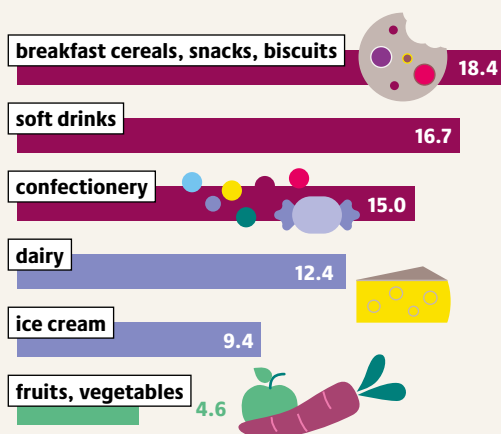
Corporations chase profit by producing ultra-processed food. The state must push back, starting with what it serves in public institutions

In food policy councils, citizens push for healthy local food, fair prices, and better pay, proving that the way we eat is political and can be shaped

linking procurement to local producers, although centralised commodity distribution still dominates. In the United States, farm-to-school programmes have grown from a handful of pilot projects in the early 2000s into initiatives serving local food in more than 74,000 schools. In the 2022–2023 school year alone, they spent an estimated 1.8 billion US dollars on locally sourced products. However, these programmes lack the mandatory procurement thresholds that give Brazil's approach its force. ●

UNHEALTHY FOOD MAKES BIG BUSINESS

Average profit margins of selected food categories, in per cent



THE FUTURE OF AFRICAN FOOD SYSTEMS

Across Africa, millions of people still rely on territorial markets rooted in local food cultures and informal trade. As food imports rise and ultra-processed diets spread, these food networks are not relics of the past, but essential to Africa's future. Yet these systems are rarely in the focus of agricultural or investment policy.

Africa is not fed primarily by the globalised, input-intensive food economy that dominates many policy debates. Much of the continent's food still passes through local and territorial markets rooted in small-scale farming, short supply chains, and culturally specific diets. Recent advocacy work and policy research argue that territorial markets remain central to food distribution across much of Africa, even though official statistics often fail to capture their full scale and governments fail to prioritise them in investment strategies.

The picture becomes clearer when we look at who keeps these markets running every day. Territorial markets are more than places of exchange: they connect producers, transporters, processors, cooks, and traders. Women play a particularly important role

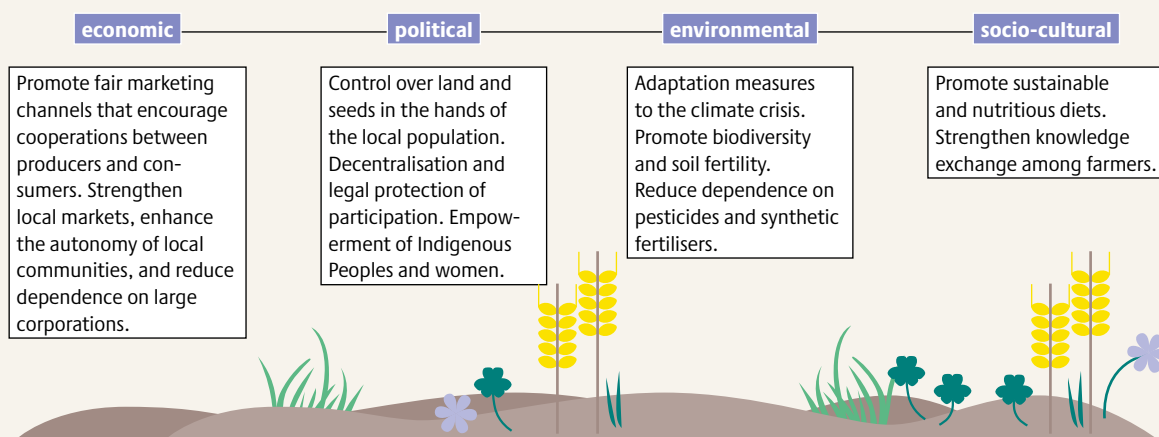
within these networks. Research on African trade consistently shows that women make up the majority of informal cross-border traders in many countries, with estimates ranging from 70 to 80 per cent. This matters not only from a gender perspective, but also from an economic one. When governments neglect market infrastructure, border management, storage, or legal protections for traders, they weaken a food distribution system that depends heavily on women's labour.

