VII. AGRICULTURAL POLICY REFORM: THE NEED FOR FURTHER PROGRESS

Introduction

Agricultural policies pursue several objectives

Agricultural policies pursue a number of objectives, including *inter alia*, providing adequate food supplies, at reasonable price levels, supporting farm household incomes, contributing to rural community well-being, and ensuring environmental sustainability as well as other societal goals. This chapter[1] reviews recent progress in policy reform, assesses the economic costs and effectiveness of agricultural policies and describes their effects. Notwithstanding recent progress, agricultural policies have not been particularly effective in achieving some of their economic objectives, despite being rather costly to consumers and taxpayers. Moreover, they have side-effects on trade, the environment and developing countries.

Progress in policy reform

Government intervention in agriculture has a long history

Governments in most OECD countries have traditionally pursued a wide range of policies to support farm income and ensure adequate food supplies. Production-linked incentives, operating largely on farm commodity prices, have been complemented, or partly replaced, by income support measures. Import tariffs and quotas, export subsidies and special trade-access arrangements between countries have also been widely used. More recently, policy measures have been taken to pursue aims related to environmental quality, food safety and the welfare of animals; these measures have often consisted of a continuation of existing production-linked measures, with conditions attached, such as environmental compliance or input constraints. A number of OECD countries attach great importance to these and other "non-trade concerns". In OECD analysis, such concerns are encompassed in a concept known as "multifunctionality" (Box VII.1).

Notwithstanding some reform progress…

Some progress in reforming agricultural support policies has been achieved, especially in the early and mid-1990s. For the OECD as a whole, the level of support, as measured by the Producer Support Estimate (PSE), dropped by more than

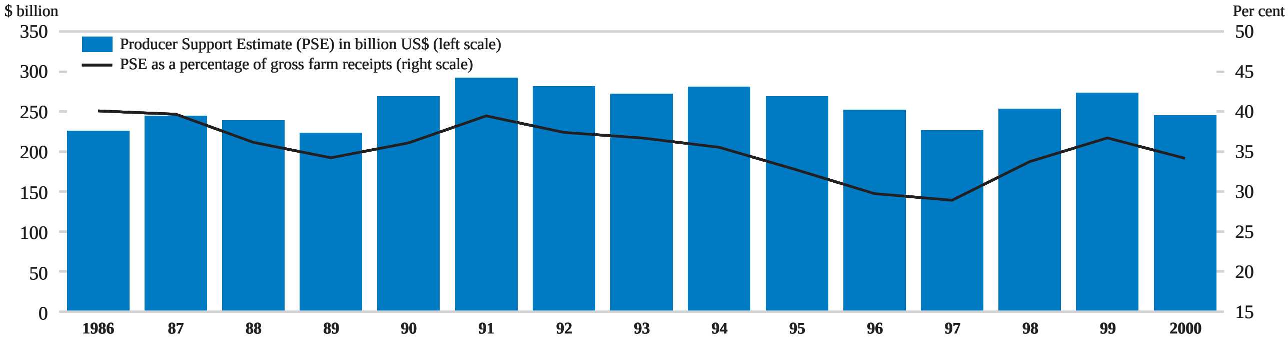
1. This chapter has been written jointly by the Economics Department and the Directorate for Food, Agriculture and Fisheries. It draws on the substantive work conducted in the latter Directorate – in particular the Monitoring and Evaluation 2001 Report (OECD, 2001*a*), of which Part I (including the Executive Summary) was approved for publication by the OECD Committee for Agriculture and the Trade Committee whereas Part II was published under the responsibility of the Secretary General. The present chapter is not based on consensus reached in OECD committees.

