What Could WTO Talks on Agricultural Domestic Support Mean for Least Developed Countries?
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<table>
<thead>
<tr>
<th>Abbreviation</th>
<th>Description</th>
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<tbody>
<tr>
<td>ACP</td>
<td>African, Caribbean and Pacific Group of Countries</td>
</tr>
<tr>
<td>AMS</td>
<td>Aggregate Measure of Support</td>
</tr>
<tr>
<td>C-4</td>
<td>Group of Four Cotton-Producing Countries</td>
</tr>
<tr>
<td>FAO</td>
<td>Food and Agriculture Organization of the United Nations</td>
</tr>
<tr>
<td>FAOSTAT</td>
<td>Food and Agriculture Organization of the United Nations, Statistics Division</td>
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<tr>
<td>G-10</td>
<td>Group of Ten</td>
</tr>
<tr>
<td>IFAD</td>
<td>International Fund for Agricultural Development</td>
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<tr>
<td>LDC</td>
<td>least developed country</td>
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<tr>
<td>MC11</td>
<td>WTO Eleventh Ministerial Conference</td>
</tr>
<tr>
<td>OECD</td>
<td>Organisation for Economic Co-operation and Development</td>
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<tr>
<td>UNICEF</td>
<td>United Nations Children’s Fund</td>
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<tr>
<td>WFP</td>
<td>World Food Programme</td>
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<tr>
<td>WHO</td>
<td>World Health Organization</td>
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<tr>
<td>WTO</td>
<td>World Trade Organization</td>
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FOREWORD

In recent decades, huge progress has been made throughout the world in lifting vast numbers of people out of poverty, creating jobs, and protecting our fragile planet. At the same time, however, millions of people still do not live dignified lives in which their basic needs are met and cannot be sure that their children and future generations will have a safe place to live where they can survive and prosper.

Since the Second World War, governments have collaborated to develop institutions and common legal frameworks which in retrospect can be seen to have provided the basis for the steady growth in prosperity that has since transformed so many people’s lives. In the area of trade, as elsewhere, the agreements that have emerged from this process have been far from perfect: indeed, they have often been unfair in important ways. At the same time, because they have built on a legal framework that is centred on principles of equal treatment and non-discrimination, they have nonetheless been widely seen to provide an enduring basis for closer economic integration between countries and world regions.

Despite recent achievements, there is no room for complacency. As climate change threatens to intensify the common challenges we face in the years ahead, countries will need to redouble these efforts to collaborate, rather than mistakenly assume that any one country can succeed alone. Working together across national borders will be critical for ensuring respect for fundamental rights and ensuring that people are free to live meaningful and fulfilling lives.

In September 2015, governments at the United Nations took a major step towards defining a common framework for future action when they adopted seventeen Sustainable Development Goals as part of the new Agenda 2030. Among other things, this included a commitment to end hunger and all forms of malnutrition by 2030. Better functioning markets for food and agriculture are integral to this bold new vision: governments agreed, for example, to “correct and prevent trade restrictions and distortions in world agricultural markets” as one of the measures they would take to help achieve this goal.

In December of the same year, members of the World Trade Organization (WTO) took an important step towards this objective when they agreed to eliminate agricultural export subsidies at the global trade body’s Nairobi ministerial conference. The agreement built on other recent developments at the WTO, such as the outcomes on trade facilitation and food security at the Bali ministerial conference two years previously.

Negotiators are now exploring options for further progress ahead of the December 2017 conference in Buenos Aires, Argentina. While the vast majority of governments has expressed a desire to see progress in addressing the trade distortions caused by agricultural subsidies, a few countries remain concerned about the impact of new commitments on their own domestic producers.

This paper therefore seeks to build on other recent work by the International Centre for Trade and Sustainable Development in this area by examining the implications of various negotiating options for the group of Least Developed Countries. As such, we hope it will represent a useful contribution to how governments can help to ensure that policies and rules affecting the global food system are equitable and sustainable, both in the run-up to the Buenos Aires ministerial conference and beyond.

Ricardo Meléndez-Ortiz
EXECUTIVE SUMMARY

Under the 2015 Sustainable Development Goals, governments agreed amongst other things to “correct and prevent trade restrictions and distortions in world agricultural markets,” as part of their efforts to end hunger and malnutrition by 2030. Following incremental progress towards this goal at the Nairobi ministerial conference of the World Trade Organization (WTO), governments have tabled a number of submissions suggesting different options for negotiating an outcome on agricultural domestic support at the global trade body’s eleventh ministerial conference in Buenos Aires (dubbed “MC11” by trade negotiators) and beyond.

This paper seeks to build on recent work by the International Centre for Trade and Sustainable Development in this area by examining the implications of various negotiating options for the group of Least Developed Countries (LDCs). It looks at historical and projected trends in LDC production, consumption, and trade to highlight products that are important to the group; reviews key elements emerging from negotiating submissions; and assesses how these proposals could affect products of specific interest to the LDCs.

The paper finds there is a clear need to address distortions in markets where trade is especially important to the LDC group as a whole, notably for cotton, but also for sugar and potentially other products of export interest in the broad category of fruit, vegetables, and nuts—such as for groundnuts or fresh vegetables like beans and peas. LDCs will also need to pay particular attention to the impact of distortions on markets such as rice, maize, and other coarse grains: for these, domestic production is very important, although imports are also projected to grow in the coming decade and markets for many of the products concerned remain highly distorted. Finally, attention must also be paid to import-competing products, especially where subsidised imports could threaten domestic employment: poultry seems to be particularly important among this set of products.