Led by the Alliance for Food Sovereignty in Africa (AFSA) with members and partners across the continent, the My Food is African campaign seeks to make that reality more visible. It is about far more than celebrating African cuisine; it also forms part of AFSA's broader effort to promote agroecology, food sovereignty, territorial markets, and locally managed seed systems. At its core, the campaign challenges the idea that African food systems only become valuable when they grow increasingly industrial, standardised, and integrated into global commodity chains. Instead, those involved in the campaign argue that local food systems already generate economic, ecological, and nutritional value, even if mainstream agricultural

The rights to self-determination, land, and resources form the foundation of the agroecology movement dedicated to transforming our food systems

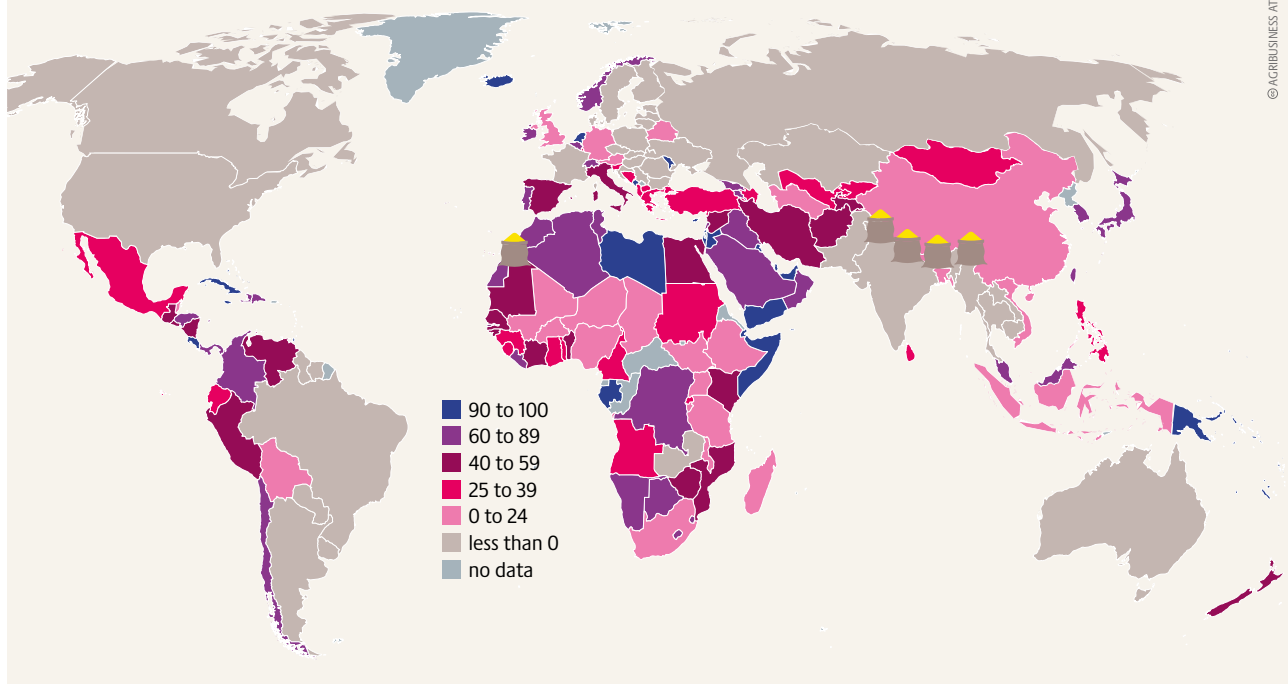
THE WHOLE PICTURE

Principles of agroecology



MAPPING CEREAL IMPORT DEPENDENCE

Cereal import dependency ratio 2021 to 2023, in per cent



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policy often fails to recognise or measure that value properly.

The argument gains even more force when placed against current trends. Africa's annual food import bill now stands at roughly 50 billion US dollars, a figure often cited as evidence of growing dependence on external supplies of key staples. At the same time, changing urban diets are increasing exposure to ultra-processed foods and diet-related disease. According to the World Health Organization (WHO) African Region's 2024 report, around 1.6 million people aged between 30 and 70 die prematurely each year from major non-communicable diseases. These figures do not suggest that imports or supermarket expansion are inherently harmful. They do, however, challenge the assumption that a more globalised food system automatically improves diets, resilience, or public health.