Box VII.1. **The "multifunctionality" of agriculture**

The notion of agriculture as a "multifunctional" sector although widely invoked, is not always well defined and therefore prone to different interpretations. In particular, there are widely differing views as to its policy implications. Some countries believe that production-linked support and border measures are necessary in order to maintain or increase the multifunctional character of agriculture and that it should be taken into account in the multilateral trade process. Another group of countries promotes targeted production-neutral measures. A further group rejects any role for production or trade related policy instruments and is sceptical of the inclusion of multifunctionality in multilateral trade negotiations. In an attempt to overcome these problems the OECD has elaborated a common terminology, identified the key policy issues at stake and developed a framework to help countries design their domestic policies, including those compatible with further trade liberalisation. From this analysis multifunctionality emerges as a characteristic of the agricultural production process whereby agricultural commodities and certain other "outputs" related to environment, culture, rural development, food security or other societal goals, are joint products. Whether and which policy intervention is justified depends on this jointness – its nature and strength, on whether there are market failures and on the extent to which the "outputs" in question are public goods. This framework should enable governments to weigh the potential benefits of of different policy options against their direct and indirect costs thus narrowing differences between countries concerning policy reform strategies and on-going trade liberalisation efforts.

20 per cent between 1991 and 1997 (Figure VII.1). Furthermore, in the six years to 1997, there was some move away from the more distorting market price support and payments based on output to budgetary payments less linked to production (Figure VII.2). This also implied that the burden of support for agricultural policies, by moving from prices to public budgets, was becoming more transparent. However, since 1997, for the OECD as a whole no major progress has been made in reducing the share of market price support and payments based on output, and the level of support has increased. An important reason for this increase has been the fall in commodity prices on the world market. This has led to an increase in the level of price support to the extent that domestic prices were not reduced at the same rate. For example, in 1997 the average price received by OECD farmers was 29 per cent above the world price.[2] By 1999, the difference had increased to 44 per cent.

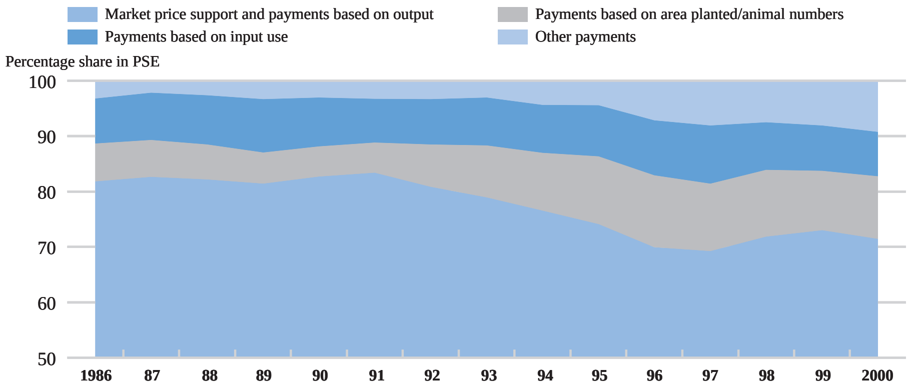
Figure VII.1. **Total OECD producer support estimate**



Sources: OECD (2001*a*), PSE/CSE database 2001.

2. As measured by the Producer Nominal Protection Coefficient, an indicator of the nominal rate of protection to producers measuring the ratio between the average price received by producers (at farm gate), including payments per tonne of output, and the border price (measured at the farm gate level).

Figure VII.2. **Composition of total OECD producer support estimate**



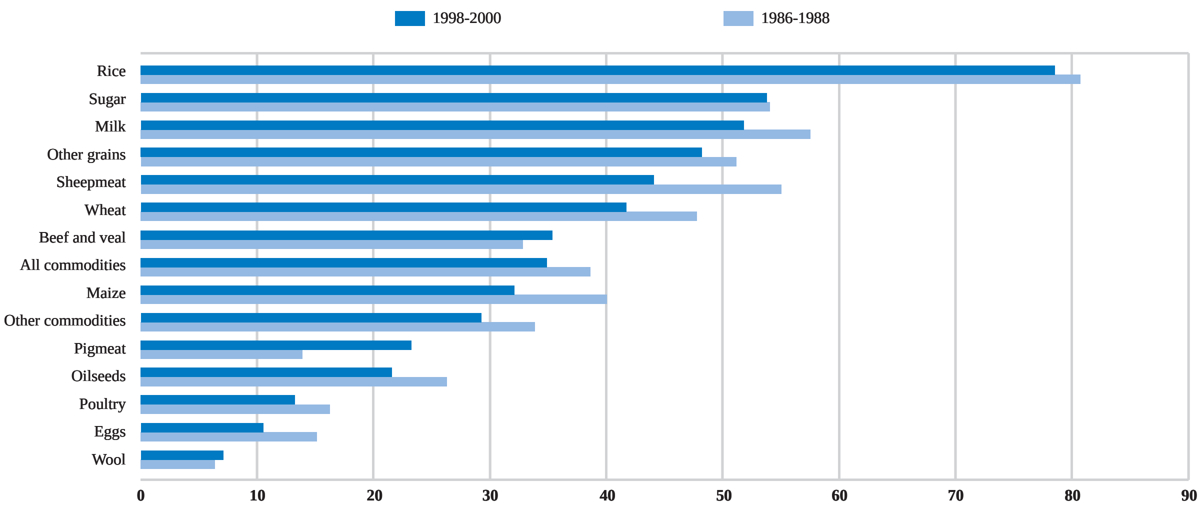
Source: OECD PSE/CSE database 2001.