Trade-distorting payments by WTO members such as the EU and US have declined in recent years, due both to policy changes and rising domestic prices. At the same time, WTO notifications indicate that large emerging countries such as China and India have significantly increased their agricultural domestic support, while remaining below their existing support ceilings. Furthermore, although they are not major agricultural exporters, G-10 countries with highly-protected farm sectors—such as Japan and Switzerland—still provide significant applied levels of trade-distorting support. Although there are many ways in which WTO members could address the political sensitivities of countries that do provide trade-distorting support, LDCs would seem to benefit from disciplines addressing the concentration of product specific support on a limited set of products, as a complement to any new ceiling on overall trade-distorting support.

In the EU or Japan, product specific support represents over 80 percent of trade-distorting subsidies. For example, in the EU, trade-distorting domestic support for sugar corresponded to 20 percent of the value of production, on average, from 2008 to 2013. In certain years, this rose to 60 percent, or fell to zero. In the US, sugar support has varied between 40 and nearly 60 percent of the value of production, while averaging around 49 percent. Since new policy approaches were adopted in 2014, support has also been concentrated on a small set of products in the US, although to a lesser extent than in the EU. Although in Canada no product receives support exceeding 15 percent of the value of production, support in some G-10 members consistently surpasses 60 percent of the value of production and can reach 80 percent for poultry. In contrast, developing countries tend to provide non-product specific support, with this recently representing over 90 percent of trade-distorting support in India and Brazil. Indeed, the most recently available WTO notifications indicate that product specific support in
China, India, and other developing countries remains largely below 5 percent of the value of production.

The exact impact on LDCs of any new WTO rules in this area will depend on how products that matter to the group are affected. Overall, product specific support seems mostly to be concentrated on products such as pork, beef and poultry, and on dairy: these may not be critical for LDCs, with the possible exception of poultry. However, reductions in trade-distorting support for sugar or cotton could generate positive impacts for LDCs.

While governments in LDCs have considerable latitude to support agriculture and rural development by providing public goods such as rural infrastructure or extension and advisory services, reducing distortions in global markets could help incentivise future investment in the farm sector, at the same time reducing unfair competition in export markets for key products such as cotton. The relatively low level of export diversification in many LDCs suggests that it would be important for any WTO outcome to tackle specifically the problems relating to the products of greatest importance to this group of countries.

A negotiated outcome on agricultural domestic support at the WTO would also be important in helping to build consensus around the future direction of policies affecting markets for food and agriculture—not only by establishing agreement on how best to address past imbalances in permitted levels of trade-distorting support, but also in establishing a roadmap for further progress towards the objectives set out in *Agenda 2030*. Disciplines aimed at supporting the economic integration of LDCs should be a central feature of any such negotiated outcome.
1. INTRODUCTION

Under the 2015 Sustainable Development Goals, governments agreed amongst other things to “correct and prevent trade restrictions and distortions in world agricultural markets,” as part of their efforts to end hunger and malnutrition by 2030. Following incremental progress towards this goal at the Nairobi ministerial conference of the World Trade Organisation (WTO), governments have tabled a number of submissions suggesting different options for negotiating an outcome on agricultural domestic support at the global trade body’s eleventh ministerial conference in Buenos Aires (dubbed “MC11” by trade negotiators) or thereafter. Although different countries and negotiating groups have different objectives and levels of ambition for the conference and subsequent WTO work, many WTO members see it as an important opportunity to make progress on their long-term objective of “substantial progressive reductions in support and protection” set out in Article 20 of the Agreement on Agriculture, which envisages the establishment of a fair and market-oriented agricultural trading system, as well as to advance negotiations on the remaining Doha issues.¹

Over the course of 2016 and 2017, a number of new negotiating proposals and submissions have been put forward by WTO members, many of which focus specifically on the area of agricultural domestic support. Together, these submissions provide some indication of the possible contours of an eventual agreement in this area, and also greater clarity on the extent to which different countries’ negotiating positions converge or diverge. In January 2017, the Least Developed Countries (LDCs) tabled a negotiating proposal setting out their own goals for the talks, while in November 2016 negotiating submissions had also been tabled by the African, Caribbean and Pacific (ACP) group, Australia and six co-sponsors, and Brazil and six co-sponsors. More recently, in July 2017 a negotiating proposal was tabled by the EU, Brazil, and three co-sponsors, and another negotiating submission was put forward by India and China. These coincided with informal papers from the G-10 group of countries with highly-protected agricultural sectors (including Japan and Switzerland) and another from New Zealand and three other agricultural exporting nations.²

A number of questions emerge from the negotiating proposals that have been tabled so far. Should countries seek to establish an overall cap on trade-distorting agricultural domestic support, and if so how might this be defined? Should countries aim to establish any such limit as a fixed monetary value, or would it be better to agree to new “floating” ceilings that are linked to the value of agricultural production? Should countries take the existing framework of subsidy categories in the WTO Agreement on Agriculture as their starting point, or should they instead start afresh with a new approach? Ought countries aim to establish product specific caps aimed at preventing governments from concentrating trade-distorting support on a few agricultural products, and if so what might be the best way of achieving this? And at a more fundamental level, how can countries redress the historical imbalances in WTO rules while also establishing an equitable basis for farm trade in the future?

ICTSD has explored some of these questions in several analytical papers (ICTSD 2017a;

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¹ The WTO’s Doha Round of trade talks was launched in 2001, with goals that included achieving substantial reductions in trade-distorting domestic support. In 2015, at the WTO’s Nairobi ministerial conference, ministers recognised that not all members reaffirmed the Doha mandates, but expressed the strong commitment of all members to advance negotiations on the remaining Doha issues.