For that reason, reclaiming African food systems is about more than culture alone. Territorial markets tend to spread participation across many actors, including smallholders, traders, transporters, processors, and consumers. Industrial food systems, by contrast, often concentrate power in fewer corporations, rely on long supply chains and input-intensive models that increase dependence on imported seeds, fertilisers, packaging, and retail infrastructure. The point is not to romanticise local markets or dismiss formal retail systems altogether. The real question is which systems are more resilient, more inclusive, and more accountable to the people who actually produce and buy food every day.

Dependence on grain imports increases risks. Regional markets strengthen food security, stabilise prices, and reduce the impact of geopolitical crises

From this perspective, AFSA and allied networks are working to strengthen territorial markets rather than treating them as relics of the past. That includes support for agroecological entrepreneurship, local procurement, cross-border trade initiatives, food festivals, collaborations with chefs, and campaigns promoting healthy local foods. These activities may appear modest beside large-scale industrial investment, but they address a basic policy failure: systems that already feed millions are still expected to survive without the infrastructure, legal recognition, and public investment routinely granted to export-oriented or corporate food chains.

The future of African food systems, just as in other regions, not be shaped by technology or global market integration alone. It will also depend on whether governments, researchers, and development organisations are willing to recognise what already exists: territorially rooted food systems that continue to feed large populations, sustain livelihoods, and pass on cultural knowledge under difficult conditions. The evidence does not suggest that these systems are perfect. It does suggest that they are indispensable, and that policy frameworks treating them as informal leftovers rather than foundational institutions risk misreading how food security actually works across much of the African continent. ●

WHEN PRICES FAIL TO SUSTAIN INCOMES

Deregulation of agricultural markets has led to volatile prices, unequal subsidies and farmers often selling below production costs. This undermines livelihoods and sustainable farming. Stronger European market regulation and fair pricing rules are needed to secure stable incomes and sustainability, and drive the much-needed agroecological transition.

Since the Blair House Agreement in 1992 and the establishment of the World Trade Organization (WTO) agreements in 1994, regulation of agricultural markets has been steadily rolled back. Tools to stabilise prices and production in specific sectors have been dismantled. As a result, agricultural prices have become volatile, as demand for food changes little while harvests fluctuate with weather and other factors. This leaves farmers' income swinging and forces them to live with uncertainty, even though they already have structurally weak bargaining power when dealing with processors and retailers.

To offset the effects of market deregulation, the European Union (EU) introduced direct payments to farm-

ers in 1992, later decoupling them from production in 2003. These payments are allocated according to farm size, which encourages land and production to be concentrated in fewer hands. Today, they are distributed just as unevenly as farmland ownership: 80 per cent of payments go to 20 per cent of farms in the EU. Many small farmers are excluded due to the minimum requirements set by Member States.

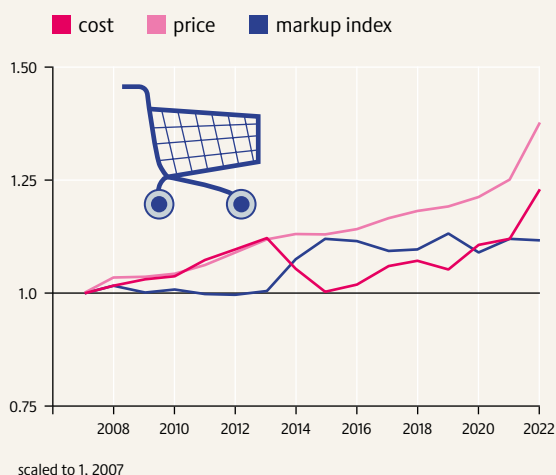
Prices paid to farmers for agricultural products fell sharply after deregulation in the early 1990s. Today, corporations often buy farm produce at prices below the cost of production without passing these lower prices on to consumers, pointing to a severe imbalance in how value is distributed across the food supply chain. The 2025–2026 price crisis in the European milk sector illustrates this dynamic. Milk output has surged due to the intensification of production, leading to overproduction. Milk prices have been falling for months, leaving thousands of producers unable to cover their costs.