… support levels remain high and vary between commodities and countries

The level of support to agriculture in OECD countries is not only high, but also very unequal across commodities and countries. While support for rice, sugar and milk remains above 50 per cent of gross farm receipts, payments to wool, eggs and poultry farmers are significantly lower (Figure VII.3). As for the geographical distribution of support, the European Union, Japan and the United States account for around four-fifths of the total. Measured as a per cent of the value of gross farm receipts however, support is greatest in Switzerland, Norway, Korea, Iceland and Japan (Figure VII.4). Among the high-support countries, the European Union and other European countries have made the most progress in moving away from the more distorting types of support since the mid-1980s.

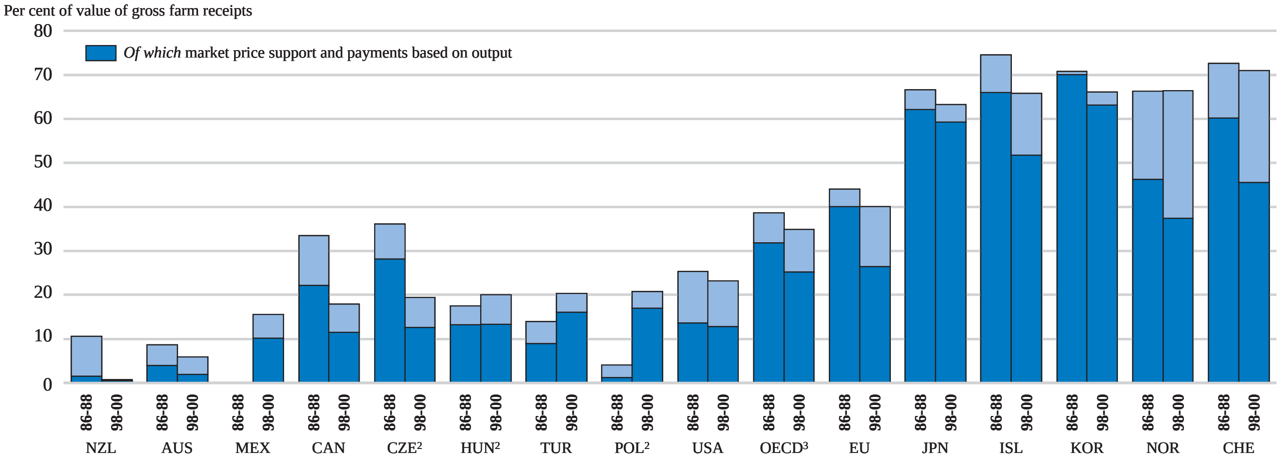
Figure VII.3. **Producer support estimate by commodity**[1]

OECD average as a percentage of value of gross farm receipts



1. Products are ranked according to 1998-2000 levels.
Sources: OECD (2001*a*), OECD PSE/CSE Database, 2001.

Figure VII.4. **OECD producer support estimate by country**[1]



1. Countries are ranked according to 1998-2000 levels.
2. For the Czech Republic, Hungary and Poland, 1986-88 is replaced by 1991-93.
3. For 1986-88, the Czech Republic, Hungary and Poland are excluded.