³ These negotiating proposals are described in more detail in articles published by ICTSD (2017c, 2017b, 2016c, 2016b), and also in the sections below.
Greenville 2017); it has also looked into the separate but related issue of public stockholding for food security purposes and possible options that WTO members could explore in their search for a “permanent solution” to the challenges some countries face in buying food at minimum prices under existing WTO farm subsidy rules (ICTSD 2016a). This paper seeks to supplement and build on this analysis by exploring how various negotiating options could affect the group of states classed as “least developed countries” (LDCs) by the United Nations.⁴

The paper starts by examining recent and anticipated evolutions in LDCs’ production, consumption, and trade patterns to highlight key products of interest to the LDCs as a group from either a defensive or offensive perspective. To undertake this analysis, we look at present and trends projected by the Food and Agriculture Organization of the United Nations (FAO) and Organisation for Economic Co-operation and Development (OECD) for the next 10 years as presented in the OECD/FAO Agricultural Outlook Database (n.d.). Based on these considerations, the paper then reviews some of the key elements emerging from the submissions tabled in the negotiations and assesses how such proposals may affect products of specific interest to the LDCs.

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⁴ The FAO, International Fund for Agricultural Development (IFAD), World Food Programme (WFP), United Nations Children’s Fund (UNICEF), and World Health Organization (WHO) report that 815 million people were undernourished in 2016. The agencies also estimated that an average of 789 million people were undernourished in the 2014-16 period, of whom 232 million live in LDCs, according to the agencies’ flagship report The State of Food Insecurity and Nutrition in the World 2017. This also indicates that China and India alone are home to 135 million and 191 million undernourished people respectively.
2. CHARACTERISING PRODUCTION, CONSUMPTION, AND TRADE ACROSS DIFFERENT LDC COMMODITY MARKETS

The impact of global trade distortions for food and agricultural products on LDCs is complex, and may vary in important ways across countries within the group, as well as affecting different constituencies (such as rural and urban groups) in different ways. Furthermore, interactions between different categories of products—such as between livestock products and grains that are used as feed—can make it hard to draw straightforward conclusions about how negotiating options will affect the group as a whole.

Nonetheless, a number of overall trends affecting the group can be identified. Data from the OECD/FAO Agricultural Outlook show that, for many product groups, production in LDCs is set to grow rapidly over the coming decade, but that consumption is due to increase at an even faster rate—meaning that a growing level of imports will be needed to meet the expected demand growth arising from the combination of population growth and rising average incomes. Nonetheless, the relationship between production, consumption, and trade varies considerably by commodity and product group.

Overall it is possible to characterise these as falling into three major groups. First, we examine products for which both exports and imports are large compared to production and consumption levels. This is the case, for example, for cotton or sugar cane—but also for coffee or tobacco, to name but a few. A second group of products involve commodities such as maize, rice, and oilseeds, but also beef, pig meat and sheep meat, and roots and tubers, where consumption and production remain much higher than trade. Finally, a third category includes products for which LDCs are large net importers with imports in fact exceeding domestic production in several cases and exports being marginal to non-existent. Examples of products in this group are poultry, wheat, or soybeans. The following sections explore these different categories in more detail.

2.1. Products for which Trade Is Important Compared to Overall Production and Consumption Levels

This category includes products where both imports and exports represent a large share of domestic production and consumption. In the case of cotton, for example, FAO and OECD data presented in Figure 1 suggest that imports and exports will remain significant compared to production and consumption levels; some LDCs such as Bangladesh are likely to remain significant cotton importers, and others, such as Burkina Faso, important exporters. Similarly, although sugar consumption in the LDC group is expected to grow over the coming decade, sugar production is also due to remain high and indeed to grow significantly (see Figure 2). Although total sugar exports are projected to fall over the coming decade, trade will still remain important for the LDCs for both cotton and sugar in the years ahead.5

Many of the most important LDC exports are, however, not fully covered by the OECD/FAO Agricultural Outlook, which is based on a data set that excludes categories such as fruit, vegetables, and nuts. Table 1 provides a more detailed overview of top LDC agricultural exports in 2013, highlighting among other things the role of coffee, sesame seed, tobacco, beans, or vegetables as significant export products for the group. Trade distortions resulting from government policies such as agricultural domestic support may not be a significant challenge for some of these export products, such as spices, although tariff escalation on processed products may affect markets such as coffee, tea, and cocoa. However, for some exporting countries, such as Ethiopia and Uganda, distortions on markets...
for fruit and vegetables may be significant, while the same measures could adversely affect the extent to which consumers are able to access the diversity of food they need for an adequate diet. Trade-distorting agricultural domestic support may be one of the factors affecting how markets function for these products, together with quality and food safety issues including private standards. Similarly, domestic support for various types of nuts may also affect countries for which products such as groundnuts or cashew nuts are important, such as Malawi, Senegal, or Tanzania.
The situation is clearer for cotton and sugar, mentioned above, which are traded on heavily distorted global markets (Greenville 2017). Trade distortions affecting markets for cotton have long been an issue raised by LDCs at the WTO, especially the West African “C-4” group of cotton producing countries, who have argued in particular that farm subsidies by richer countries undermine the livelihoods of poor farmers in the C-4 (Townsend 2016, Lau et al. 2015). According to FAO data, cotton production remains important in a number of LDCs, including in the C-4 countries (Burkina Faso, Mali, Benin, and Chad), but also in Myanmar, Sudan, Tanzania, and Malawi. Data from 2013 indicate that cotton exports were particularly important in Burkina Faso, amounting to US$438 million, in Mali (US$296 million), Benin (US$234 million), and Mozambique (US$100 million). On the other hand, cotton imports were disproportionately significant in Bangladesh, with its important textiles sector (US$1.258 billion in 2013).