Pairing market deregulation with area-based direct payments as compensation has failed to give farmers

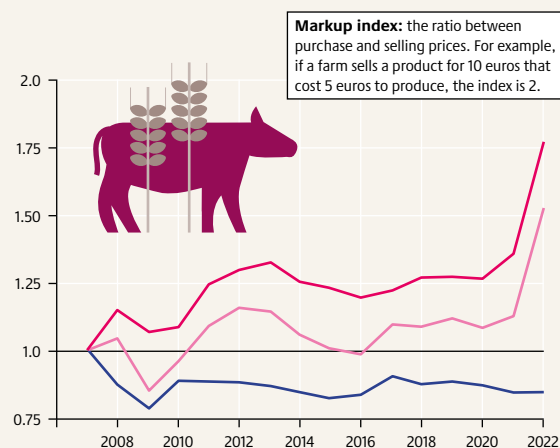
The German example shows how oligopoly shifts profit margins from farmers to large manufacturers and food retailers, as in many countries

THE FINAL BILL

Prices, costs and markups in the German food retail sector



Prices, costs and markups in German agriculture

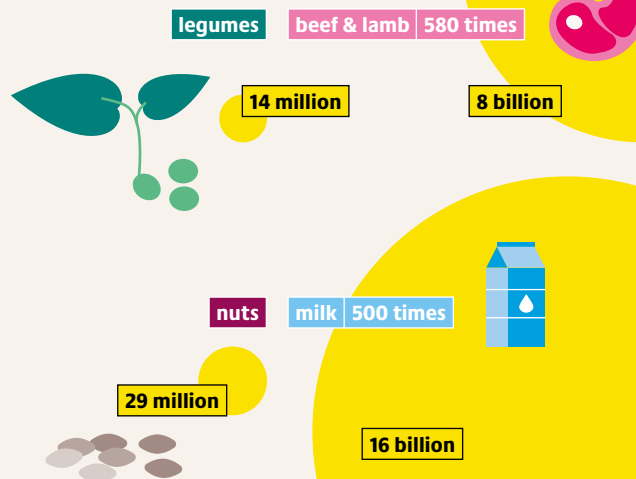
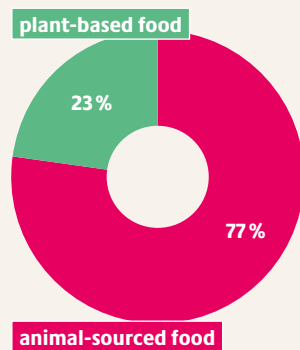


Markup index: the ratio between purchase and selling prices. For example, if a farm sells a product for 10 euros that cost 5 euros to produce, the index is 2.

UNEQUAL FIELDS

Share of EU CAP subsidies in 2020

● EU CAP subsidies in 2020, in euros



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a viable livelihood, let alone enable them to produce healthy food using sustainable practices. Farmers are pushed to compete and produce at the lowest possible prices, externalising hidden social and environmental costs of this model of food production. Agricultural policy measures to ensure environmental and social conditionality have been ineffective in addressing the negative effects of the industrial intensification driven by a race to the bottom on price.

Peasant farmers' organisations are calling for policies to secure fair prices through market regulation grounded in the principles of food sovereignty and agroecology. The approach to regulate agricultural markets is nothing new. The unique nature of agriculture has been shaped by government intervention since ancient times. In the EU, market regulation was at the heart of the creation of the Common Agricultural Policy (CAP) and central to the founding principles of the EU itself. Despite the gradual weakening of agricultural market regulation, the EU still has a wide range of instruments at its disposal that could be used or improved to ensure fair prices.

One example is the European Directive on Unfair Trading Practices. It aims to address stark imbalances between small and large operators in the food supply chain. Its implementation in Spain through the Food Chain Act offers a useful case in point. The law obliges each link in the food supply chain to buy and sell at prices that cover production costs, beginning with producers. They have the right to anonymously report sales of their produce below production costs. These costs are co-defined by the producers themselves on a case-by-case basis. The ban has proven effective and helped raise the prices farmers receive.

The EU's next farm policy could drive healthy, sustainable food systems, or keep wasting billions on a broken status quo

However, national action alone is not enough. The EU also needs coordinated policies to regulate the common market and avoid unfair competition between countries. For this reason, peasant farmers' organisations are now calling for a ban on buying below production costs to be included in the directive and applied across Europe.