Source: OECD PSE/CSE database 2001.

Problems with market access remain

A major factor shaping policy reform was the Uruguay Round of multilateral trade negotiations, concluded in 1994 (Box VII.2). However, notwithstanding its achievements in establishing disciplines on the agricultural sector, the overall effects of the Uruguay Round in terms of levels of protection and trade in agricultural products have been limited (OECD, 2001*j*). Import penetration in food products remains considerably below that of other sectors (Coppel and Durand, 1999), and agricultural tariff rates considerably higher than tariffs on manufactures (OECD, 2002) (Table VII.1).[3] Agricultural tariff schedules also tend to be more complicated, with many specific or complex rates, as well as many "mega-tariffs" exceeding 100 per cent for the more "sensitive" products.

Disciplines on domestic support have reduced distortions

Uruguay Round disciplines had a stronger impact on the composition of domestic support in OECD countries than on its overall level, which has been more influenced by changes in commodity prices. Indeed, as a result of the domestic support disciplines arising from Uruguay Round Agreement on Agriculture, the share of the most distorting form of support (classified as "amber" box and subject to reduction commitments) fell from 70 to 40 per cent of total between 1986-88 and 1995-98, as countries have increasingly used support that falls either into the "green box" (least trade distorting) or the "blue box" (intermediate) category (Figure VII.5).

New policy initiatives are likely to lead to a reduction in export subsidies

The new disciplines on agricultural export subsidies have spurred few policy changes in its first few years, since cuts were required from a relatively high base (OECD, 2000*j*).[4] In more recent years, export subsidy commitments have gradually

3. Recent estimates suggest that agricultural tariff rates average around 60 per cent in the OECD area, as compared to only 4 per cent for manufactures (Gibson *et al.*, 2001).
4. Export subsidy levels in the base period, from which reductions were calculated, were abnormally high. This created the paradoxical situation whereby distortions caused by export subsidies could, for some countries and commodities, have increased relative to the period immediately prior to Uruguay Round implementation. The value of subsidised exports from OECD countries declined by 7 per cent between 1995 and 1998, but this was mostly a result of strong commodity prices. Indeed, for some commodities, the share of notified subsidised exports in total exports has increased substantially during that period. Several countries have actually overshot annual export subsidy commitments, making use of carry-over provisions of the Uruguay Round Agreement.

become more binding, as allowances have declined (as scheduled) and world commodity prices have weakened. This has led to a number of policy initiatives designed specifically to meet Uruguay Round commitments, including the European Union's "Agenda 2000" reforms. These initiatives are likely to translate into a reduction in export subsidies in the next few years.

Box VII.2. **Key results of the Uruguay Round Agreement on Agriculture**

The Uruguay Round Agreement on Agriculture was an important step towards bringing agricultural markets under similar disciplines as other traded sectors. It was implemented by developed countries between 1995 and 2000, with developing countries having an additional 4 years. The Agreement imposed disciplines on trade distorting policies:

– *Tariffs were bound and subject to reduction commitments.*

– *Non-tariff barriers were converted to tariffs that were also bound and subject to reduction commitments through a process called "tariffication"*. Tariff rate quotas (two-tier tariff regimes with different tariffs for in-quota and out-of-quota imports) were established to provide minimum and current access for products that previously were protected by non-tariff barriers. Developed and developing countries agreed to reduce their average tariff by 36 and 24 per cent respectively.

– *Export subsidies on agricultural products were for the first time subject to disciplines*. Developed and developing countries agreed to reduce subsidised export volumes by 24 and 16 per cent respectively and value by 36 and 24 per cent respectively. Regarding other export competition measures, countries undertook to continue negotiations towards an Agreement to govern the use of officially supported export credits in agriculture.

– *Domestic support policies were disciplined according to three broad categories based on their potential to distort trade*. Developed countries agreed to reduce expenditures on trade-distorting domestic policies by 20 per cent, while developing countries agreed to a 13.3 per cent reduction. Expenditures on domestic programmes with minimal trade-distortion effects, those in the so-called "green box", are not subject to reduction commitments. Production-linked support under production limiting programmes is also exempted from the reduction commitments if they satisfy certain criteria ("blue box"). Moreover, domestic support is also exempted from reduction commitments if it is less than 5 per cent (10 per cent for developing countries) of the value of production ("*de minimis*").