<table>
<thead>
<tr>
<th>Rank</th>
<th>Product Description</th>
<th>Value (US$1,000)</th>
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<tr>
<td>1</td>
<td>Coffee, green</td>
<td>1,635,601</td>
</tr>
<tr>
<td>2</td>
<td>Cotton lint</td>
<td>1,457,288</td>
</tr>
<tr>
<td>3</td>
<td>Sesame seed</td>
<td>1,382,598</td>
</tr>
<tr>
<td>4</td>
<td>Tobacco, unmanufactured</td>
<td>1,312,942</td>
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<tr>
<td>5</td>
<td>Beans, dry</td>
<td>1,279,949</td>
</tr>
<tr>
<td>6</td>
<td>Crude materials</td>
<td>909,353</td>
</tr>
<tr>
<td>7</td>
<td>Vegetables, fresh nes*</td>
<td>635,923</td>
</tr>
<tr>
<td>8</td>
<td>Sheep</td>
<td>620,313</td>
</tr>
<tr>
<td>9</td>
<td>Cattle</td>
<td>493,949</td>
</tr>
<tr>
<td>10</td>
<td>Cashew nuts, with shell</td>
<td>490,693</td>
</tr>
<tr>
<td>11</td>
<td>Sugar Raw Centrifugal</td>
<td>490,429</td>
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<tr>
<td>12</td>
<td>Cotton, carded, combed</td>
<td>458,558</td>
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<tr>
<td>13</td>
<td>Rubber natural dry</td>
<td>371,862</td>
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<td>14</td>
<td>Tea</td>
<td>351,985</td>
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<td>15</td>
<td>Maize</td>
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<td>16</td>
<td>Sugar refined</td>
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<td>17</td>
<td>Beverages, distilled alcoholic</td>
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<td>Flour, wheat</td>
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<td>Oil, palm</td>
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<td>Food prep nes*</td>
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<td>21</td>
<td>Goats</td>
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<td>22</td>
<td>Cloves</td>
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<tr>
<td>23</td>
<td>Cocoa, beans</td>
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<tr>
<td>24</td>
<td>Cigarettes</td>
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<td>25</td>
<td>Jute</td>
<td>155,239</td>
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<tr>
<td>26</td>
<td>Groundnuts, shelled</td>
<td>110,675</td>
</tr>
<tr>
<td>27</td>
<td>Beverages, non-alcoholic</td>
<td>110,606</td>
</tr>
</tbody>
</table>

Source: Food and Agriculture Organization of the United Nations, Statistics Division (FAOSTAT)
* Note: “nes” = not elsewhere specified.
2.2. Products for which Domestic Production and Consumption Continues to Dwarf Trade

As illustrated in Figures 3 to 6, this category includes products such as rice, maize, other coarse grains, and beef and veal. Annex 1 gives additional data for products such as other oilseeds, pig meat, molasses, sheep meat, and roots and tubers.\(^6\)

Rice, wheat, and maize are therefore likely to be especially significant, in volume terms, for both production and trade in LDCs in the decade ahead—along with “other coarse grains” (a category including products such as sorghum, barley, and millet).

While other product groups such as beef and veal can also be included under this category, their importance to the LDC group as a whole is significantly lower than for the cereals mentioned above (see Figure 7).

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Figure 3: LDCs’ cotton exports (US$1,000) (2013)

![Graph showing cotton exports by country]

**Source:** FAOSTAT

Figure 4: LDCs’ production, consumption, and trade in rice

![Graph showing production, consumption, imports, and exports of rice]

**Source:** OECD/FAO Agricultural Outlook Database

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\(^6\) Categories used here are those applied by the OECD/FAO Agricultural Outlook.
Figure 5: LDCs’ production, consumption, and trade in maize

Source: OECD/FAO Agricultural Outlook Database

Figure 6: LDCs’ production, consumption, and trade in other coarse grains

Source: OECD/FAO Agricultural Outlook Database

Figure 7: LDCs’ production, consumption, and trade in beef and veal

Source: OECD/FAO Agricultural Outlook Database
For products in this category, for which trade represents only a relatively small share of overall production and consumption, it may be the case that domestic producers and consumers in most LDCs will remain relatively insulated from global markets, with transport costs and other factors more important in determining prices on domestic markets. In these cases, reforms to agricultural domestic support in other WTO members may have a relatively small impact on the LDC group as a whole. On the other hand, the fact that these goods are produced in LDCs in relatively significant amounts implies that they may play a critical role from a food security, livelihood, or rural development perspective. By reducing trade distortions, new disciplines would reduce the risk that these products are dumped on world markets, thereby generating unfair competition for local producers in LDCs.

From a more offensive perspective, it is important to recall that aggregate data for the LDC group as a whole may disguise important differences between countries. For example, although rice is a particularly thinly traded commodity, distortions in global rice markets may disproportionately affect countries such as Cambodia, for which rice exports are relatively important. Similarly, distortions in global maize markets may adversely affect Zambia, as the most significant LDC maize exporter—although segregated markets for white and yellow maize may mitigate the extent to which this is actually the case. Distortions in global markets also need to be addressed so as to help tackle the long-term causes of low productivity and underinvestment in LDCs, as the group’s negotiating proposal from January 2017 notes (ICTSD 2017c).

2.3. Products for which Exports Remain Small, but Imports Are Expected to Grow Quickly

This category includes products for which imports are expected to grow quickly but remain lower than production as is the case with poultry meat (Figure 8) and protein meals (Annex 1). It also includes others for which imports are expected to continue outstripping production, like wheat (Figure 9), soybeans (Figure 10), and vegetable oils (Annex 1).

For some product categories, such as dried distillers’ grains, projections indicate that all consumption needs will be met by imports, with no domestic production taking place within LDCs (see Annex 1). These grains are a very close substitute for maize and other feeds in many developing countries and imports tend to compete directly with domestic feed production.

