

# Global Panel on Agriculture and Food Systems for Nutrition

## Technical Paper

### Emerging EU policy impacts on African food systems\*

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## 1 Introduction

The food systems of Africa and the European Union (EU) are deeply interconnected, creating a range of both positive and negative impacts across both continents. The EU is the primary destination for many African agricultural exports and serves as the main source of food imports from outside the African continent. Beyond trade, collaboration on development initiatives and support for international food agencies further highlight how the EU contributes to African food systems. However, there are negatives as well: the EU continues to be a substantial emitter of greenhouse gasses which, through their effects on climate change, impact African agriculture. Also, some EU policies have historically had adverse effects on African food systems. The EU's farm bill (the Common Agricultural Policy) previously contributed to overproduction and distorted markets, while EU trade policy protected EU markets. However, more recently new EU "greening" policies, including the European Green Deal, are seen as an emerging wave of EU policies that could present new challenges, but also opportunities, to African food systems.

Key components of these emerging policies, such as deforestation regulation, due diligence requirements, and the Carbon Border Adjustment Mechanism (CBAM) are expected to affect African food systems differently depending on the country, value chains, and individual farmers. These and other EU policies - such as its farm strategy - may also indirectly influence global food prices and economic development, with significant short- and medium-term consequences for Africa. As EU market access becomes more challenging due to higher sustainability standards, African producers may 'green' their production, challenge the regulations, or view alternative markets, particularly in Asia, as more attractive.

The EU's green policies are the subject of ongoing debate between its member nations while other economic and security challenges could influence and potentially slow their adoption. For African nations, which face significant challenges and opportunities in transitioning to sustainable food systems, it is highly desirable that the EU takes steps to anticipate and mitigate any unintended or negative consequences of its policies. This includes:

- Integrating African perspectives in policy decisions: Ensuring that EU policies consider the potential impacts on vulnerable African food systems by involving these nations in policy discussions and design processes.
- Using its policy tools: Leveraging all available EU policy mechanisms to support sustainable outcomes in Africa, rather than externalising environmental costs.
- Prioritising localised research and innovation: Supporting research and innovation tailored to the specific needs of African food systems to ensure sustainable progress.

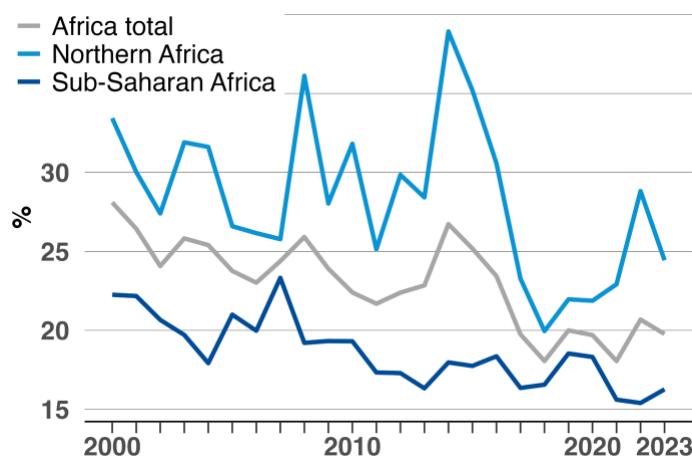
## 2 EU policy impacts on African food systems - past and present

### 2.1 Trade policy

The most important direct linkage between the EU and African food systems is through trade, which is a policy domain where EU member states have transferred almost all powers to the EU level. The EU is one of Africa's largest food trading partners. In general, the EU imports high-value coffee, cocoa and fruits. This generates valuable foreign exchange for African economies and links millions of

African farmers to a lucrative market. Meanwhile, at about 23% of African food imports, the EU is the leading external source of African food imports (Figure 1), even though there are large differences between North and Sub-Saharan Africa.<sup>1</sup> These imports from the EU — such as grains and dairy products — help stabilise Africa's food supply, diversify diets, and enhance the resilience of African food systems. The latter is especially important as rising food demand and the impacts of climate change act to increase the strain on African food systems.<sup>2</sup> Increases in international trade is, however, linked with more obesity, while trade agreements can constrain the policy opportunities to combat this overnutrition.<sup>3</sup>