– *A new Agreement on the Application of Sanitary and Phytosanitary Measures was signed*. It requires that measures to protect animal or plant life and health should have scientific justification and encourages countries to base them on international standards, guidelines and recommendations. When international standards do not exist or there is a preference for higher standards, countries should apply measures based on science or risk assessment, in order to avoid arbitrary or unjustified discrimination.

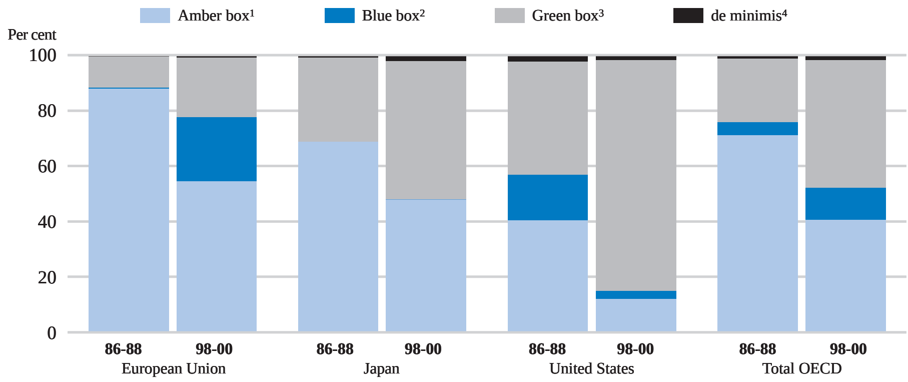
Table VII.1. **Average tariff in 2000 by in-, out- and non-quota products**[a]

	In-quota	**Out-of-quota** **Per cent**	**Non-quota**
Coarse grains	100	218	76
Wheat	73	184	84
Rice	15	198	54
Sugar	16	127	111
Beef	36	167	54
Pig meat	56	180	69
Poultry	39	172	49
Sheep meat	31	153	14
Butter	48	370	50
Cheese	32	121	26
Skim milk powder	48	192	92
Whole milk powder	80	261	112
Whey powder	38	546	129

a) In-quota refers to the tariff applied on imports within a tariff-rate quota; Out-of-quota refers to the tariff applied on imports in excess of the tariff-rate quota volume; and non-quota refers to the tariff applied to goods for which there is no set quota.

Source: OECD (2001*a*), OECD calculations based on the Agriculture Market Access Database.

Figure VII.5. **Composition of domestic support, 1986-88 and 1995-98**



1. Most trade-distorting form of support.
2. Intermediate category.
3. Least trade-distorting form of support.
4. Less 5% of total value of production.

Source: OECD (2001*b*).

The cost and effectiveness of agricultural policies

Agricultural support policies are rather costly…

Agricultural support policies remain quite costly. Looked at from the price side, support policies, and border measures in particular, have resulted in higher farm-gate prices, with consumers of agricultural products in the 1998-2000 period paying prices 46 per cent higher than in the world market (on average and across all commodities and OECD countries). Consumers in Japan, Korea, Norway and Switzerland paid on average more than twice the world price.[5] This cost bears most heavily on persons with low earnings, who generally spend a higher share of their incomes on food. Looked at from the angle of agricultural producers, support, including direct income support, has on average amounted to $258 billion a year between 1998 and 2000.[6] In the same period, total support to the sector, as measured by the total support estimate (TSE), which also includes support for general services to agriculture, amounted to $341 billion equivalent to 1.3 per cent of total OECD GDP (Table VII.2).[7] This cost of agricultural policies should be seen in the perspective of the small and declining share of the sector in economic activity in most OECD countries, although this share is much higher than the OECD average in some countries, like Korea, Mexico, Poland and Turkey, as well as in most of the non-OECD area.[8]

5. As measured by the Consumer Nominal Protection Coefficient, which is an indicator of the nominal rate of protection at the consumer level measuring the ratio between the average price paid by consumers (at the farm gate) and the border price (measured at a comparable level).
6. As measured by the Producer Support Estimate (PSE). See definition in Table VII.2.
7. On average, between 1998 and 2000, about 55 per cent of total support cost has been borne directly by consumers and the rest by public budgets.
8. In the late 1990s, agriculture represented on average about 7 per cent of employment, less than 4 per cent of GDP and less than 7 per cent of merchandise exports in the OECD area. On the other hand, agriculture accounts for between 10 and 12 per cent of GDP and merchandise exports of middle-income developing countries and as much as 25 to 30 per cent in the case of least developed countries.