Figure 8: LDCs’ production, consumption, and trade in poultry meat

![Figure 8](source: OECD/FAO Agricultural Outlook Database)
For some of these products, domestic producers may therefore face growing competition from abroad—including in sectors where agricultural domestic support overseas contributes to distortions in international markets. For example, poultry meat is one of eleven product groups identified as being especially affected by trade distortions in the analysis by Greenville (2017). In these cases, governments will need to evaluate carefully the relative merits of ensuring that domestic consumers are able to access these products at affordable prices with the need to ensure that producers can compete fairly, especially where the sector concerned is important in supporting domestic employment or contributing to other public policy objectives.

Furthermore, exports of some of these products tend to be highly concentrated among a limited number of producers, making importers highly vulnerable to market conditions and policies prevailing in just a few countries.

In summary, LDCs will need to consider in particular how any overall cap on trade-distorting support and product specific support limits will affect products of particular importance to them, taking into consideration both similarities and differences across countries within the group as a whole. There appears to be a clear need to address distortions in markets where trade is especially important to the group as a whole, notably for cotton, but also for sugar and potentially also...
for other products of export interest within the broad category of fruit, vegetables, and nuts—such as for groundnuts or fresh vegetables such as beans and peas. At the same time, LDCs will need to pay particular attention to the impact of distortions in markets such as rice, maize, and other coarse grains: for these, domestic production is extremely important, although imports are also projected to grow over the coming decade, and markets for many of the products concerned remain highly distorted. Finally, attention needs to be paid to import-competing products, especially where subsidised imports could threaten domestic employment: poultry would seem to be particularly important among this set of products.
3. IMPLICATIONS FOR WTO NEGOTIATIONS ON TRADE-DISTORTING AGRICULTURAL DOMESTIC SUPPORT

3.1. What Are LDCs Proposing for MC11 and Beyond?

In its January 2017 negotiating submission, the LDC group has set out the outcomes they are seeking for the talks on agricultural domestic support, with a set of objectives for MC11 placed in the context of the group’s longer-term negotiating goals. The issues addressed by the group bear a number of similarities to those put forward by other WTO members and negotiating groups in the talks to date.

In summary, the group has argued that by MC11 countries should agree to establish a limit on trade-distorting domestic support, composed of:

- trade-distorting “amber box” payments, calculated using the Aggregate Measure of Support (AMS) set out in Annex 3 of the WTO Agreement on Agriculture;
- production-limiting “blue box” payments, allowed under Article 6.5 of the same agreement; and
- “de minimis” support, i.e. trade-distorting support which falls below a threshold defined as a share of the value of production, under Article 6.4 of the Agreement on Agriculture.\(^7\)

The group has also proposed that, by MC11, WTO members agree limits on product specific AMS, especially on products of particular interest to LDCs. In particular, they would like to see agreement on limits on trade-distorting support for cotton, expressed either as: a fixed monetary limit; a percentage of the value of cotton production; a percentage of all product specific support; or a percentage of producers’ revenue.

In the longer-term, the group argues in favour of a binding cap on trade-distorting support (amber box, blue box, and de minimis support); an elimination of product specific support that exceeds de minimis levels; and a progressive decrease in permitted levels of trade-distorting domestic support levels. Furthermore, the group has said that WTO members ought to clarify the criteria and disciplines for “green box” support (which is required to cause no more than minimal trade-distortion under WTO rules); provide special and differential treatment for developing countries, including exemptions from commitments for LDCs; and agree to significant reductions on trade-distorting support for cotton, with a view to its total elimination.

3.2. What Are Other WTO Members Proposing?

With the exception of the US, most major economies and negotiating coalitions have now put forward submissions indicating their preferred outcomes from the talks on agricultural domestic support. In some cases, these have been presented in the form of a clear negotiating proposal, as in the case of the EU-Brazil submission; in others, countries’ negotiating positions have become apparent through a series of informal papers or statements. While a number of agricultural exporting countries have co-sponsored various papers with Australia and New Zealand, the set of co-sponsors has changed over time.

These proposals reveal some similarities in negotiating positions adopted by countries and groups which otherwise have conflicting stances, as well as divergences between countries and groups that might be considered to have broadly similar objectives in the talks. These include differences between countries that have an overall export orientation; differences between sets of food-importing countries; differences

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\(^7\) These are set at 5 percent of the value of production for both product specific and non-product specific support in developed countries, with most developing countries allowed twice this limit. China has agreed to a limit of 8.5 percent instead.
in perspectives between groups of developed countries, and also between groups of developing countries.

One important difference in approach is between countries that consider that negotiations ought to begin from the starting point of the existing “architecture” in the Agreement on Agriculture, such as the G-10, and others that would prefer to move to a new framework based around the value of agricultural production, such as that put forward in the EU-Brazil proposal. While the China/India submission calls for the elimination of AMS allowances as a precondition for further talks, it would also have the effect of leaving countries with a value of production based metric as the yardstick for disciplining future trade-distorting domestic support.

Agricultural exporting countries have expressed divergent views on whether trade-distorting support ought to be subject to a fixed cap, defined in monetary terms (e.g. as a US$ value), or whether instead it should be subject to a floating cap, based on the value of production. The former approach is preferred by Australia and New Zealand, while other countries such as Brazil and Colombia have expressed their preference for the latter. G-10 countries have also suggested that a new limit based on AMS and de minimis entitlements could be converted into a fixed monetary equivalent. The EU-Brazil proposal furthermore appears to anticipate that requiring countries to notify their value of production could incentivise greater transparency around countries’ use of trade-distorting domestic support programmes.

With the exception of cotton, the EU-Brazil proposal is silent on the issue of product specific caps or anti-concentration measures. However, a number of other countries have argued that this should be an important outcome of the negotiations: Australia and New Zealand have raised the issue in various negotiating submissions, while China and India devote considerable attention to the question in their informal paper. The LDC group sees this as an important deliverable for MC11, also highlighting the importance of cotton, while the ACP group suggests that this aspect should be part of the longer-term objectives for the talks. Only the G-10 group expresses outright opposition to pursuing negotiations in this area.