Similarly, the Common Market Organisation (CMO) within the CAP is the EU's main framework for regulating agricultural markets. It has the potential to stabilise farm incomes, support sustainable production systems, and strengthen the resilience of European food systems. A range of instruments could help achieve these goals, including public intervention stocks, supply management mechanisms, and minimum purchase prices. For instance, public stockholding schemes can stabilise prices by buying products when prices fall below a certain level and releasing them during periods of shortages, thereby reducing extreme price fluctuations. The recent EU decision to make written contracts between farmers and processors or retailers mandatory is a first step in the right direction.

In short, Europe's ability to meet environmental, social, and geopolitical challenges depends on whether those who produce our food and shape our landscapes are paid fairly. In an increasingly unpredictable global context, price and income stability must be secured through market regulation rooted in food sovereignty and agroecology. This will require a fundamental shift in EU agricultural policy. ●

A SHIELD AGAINST CRISES

Wars and speculation are pushing up prices of agricultural commodities and food worldwide. Public buffer stocks for food can help cushion inflation and the impact of price shocks.

Low and middle-income countries are hit hardest by rising commodity prices: food becomes more expensive, overall inflation accelerates, and food insecurity deepens. In countries that are heavily dependent on food imports, price shocks on global markets also exacerbate existing debt problems. Angola, Mozambique, and Rwanda, which import almost all the wheat they consume, exemplify this trend. Rising world market prices for agricultural commodities have negative impacts in the Global North as well. During the COVID-19 pandemic and following the start of Russia's full-scale invasion of Ukraine, rising commodity prices drove inflation in the United States and Europe, placing a disproportionately heavy burden on low-income households. Studies indicate that soaring prices have fuelled the rise of right-wing populist forces.

In times of crisis, agricultural markets become even more susceptible to speculation, pushing prices higher. Immediately after Russia's invasion of Ukraine, speculative agricultural funds attracted as much

money in a single week as they would normally receive over an entire month. What, then, can be done? At their summits in Brazil and South Africa, the G20 countries discussed stabilising prices through public buffer stocks for food. The principle is simple: public authorities purchase agricultural products when prices are low and release them onto the market when prices are high.

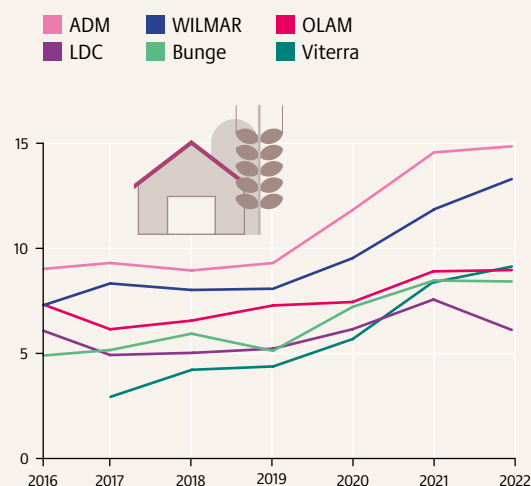
In the years following the Second World War, public commodity reserves played an important role at both the national and international level. Yet many of these reserves were closed as part of austerity programmes. Economic crises in South America and Africa in the 1980s led to a sustained collapse in many commodity prices. When many governments began to deregulate their markets under neoliberal policies, national reserves were dismantled. In some countries, however, public stocks have continued to play an important role. Populous countries such as China, India, and Indonesia still stabilise the prices of key foodstuffs through large public buffer stocks, often in combination with trade restrictions. In countries such as Bangladesh, Japan, Kenya, Norway, South Korea, Switzerland, and Uzbekistan, smaller reserves are used to cushion supply shortages following crop failures or trade crises.

Private corporations, such as agricultural traders, also hold commodity stocks, but not with the aim of stabilising prices. When calculating their profits, agricultural businesses and trading corporations do not factor in the consequences of sharp price fluctuations, such as hunger, debt or inflation. As a result, far smaller quantities are stored than would be desirable from a societal perspective. In times of crisis, agricultural markets are also prone to speculative bubbles and panic buying. The situation is further aggravated by the fact that large agricultural trading corporations do not disclose information about their stock levels.