Table VII.2. **OECD: Estimates of support to agriculture**

(US$ billion)

	1986-88	1998-2000	1998	1999	2000p
Producer Support Estimate (PSE)[a]	**236.4**	**257.6**	**253.7**	**273.6**	**245.5**
Market price support	182.4	170.2	170.1	182.1	158.4
Payments based on output	12.0	15.6	12.1	17.7	17.1
Payments based on area planted/animal numbers	15.6	29.3	30.6	29.4	27.8
Payments based on historical entitlements	0.5	12.6	10.6	13.5	13.6
Payments based on input use	20.1	21.3	21.8	22.4	19.6
Payments based on input constraints	3.1	6.3	6.5	6.3	6.2
Payments based on overall farming income	2.3	2.5	2.3	2.5	2.7
General Services Support Estimate (GSSE)[b]	**41.6**	**57.1**	**58.9**	**57.0**	**55.5**
Research and development	4.0	5.2	5.6	5.2	4.8
Agricultural schools	0.7	1.4	1.4	1.4	1.4
Inspection services	1.1	1.7	1.7	1.7	1.7
Infrastructure	12.6	18.3	20.4	17.5	17.2
Marketing and promotion	13.4	23.4	23.0	24.0	23.1
Public stockholding	7.7	3.3	3.4	3.3	3.2
Consumer Support Estimate (CSE)[c]	**–166.9**	**–158.4**	**–156.5**	**–171.7**	**–147.1**
Transfers to producers from consumers	–184.9	–168.4	–168.7	–181.8	–154.6
Other transfers from consumers	–14.3	–19.4	–18.9	–19.7	–19.6
Transfers to consumers from taxpayers	20.4	25.8	26.5	25.4	25.6
Excess feed cost	11.8	3.5	4.7	4.5	1.5
Total Support Estimate (TSE)[d]	**298.5**	**340.5**	**339.1**	**355.9**	**326.6**
Transfers from consumers	199.2	187.8	187.6	201.6	174.2
Transfers from taxpayers	113.6	172.1	170.3	174.1	172.0
Budgets revenues	–14.3	–19.4	–18.9	–19.7	–19.6
Memorandum items:					
Total value of production (at farm gate)	559.2	651.0	668.3	653.1	631.6
Total value of consumption (at farm gate)	528.5	598.0	605.4	600.2	588.3