Although use of blue box support has declined significantly among most major economies, it arguably remains important in some smaller, highly-protected economies—including in many G-10 members. While the EU-Brazil proposal anticipates that this area will be addressed in a second stage of talks leading up to the twelfth ministerial conference in 2019, the LDCs propose including this category in a new ceiling on trade-distorting support to be established in Buenos Aires. Different views also exist on the input and investment subsidies that developing countries alone are allowed to provide to low-income, resource-poor producers under Article 6.2 of the Agreement on Agriculture: while Australia and New Zealand would like cuts to this support category, the ACP group are explicitly opposed to doing so. On green box support, while LDCs have proposed clarifying the criteria and disciplines in this area in talks after MC11, other countries have not highlighted this area in their submissions.

Unlike other negotiating submissions, the EU-Brazil proposal links talks on future domestic support disciplines to the issue of public stockholding for food security purposes, although some developing countries have said they are opposed to making connections between these negotiating areas. In Nairobi, trade ministers agreed to pursue negotiations in “dedicated sessions” on the issue, with a view to establishing a permanent solution to the problems countries face in this area. The G-33 coalition, which includes countries such as China, India, and Indonesia, have argued for greater flexibility in this area, and have proposed that food bought at minimum prices should be exempt from WTO ceilings on trade-distorting support. However, exporting countries such as Australia remain concerned that these programmes could distort global markets; some developing nations, such as Pakistan, have also cautioned that exports of subsidised food could also undermine their own producers’ livelihoods and food security. While agricultural exporters in the Cairns Group would
prefer any “permanent solution” to build on the agreement that was reached at the WTO’s Bali ministerial conference in 2013, the EU-Brazil proposal envisages a new approach that would offer additional flexibility for new schemes, so long as the value of stocks procured is less than ten percent of the value of production.

The ACP, LDCs, and the co-sponsors of the EU-Brazil proposal all propose different types of roadmaps for the post-MC11 negotiations, which vary depending on their objectives for the Buenos Aires talks and their expectations of what can be accomplished in the longer term. However, with little clarity on whether or how the US will engage in negotiations in this area, some type of work programme that will allow members to address unfinished business is increasingly considered by many observers to be a likely outcome of the ministerial conference.
4. IMPLICATIONS OF CURRENT PROPOSALS FOR LDCs

4.1. An Overall Cap Is Unlikely to Affect Applied Levels in Major Agricultural Exporters

As highlighted above, discussions so far have mainly focused on whether an overall cap should be introduced and, if so, how such a cap should be defined (e.g. a fixed limit expressed in monetary terms or a floating one based on the value of production). Besides these elements, the submissions currently on the table do not propose any specific reduction commitment, nor do they indicate where to set a possible new limit on domestic support. The only exception is arguably the proposal from China and India, which calls for the total elimination of existing AMS entitlements for developed countries. Under such a proposal, the de minimis limit would de facto become the overall ceiling, at least in the first instance. Besides this proposal, and in the absence of any other indication of the magnitude of potential cuts in domestic support, assessing the impact of the various options proposed so far remains highly speculative. The reason for this is that a limit set at 10 percent of the value of production will have a significantly different effect from a limit set at 2 percent.

Keeping this caveat in mind, one can nonetheless make a few general observations. First, assuming that WTO members decide to establish a new overall limit on trade-distorting support, it can reasonably be expected that this ceiling would not significantly affect existing domestic support programmes in major agricultural producing and exporting countries, at least in the short term.

In the case of large developed members such as the EU or the US, trade-distorting payments have been declining gradually in recent years. This is partly explained by policy changes, but also by rising prices. For example, successive reforms in the EU have shifted subsidies from the amber box to the green box, by replacing price support with more decoupled income support payments. In the case of the US, total payments have fallen as world prices increased, triggering lower levels of support under programmes such as countercyclical payments. As a result, support levels in the EU and US today are well below the maximum allowed under existing WTO rules. Large emerging countries, on the other hand, have significantly increased the amount of domestic support they provide to agriculture, but according to their latest WTO notifications, they remain largely below the limits imposed by the agreement (or in the case of China, the accession protocol).

That said, several members, including net food importing countries from the G-10 such as Japan, Norway, Switzerland, or Iceland, continue to maintain significant amounts of support with much less leeway to reduce their existing entitlements without affecting their applied levels of support. In this context, any new ceiling on trade-distorting support would have to be set at a fairly low level to constrain applied levels of support in large agricultural producers and exporters such as the EU and US, but also India or China. Such reductions would be unlikely to achieve consensus among members in the current political environment. They would also imply significant reductions in applied levels of support in G-10 members—a highly sensitive political issue in these countries.

To illustrate this point, Figures 11 and 12 test some of the ideas contained in recent submissions by looking retroactively at the evolution of non-green box support in 14 developed and developing members since 2008. Figure 11 envisages a new overall limit defined as a percentage of the value of production as suggested in the EU–Brazil proposal. In this scenario, however, the limit applies not only to AMS and de minimis support but also to the blue box. It is arbitrarily set at 5 percent of the current value of production. Such an approach would not only eliminate all AMS entitlements as envisaged under the India and China proposal but would also cut the existing de minimis entitlement by half, making it a relatively ambitious scenario.
Figure 11: Implications for developed countries of a ceiling on non-green box domestic support set at 5% of the value of production

Source: Authors’ elaboration based on WTO notifications

Figure 12: Implications for developing countries of a ceiling on non-green box domestic support set at 10% of the value of production

Source: Authors’ elaboration based on WTO notifications
As shown in Figure 11, such an approach, although ambitious, would not imply any cuts in the current level of support provided by the EU, the US, the Russian Federation, or Canada. At the same time, it would require significant cuts in the support provided by Japan, Switzerland, and Norway. In other words, it would significantly constrain G-10 countries which are not large agricultural exporters, but would not result in any effective cuts among large players. Such a move would still contribute to reducing trade distortions on global agricultural markets. It could be argued, for example, that if Japan cuts its domestic support for rice, this would open up export opportunities for rice exporting LDCs in the region, such as Laos, Cambodia, or Myanmar. Such effects would, however, appear limited to a handful of countries, with relatively small effects on LDCs as a group, at least in the short term. When looking at developing countries, the scenario also envisages the removal of AMS entitlements and a reduction of the de minimis entitlement by half. Here again, such a scenario might appear to some to be ambitious, but it is also worth noting that this new limit would not imply any effective cuts in applied levels of support.