Public buffer stocks for food, by contrast, can help to stabilise markets in times of crisis. When they are well-designed and transparently managed, they can even do more than merely stabilise prices: they strengthen local markets and can support farmers in making the transition towards greater sustainability. Brazil provides a clear example in its state supply

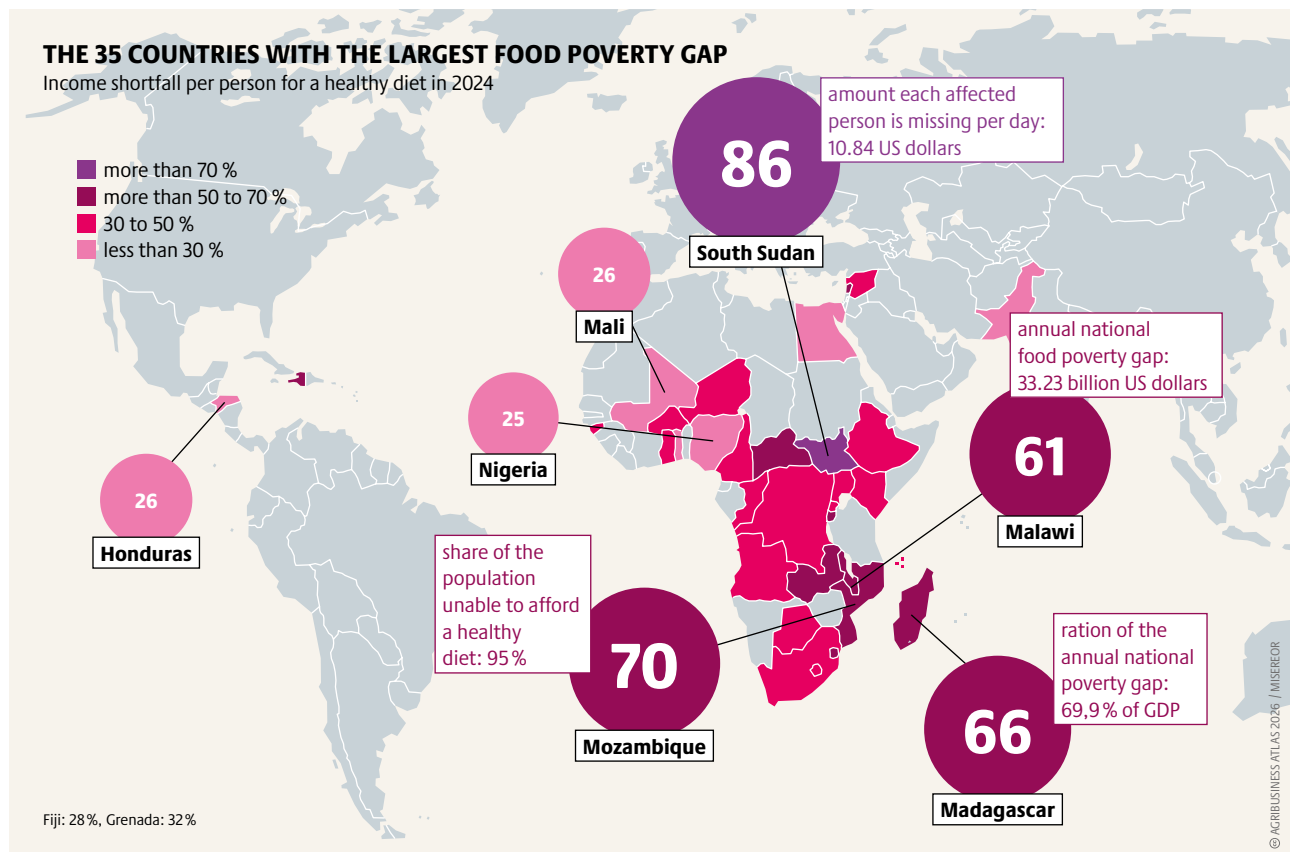
WHEN FOOD BECOMES A BET

Estimated value of stockpiles held by selected agricultural commodity traders, in billion US dollars



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With a combined storage capacity of 68 million tonnes, ADM, Bunge, and COFCO can hold wheat equal to the annual consumption of the UK, US, and Turkey



agency, CONAB. When market prices for agricultural goods fall below a threshold previously set on the basis of production costs, the agency intervenes. It either purchases directly from producers or pays them the difference between the market price and the guaranteed minimum price. The purchased products are then stored or supplied to school canteens. This also helps to create a market for sustainable products: CONAB deliberately sources produce from small-scale family farms and supplies them to community kitchens, schools, and food distribution centres for low-income households. This is made possible by Brazil's school feeding programme, which requires at least 30 per cent of the food served to come from family farms, preferably from local and environmentally sustainable production.