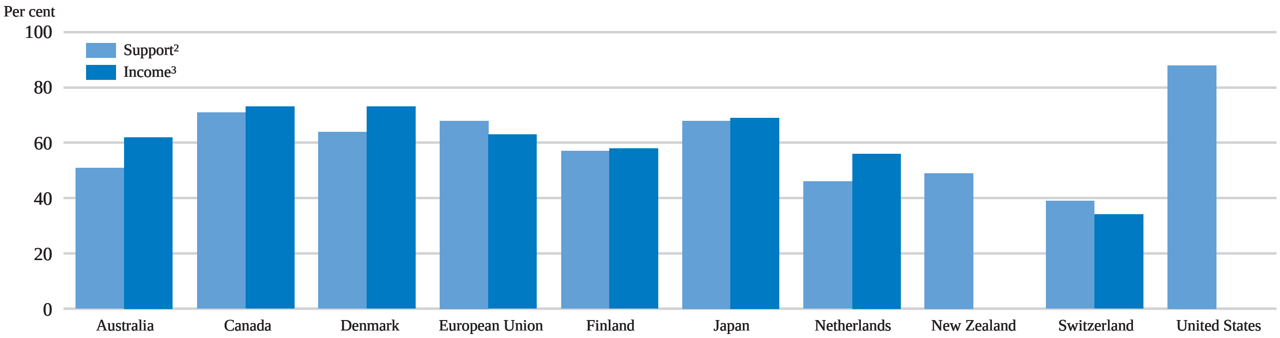
a) The PSE is an indicator of the monetary value of gross transfers from consumers and public budgets to agricultural producers, measured at the farm-gate level, arising from policy measures that support agriculture. It includes market price support and payments based on different criteria.
b) The GSSE measures gross transfers to services provided collectively to agriculture, for example research, marketing and infrastructure.
c) The CSE is an indicator of the annual monetary value of gross transfers to (from) customers of agricultural commodities, measured at the farm-gate (first consumer) level arising from policy measures which support agriculture. It includes transfers to (from) consumer from (to) producers and the public budget.
d) The TSE is an indicator of the monetary value of all gross transfers from consumers and public budgets arising from policy measures that support the agriculture sector, net of the associated budgetary receipts. When expressed as a percentage of GDP (per cent TSE), it gives an indication of the burden this overall support represents for the economy. The TSE comprises the PSE, the GSSE and part of the CSE (that related to budgetary transfers to the consumers of food products).
Source: OECD (2001*a*), PSE/CSE database 2001.

Beyond the direct observable cost, agricultural support policies pursued in OECD countries have caused distortions in the allocation of resources. Higher domestic prices have given incentives to retain more resources – land, labour and capital – in agriculture than would have been the case if farmers had faced world market prices – which some countries believe is justified on social grounds.

… and not very efficient in supporting farm income

In spite of the cost and the distortions they create, agricultural support policies in OECD countries are relatively inefficient in raising farm income, often a major objective. Production-linked support is largely capitalised into land (or other fixed asset) values, and has hindered structural adjustment and increased the costs of production and the cost of entry to new farmers. Indeed, price support measures, which currently account for over 70 per cent of support to producers, are rather inefficient in transferring income to farmers. It is estimated that the transfer efficiency of price support is around 25 per cent, meaning that $4 of price support only raises farm incomes by $1 (OECD, 1995*a*, 1995*b* and 1996). Indeed, while the policy objective of raising average farm household incomes to levels comparable to those in the rest of the economy has been achieved in many OECD countries, it is questionable

Figure VII.6. **Share of support and income received by the 25% largest farms**[1]



1. Based on gross sales. Data refer to 1994 for Japan, 1995 for the European Union and Switzerland, 1996 for Canada, Netherlands and the United States, and 1996/97 for Australia, Denmark and New Zealand.
2. Market price support plus budgetary payments.
3. Net operating income.

Source: OECD (1999).

whether this is a result of support policies. Farm households have diversified their sources of income and consequently in many countries farm revenue is not the main source of household income.[9] Finally, contrary to the popular view of agricultural policy providing support for the small family farm, in a number of countries it mostly benefits the larger farmers, often the most prosperous ones (Figure VII.6). This is because most policy measures are still strongly linked to production.

Side-effects of agricultural policies

Policies have affected international trade…

Agricultural support policies have had spill-over effects internationally, leading to heightened trade tensions. Trade barriers have restricted imports, while the subsidised exports of production surpluses distorted competition in world markets, driving down world commodity prices.[10] It is estimated that a 10 per cent reduction in support levels by OECD countries would lead to an average increase of 2.2 per cent in the international price of crops, benefiting exporting countries (OECD, 2001*b*).[11] It is