Figure 13 undertakes a similar exercise but this time, instead of applying a floating limit defined as a percentage of the value of production, we consider a fixed numerical limit expressed in monetary terms as envisaged in the Australia and New Zealand submission. To illustrate this option, Figure 13 shows AMS, de minimis, and blue box support in monetary terms converted into US$ for the sake of comparison. In this scenario the limit was set for developed members as 5 percent of the average value of production during the 2008-2010 period and 10 percent for developing countries. This approach would be more constraining for members whose value of production is expected to grow over time, and arguably less constraining for countries expecting a stagnant or even declining value of production (as may be the case for some G-10 countries). The results are nonetheless not significantly different from the first scenario, although Canada would see the new cap affecting its applied level of support under this approach. None of the developing countries analysed here would need to reduce their existing support, nor would the EU, US, and Russian Federation. However, as with the first scenario, G-10 countries including Japan, Norway, and Switzerland would be disproportionately affected.

**Figure 13: Implications for developed countries of a fixed monetary limit on AMS, de minimis, and blue box in billion US$**

<table>
<thead>
<tr>
<th>Year</th>
<th>EU</th>
<th>US</th>
<th>Japan</th>
<th>Russia</th>
<th>Canada</th>
<th>Switzerland</th>
<th>Norway</th>
</tr>
</thead>
<tbody>
<tr>
<td>2008</td>
<td>25</td>
<td>20</td>
<td>10</td>
<td>5</td>
<td>5</td>
<td>2</td>
<td>2</td>
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<tr>
<td>2009</td>
<td>20</td>
<td>15</td>
<td>8</td>
<td>4</td>
<td>4</td>
<td>2.5</td>
<td>2</td>
</tr>
<tr>
<td>2010</td>
<td>15</td>
<td>10</td>
<td>6</td>
<td>3</td>
<td>3</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>2011</td>
<td>10</td>
<td>5</td>
<td>5</td>
<td>2.5</td>
<td>2.5</td>
<td>1.5</td>
<td>1.5</td>
</tr>
<tr>
<td>2012</td>
<td>5</td>
<td>2.5</td>
<td>2.5</td>
<td>1.25</td>
<td>1.25</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>2013</td>
<td>2.5</td>
<td>1.25</td>
<td>1.25</td>
<td>0.625</td>
<td>0.625</td>
<td>0.5</td>
<td>0.5</td>
</tr>
<tr>
<td>2014</td>
<td>1.25</td>
<td>0.625</td>
<td>0.625</td>
<td>0.3125</td>
<td>0.3125</td>
<td>0.25</td>
<td>0.25</td>
</tr>
</tbody>
</table>

Source: Authors’ elaboration based on WTO notifications
There are many ways to address the sensitivities of G-10 members or some developing countries. Members could apply different limits based on certain criteria such as the absolute amount of support provided or the extent to which a member is a large producer or exporter of agricultural products. Similarly, one could envisage options combining both floating and fixed limits, or different levels over time. However, the fact remains that existing levels of domestic support in the EU, US, and in most developing countries remain largely below current limits, and members are unlikely to agree, at least in the short term, on a new ceiling which would imply effective cuts in applied levels. In short, any agreement on a new overall limit will most probably not have significant immediate impacts on LDCs’ export opportunities. This is not to say that such an outcome is undesirable. Even if such a new limit does not affect applied levels of support, it would still constitute a critical insurance mechanism to consolidate past reforms and prevent significant increases in the level of support in the future. It could also constitute a first incremental step on which to build in future negotiations.

In this respect, and from a more defensive perspective, an important consideration is the extent to which possible new disciplines would affect LDCs’ ability to support agricultural production and productivity, including through measures considered as trade-distorting subsidies under the WTO Agreement on Agriculture. A review of LDCs’ notifications unsurprisingly reveals very small levels of support—a situation which largely reflects existing financial constraints faced by the poorest WTO members. Furthermore, where such support exists, it essentially consists either of green box measures or non-product specific input or investment subsidies provided to low-income and resource poor producers, falling under Article 6.2 exceptions. As long as such programmes are not questioned by members, future disciplines would most probably not affect existing support schemes in LDCs. Finally, most WTO members seem ready to exempt LDCs completely from any new commitments under future disciplines, as reflected in some of the submissions tabled so far. All these elements should enable LDCs to focus more specifically on their offensive interests in this area.
4.2. Product Specific Disciplines as the Decisive Factor

While the notion of an overall limit on trade-distorting support would only impose limited constraints over time, product specific disciplines could offer greater opportunities to reduce applied levels of trade-distorting support. This is particularly relevant when trade-distorting domestic support is highly concentrated on a few products as is notably the case in the EU or Japan, where over 80 percent of trade-distorting subsidies are granted in the form of product specific support. Support is concentrated on a small set of products in the US, but to a lesser extent since the 2014 Agriculture Act, under which Washington decided to provide more of its support through subsidised crop insurance schemes which are considered as non-product specific support. In contrast, developing countries tend to provide non-product specific support. This is particularly the case in India or Brazil, where over 90 percent of the support in recent years was provided as non-product specific payments.