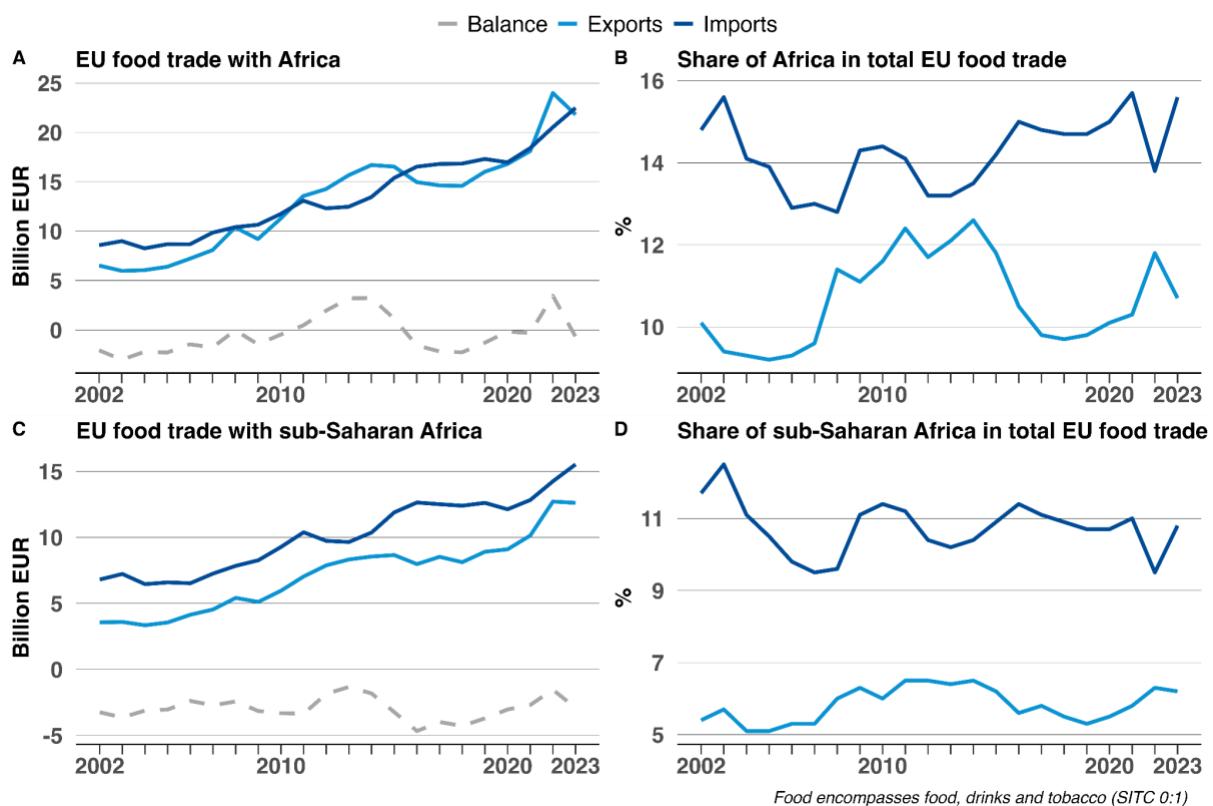
**Figure 1.** EU contribution to African food imports



Source: adapted from [FAOSTAT, 2024](#)

EU preferential trade agreements have facilitated the exchange of foods, leading to increased trade volumes. In 2019, more than 90% of all African exports entered the EU without paying import taxes. Although the EU imposes tariffs on specific food imports from certain African countries, and processed products face typically higher tariffs, the general impact of tariffs has steadily reduced.<sup>4</sup> However, the EU is known for imposing numerous non-trade barriers such as stringent food standards and other measures and regulations. Despite these hurdles, African food exports to the EU market continue to grow, even in the more regulated food value chains such as farmed fish and horticulture.<sup>5</sup> While total import and export volumes between Africa and the EU are nearly balanced, there is regional variation: Sub-Saharan Africa exports more food to the EU than it imports, whereas North Africa imports more from the EU than it exports (Figure 2).<sup>6,7</sup>

**Figure 2.** EU food trade with Africa and Sub-Saharan Africa specifically



Source: adapted from [EUROSTAT, 2025](#)

The EU has strongly protected its food market in trade negotiations, but, from the 1990s onwards, the EU pursued a gradual liberalisation of its agricultural markets. Recently, however, there has been a shift toward looking at global dependencies through a security lens, especially regarding the EU's import of fertilisers and protein crops.<sup>8</sup>