9. On a broad definition of farm households, farm income ranges from 4 per cent of total household income in the United States to 65 per cent in Australia. On a narrower definition, it ranges from 24 per cent in Sweden to 86 per cent in Germany. See OECD (1995*c*, 1998, 2000*a*, 2000*b*, 2001*b* and 2001*c*).
10. From being a beef and cereals importer in the 1970s, the European Union became the largest beef exporter and second largest cereal exporter by the 1980s. In the United States, high producer support prices acting as floor prices for cereals also expanded government stocks. In both cases, exports have been subsidised. The US commodity Credit Corporation provides loans to "participating farmers producing programme crops". The amount of the loan is calculated based on a crop price fixed ex-ante, which in practice acts as a floor price guarantee, since farmers have the choice to reimburse the loan or surrender the crop.
11. The OECD Policy Evaluation Matrix model has been used to estimate the impacts of a 10 per cent reduction in the support rates of the different categories of support to crop producers in six OECD countries and regions. Results indicate an estimated increase in the real incomes of the countries involved of $2.6 billion, or 1.7 per cent of initial farm revenues. It would also lead to an increase in the international price of agricultural commodities of 2.2 per cent. The Policy Evaluation Matrix (PEM) model is a partial equilibrium trade model for crops (wheat, coarse grains, oilseeds and rice) with a detailed representation of inputs and outputs market in six OECD countries: United States, Canada, Mexico, European Union (as a single country), Switzerland and Japan. It also has a specific modelling of most PSE categories of support.

true that some net food importers benefit from buying subsidised food, but these gains need to be set against the losses that have resulted from having local production systems undermined by the disposal of OECD-country surpluses (OECD, 2001*d* and 2001*e*). Despite recent reforms, agricultural policies in OECD countries continue to depress world prices, with domestic OECD producers remaining heavily insulated from international market signals (OECD, 2001*b*).

… and have had an impact on the environment

As a major user of natural resources, accounting for around 40 per cent of total OECD land use and 45 per cent of water use (over 60 per cent in nine countries), agriculture has a major influence on the environment. Although agricultural activity has contributed to providing environmental services, such as flood control, the negative impact of agriculture on the environment has generally predominated, to which government intervention has contributed. Policies, where they have encouraged production-enhancing farm practices, have increased production at the intensive and extensive margins, often accentuating overuse and pollution of water, soil erosion, and loss of wildlife, habitats and landscape features. The demand for water from agriculture has been increasing in many OECD countries, as the price of water paid by farmers is often substantially lower than that paid by industrial and household users. Agriculture is an important source of water pollution, accounting for as much as 40 per cent of nitrogen and 30 per cent of phosphate emissions in surface water in several countries. Pesticide and soil sediment run-off from agricultural land also impairs drinking water quality and harms water-based wildlife. More recently, many countries have introduced specific policy measures to reduce environmental damage or enhance environmental benefits, including through payments to farmers. However, as long as environmental payments add to rather than replace production-linked measures that are a source of environmental damage, the achievement of environmental objectives will be more costly and less certain than need be.[12]

Concluding remarks

Agricultural trade negotiations should be more inclusive of the needs of developing countries

"Overall, progress towards further policy reform agreed to by OECD Ministers has been insufficient and remains fragile" (OECD, 2001*a*). Agriculture remains an important policy concern and the continuation of reforms is necessary to make government intervention in the sector more effective and less costly and distortive. Multilateral trade negotiations underway at the WTO are a good opportunity in that regard. Trade policy reform – in conjunction and compatible with domestic policy reform – continues to be a major challenge facing OECD countries, particularly when market conditions falter. With the Uruguay Round Agreement on Agriculture, some progress was made in terms of reducing tariffs, export subsidies and the most trade-distorting domestic support policies. However, the implementation experience suggests that, overall, reduction in support and protection has been limited, largely because of weaknesses in certain specific features of the Agreement (OECD, 2001*b*, Diakosavvas, 2001). Continued reductions in domestic support, improved market

12. For elaboration of the points raised in this paragraph, see OECD (2001*a*, 2001*b*, 2001*f*, 2001*g*, 2001*h* and 2001*i*).

access and the tightening of the limits on export enhancement programmes are priorities on the trade reform agenda. In addition, a number of other concerns including notably non-trade issues will also need to be addressed. There is wide recognition, both in OECD and non-OECD countries, that the next Agreement must be more inclusive of the needs of developing countries. Liberalisation in agriculture is for many of them, an important objective in WTO negotiation. “Mutually supportive trade and domestic policies […] through innovative market-based and better targeted measures, and greater coherence among policies, would help to achieve desired outcomes with less distortions to agriculture production, consumption and trade” (OECD, 2001*a*).

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