While these patterns may be linked to domestic factors, arguably existing WTO disciplines, and particularly AMS entitlements, have reinforced this trend by allowing certain members—mostly developed countries—to provide large amounts of product specific support on a limited number of products. On the other hand, since most developing countries do not have AMS entitlements, they cannot provide product specific amber-box support above their de minimis level, corresponding to 10 percent of the value of production of the product concerned.

To identify products where such support is concentrated, Figure 15 analyses product specific support in 10 developed and developing country members. For each product, the graph shows the average amount of support provided as a percentage of the value of production since 2008, including the maximum and minimum level occurring during this period. For example, it shows that trade-distorting domestic support provided to sugar in the EU corresponded, on average, to 20 percent of the value of sugar production between 2008 and 2013. In certain years, this support went up to 60 percent but has been as low as zero in others (particularly since the EU reformed its sugar policy). In the US, support for the same product varied between 40 and nearly 60 percent of the value of production, with an average level of support around 49 percent of the value of production.

Since AMS entitlements allow certain members to exceed their product specific de minimis limit, it is not surprising to see that much larger levels of support are prevalent in countries with such entitlements. While in Canada this support does not exceed 15 percent of the value of production for any given product, in some G-10 members—such as Japan or Switzerland—support provided consistently reaches above 60 percent of the value of production, and up to 80 percent in the case of poultry. In contrast, product specific support provided in developing countries including India and China remains largely below 5 percent of the value of production according to most recent notifications.

New product specific limits may well constrain applied support levels, particularly in developed countries. Such limits could be expressed either as a fixed amount, as a certain percentage of the value of production, or even as a share of total trade-distorting support allowed under an overall cap. While such limits remain controversial in WTO negotiations, for LDCs these disciplines could be considered most likely to deliver effective cuts in applied levels of support. The exact impact of any such disciplines will, however, depend on the extent to which they affect products of particular interest to LDCs, such as those defined in section 2 above.
Overall, Figure 15 suggests that product specific support tends to be concentrated mainly on meat products such as pork, beef and poultry, and on dairy. As highlighted above, these may not be the most critical products for LDCs, with the exception of poultry meat. On the other hand, reductions in support provided to sugar or cotton may generate positive impacts for LDCs.

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8 It could be argued on the contrary that subsidised poultry exports to LDCs are beneficial for poor urban consumers in these countries who would not otherwise be able to afford the more expensive poultry produced domestically.
5. CONCLUSION: AN MC11 OUTCOME THAT CONTRIBUTES TOWARDS FAIRER TRADE IN FARM GOODS

Developing country members of the WTO have long argued that current global rules on agricultural trade are unfair, insofar as they grant countries that historically provided large amounts of trade-distorting support the flexibility to continue doing so in the future. At the same time, exporting countries are concerned that ceilings on trade-distorting support in large developing countries are effectively being eroded over time as the value of these nations’ farm output grows in response to steadily rising demand. Any outcome on agricultural domestic support at MC11 will need to ensure that concerns about historical imbalances in past levels of trade-distorting support are reconciled with the need to ensure an equitable and sustainable basis for farm trade in the future.

As the total volume of trade between developing countries continues to grow, economic actors in different parts of the developing world stand to gain from reforms of the global trading system that have the effect of reducing trade distortions and improving the functioning of global markets. Competitive agricultural producers in exporting countries, such as those in Latin America, have been among those arguing forcefully for an update to global rules in this area. However, with incomes rising across the developing world, poor consumers in food-importing countries ought also to benefit from disciplines on the types of support that most heavily distort markets and trade, along with those who rely on imports of farm goods to make other products (Yu 2017).

LDCs face particular challenges in the years ahead. Not only are many of these countries net food-importers, many of them are also effectively marginalised in the global trade system, and frequently face deep-seated structural challenges. While governments in these countries have considerable latitude to support agriculture and rural development through the provision of public goods such as rural infrastructure or extension and advisory services, reducing distortions in global markets could help incentivise future investment in the farm sector, at the same time reducing unfair competition in export markets for key products such as cotton. The relatively low level of export diversification in many LDCs suggests that it would be important for any WTO outcome to tackle specifically the problems relating to the products of greatest importance to this group of countries, in addition to setting an overall ceiling on permissible levels of trade-distorting support.

Bouët and Laborde (2017) argue that progress in tackling trade distortions is important in helping prevent a severe reduction in trade volumes and income levels in the event of a resurgence of protectionist policies in major economies. Similarly, a negotiated outcome on agricultural domestic support at the WTO would be important in helping to build consensus around the future direction of policies affecting markets for food and agriculture—not only by establishing agreement on how best to address past imbalances in permitted levels of trade-distorting support, but also in establishing a roadmap for further progress towards the objectives set out in Agenda 2030. Disciplines aimed at supporting the economic integration of LDCs should be a central feature of any such negotiated outcome.
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ANNEX 1: PROJECTED PATTERNS OF PRODUCTION, CONSUMPTION, AND TRADE FOR SELECTED PRODUCTS IN LDCs

Note: All data is for 2016-2026 and sourced from OECD/FAO Agricultural Outlook Database (accessed August 2017).

Figure A1. LDCs’ production, consumption, and trade in dried distillers grains

Figure A2. LDCs’ production, consumption, and trade in vegetable oils
Figure A3. LDCs’ production, consumption, and trade in other oilseeds

Figure A4. LDCs’ production, consumption, and trade in protein meals
Figure A5. LDCs’ production, consumption, and trade in molasses

Figure A6. LDCs’ production, consumption, and trade in pig meat
Figure A7. LDCs’ production, consumption, and trade in sheep meat

Figure A8. LDCs’ production, consumption, and trade in roots and tubers
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