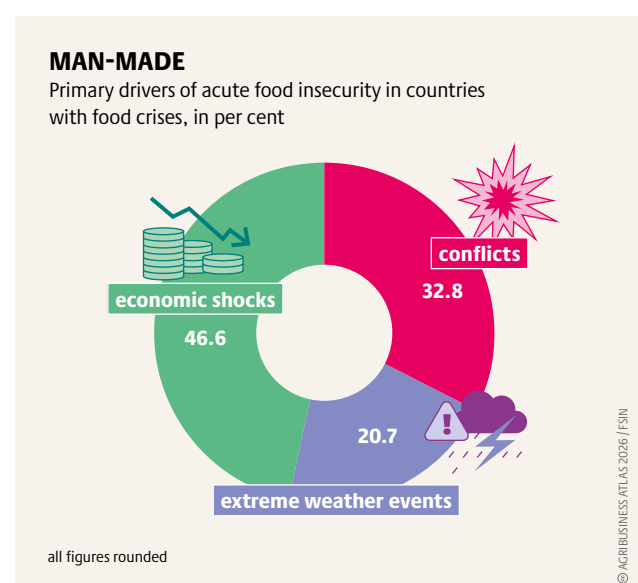
For public buffer stocks for food to work effectively, several measures must be in place. Continuous monitoring of prices and production volumes is essential. In 2024, the European Union established an expert commission for this purpose. In addition, the reserves should be managed by independent, democratically accountable authorities. Public food assistance programmes, as well as hospitals and canteens in public

Up to 80 per cent of household income is spent on food, leaving the Global South especially vulnerable to sudden price shocks

The global poverty gap totals 3.25 trillion US-dollars.

The annual revenues of the seven largest corporations would be enough to feed everyone

institutions, can support agriculture by purchasing stored products and using environmental standards to create targeted incentives for sustainable production. If regional markets become oversupplied, minimum prices should be lowered or linked to production quotas to prevent overproduction. ●



AUTHORS AND SOURCES FOR DATA AND GRAPHICS

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10-11 HISTORY

HOW OUR FIELDS TURNED INTO FACTORIES by Jennifer Clapp

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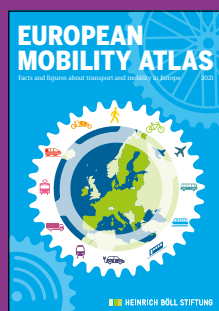
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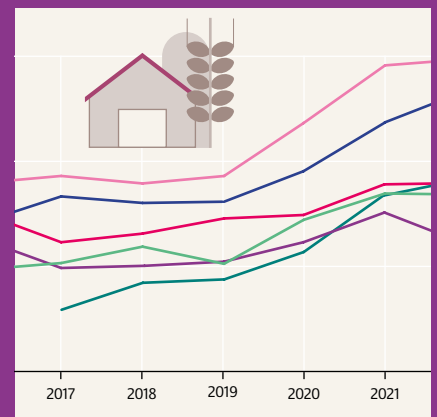
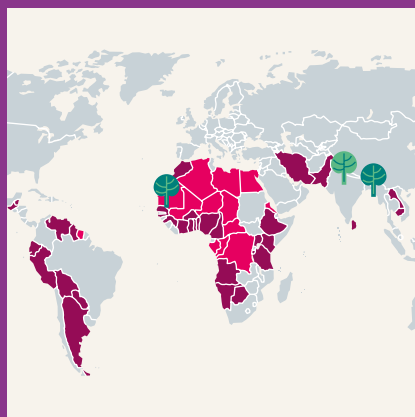
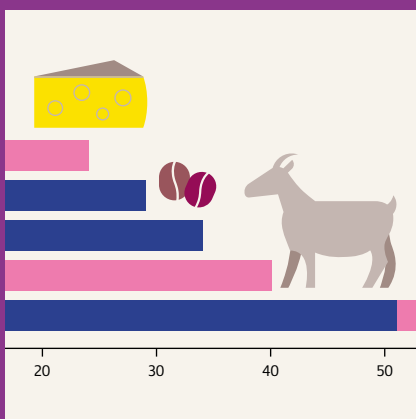
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