## 2.2 Development and science support

The EU and its member states are Africa's largest development partners for food security, offering substantial support through emergency aid, capacity building, and funding for agrifood research and support. The EU generally supported FAO, providing USD 1.6 billion between 2014 and 2021.<sup>9</sup> The EU also contributed USD 4.7 billion to WFP and 1.7 billion to IFAD.<sup>9</sup> Joint research and cooperation are supported through the EU-Africa Food and Nutrition Security and Sustainable Agriculture Partnership. On a project basis, the Development-Smart Innovation through Research in Agriculture (DeSIRA) initiative is the EU's flagship programme for supporting sustainable food systems in Africa.<sup>10</sup> Also, African organisations have access to Horizon Europe, the EU's major research initiative. However, the EU's support is typically predicated on its global priorities rather than partner needs, and in general, the current amount of science and development support is below that needed to address the scale of African food system needs.<sup>9,11</sup>

## 2.3 Agricultural policy

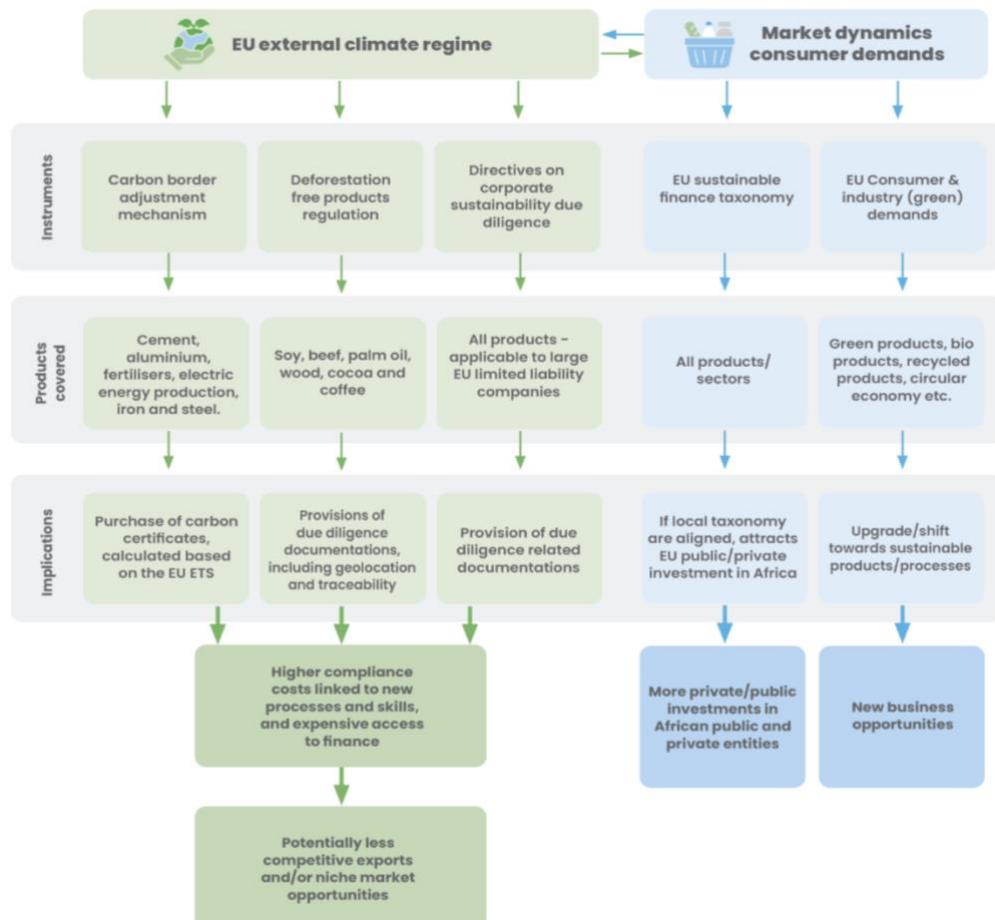
The EU's Common Agricultural Policy, which is one of the largest subsidy schemes in the world, is an example of an EU policy with negative spillover effects in certain African countries. Previously, the policy included measures that led to overproduction and export subsidies, leading to over-subsidised food entering African markets and outcompeting African farmers. Much has improved since 2013, with few distortive market effects prevailing in developing countries.<sup>3,12</sup> However, while the current EU farm bill is much less distortive, lingering negative impacts remain. Looking forward, a stronger environmental and climate-oriented farm bill would likely lead to less EU exports to Africa, but also lead to higher global food prices. Much of the reduced EU exports would, however, be taken over by other exporters.<sup>13</sup>

## 3 Impacts of emerging EU policy on African food systems

The EU has the ambition to make Europe climate neutral and sustainable, whilst simultaneously growing its economy. Its policies to achieve this - primarily through its European Green Deal and derived initiatives - are an emerging source of spillover effects on Africa's development. Figure 3 provides an overview of the greening policies, with likely implications for African food systems. These measures may have a high compliance cost, both in terms of their intended effects on production systems and the additional reporting burden that affects producers. These regulatory shifts, while intended for sustainability, place added pressure on African producers.<sup>14</sup>



Figure 3. Main EU climate policies and measures affecting African countries and firms



Source: Byiers et al., 2023.

The main initiatives are:

- **Carbon Border Adjustment Mechanism (CBAM):** The CBAM is an external counterpart to the EU's internal Emissions Trading System, in place since 2005. Its primary goal is to reduce 'carbon leakage' — the risk that production of carbon-intensive goods, especially in heavy industries, might shift to countries with less strict emissions rules or lower carbon costs.<sup>14</sup> Fertilisers are covered under the CBAM, which means that nitrogen fertiliser exporting countries, such as Egypt, need to pay a levy or invest to shift to green hydrogen. The scope of CBAM might increase in the future.
- **Regulation on Deforestation-free products:** This blocks the import of certain agricultural products from recently deforested land, including coffee and cacao. Both cacao and wood have particular significance for Africa given the deforestation occurring in these value chains. The implementation of the regulation has been postponed until December 2025 to provide companies with more time to ensure compliance.
- **Corporate Sustainability Due Diligence Directive:** This directive aims to prevent environmental harm and human rights abuses, promote responsible business conduct, and raise global standards by leveraging the EU's economic influence. Companies must identify, prevent, mitigate, and report on environmental and human rights risks across their entire

supply chain. However, beginning 2025, the directive might be watered down as part of the EU's simplification drive.

There are also EU initiatives that are domestically oriented, but which will likely affect African food systems indirectly. The Farm to Fork Strategy, for example, aims to green the European food system but might have implications for food security and nutrition: its tougher standards make market access for African exports to Europe more difficult; and as it might lower production, it could lead to higher global food prices, impacting Africa - and particularly African women.<sup>15</sup>

#### 4 Drivers of EU policy change

In its emerging greening policy, the EU tries to balance sustainability and competition and to create a 'level playing field' between EU and global producers. Recent protests by EU farmers have partly stemmed from frustrations over trade agreements that allow imports from countries where producers are perceived as operating under lower standards than EU farmers, thereby creating competitive disadvantages for EU producers.<sup>16</sup>

However, the COVID-19 pandemic and the Russian invasion of Ukraine have prompted the EU to reassess its reliance on global value chains and pursue 'strategic autonomy,' aiming to strategically support domestic production. The EU food and agricultural sector has an exceptionally active lobby which seeks to influence policies and priorities.<sup>17</sup> For example, in the context of food, this means that some within the EU are seeking to reduce dependence on soy and oilseeds—largely coming from South America and Southeast Asia — by exploring ways to bolster domestic production. The small share of African agricultural trade, combined with no EU competition in growing crops like coffee and cacao means that trade with Africa is seldom part of discussions on reducing dependence.

Internally, some EU member states are driving the green transition forward, while others are resisting. Denmark's plan to introduce a livestock carbon tax by 2030 illustrates how individual member states may adopt sector-specific climate policies that could eventually influence broader EU policy.<sup>18</sup>

One important lesson from the EU's farm bill is that it took substantial time to incorporate the needs and concerns of developing countries into EU policy discussions. Given the complexity of food systems, unintended consequences are not only common but often unavoidable, showing the need for strong policy foresight and planning together with developing partners. The CAP's overdue overhaul on market distortion highlights how difficult it is to balance domestic and international ambitions, and how the needs of developing partners can struggle to influence EU policy development.

#### 5 The impacts of new EU policy will depend on the country, value chain and farm

Quantifying the impacts of emerging - but also the older - EU policies on African food systems is challenging due to a mix of uncertainties and complexities. First, the lack of reliable data about African food systems makes it difficult to assess impacts on food and nutrition security. Secondly, EU policies do not exist in a vacuum but in the background of other local, national and global dynamics

that can make it hard to disaggregate impacts. Third, the policies themselves can change: CBAM, for example, is expected to expand its scope as the EU explores expanding its own internal carbon trading scheme to include the agricultural sector.<sup>19</sup> Fourth, sometimes the precise implementing modalities - for example in the deforestation regulation - are not yet determined but can impact who will need to do the compliance investment. Finally, the effects on African food systems depend heavily on responses within African countries themselves—governments, markets, and farmers all adapt differently, often in unpredictable ways. Together, these are some of the factors that make precise quantification challenging. Launching the Farm to Fork Strategy, for example, came with hotly debated possible impacts, and a reflection that current modelling approaches may fall short of capturing the systems dynamics.<sup>20</sup>

However, modelling and foresight can still help identify major trends and potential outcomes. The direct influence of these emerging EU policies on African food systems depends on the strength of the continent's linkages with the EU and is likely to differ widely depending on each country's specific conditions, the structure of food value chains, and the type of farming systems in place. National factors such as current levels of deforestation or strong engagement in food imports and exports chains will help to identify the most significant potential impacts from EU regulation.

The makeup of agricultural value chains adds another layer of complexity. Value chains which are covered by the deforestation regulation, or which have a high degree of informality will face a greater compliance burden. Meanwhile, the way farms are structured — whether dominated by smallholders or larger, industrial-scale operations — can influence how readily they can meet new requirements. Smallholder farmers, especially those operating in informal or less regulated supply chains, may not have the financial resources to adapt to EU compliance. The result will be both winners and losers.

The indirect implications of these policies can be greater and more varied. The EU is a major global food exporter and importer; if there are policies impacting production - without accompanying changes in diets - this might give rise to repercussions for global food markets. The launch of the EU's Farm to Fork Strategy was accompanied by reports that the sustainability provisions could lower EU production, which would raise global food prices and impact Africa especially.<sup>15,21,22</sup> Higher food prices could benefit successful African producers by increasing their revenue, but they may also place greater strain on consumers, particularly in regions where food insecurity is already a concern. The compliance costs and administrative burdens could fall disproportionately on smallholder farms or informal supply chains, potentially forcing changes in traditional agricultural practices. Moreover, the environmental benefits of lower EU production could be partly offset by 'leaking', meaning that other regions would increase their production spurred by the higher food prices thus lowering the environmental benefits. Restrictions on fertilisers and pesticides could further limit development options for African farms, constraining their ability to expand production in ways that suit local needs.

## 6 Building resilient EU-Africa food systems

The EU and Africa have very different food systems, with distinct priorities, needs and wants. The EU's food system provides ample food and nutrition security, but also has its challenges. It has large environmental impacts, is a big emitter of greenhouse gases, certain regions are increasingly impacted by climate change, and there are economic pressures on farmers and a lack of generational

renewal, with the EU's farm subsidy scheme being a lifeline for many. In the coming years, the EU is expected to take a more inward-looking and transactional approach to its international relationships, including those with Africa.<sup>23</sup> While the EU is likely to remain committed to its green agenda, the pace of these changes may slow amid political change and economic and security pressures.

African food systems face tremendous challenges in a background of higher food demand and escalating climate change impacts.<sup>2</sup> Even while there is substantial progress, the much-needed structural transformation of African agriculture lags, causing large challenges.<sup>24</sup> Bar rapid and sustained agricultural development, Africa will import more from the global market to satisfy its booming demand.<sup>2,25</sup> Export-oriented farmers have the double challenge of dealing with climate change impacts and stepping up to more stringent requirements in export markets. At the same time, African countries are integrating more, with African countries now having a wider diversity of trading partners than before. African countries are using this continental integration and a variety of external partners to define their position, including the future trajectory of their food systems and the sources of their food imports.

Amid these challenges, the EU has a crucial role as Africa's primary food trading partner and largest development supporter. There are many EU-Africa linkages, as exemplified in the rising trade between the two continents. However, current and emerging EU policies are often perceived in Africa, as — directly or indirectly — a threat to its food systems. This is despite the EU goal of climate neutrality being fundamentally aligned with the long-term needs of African agriculture. Clear assessment of these impacts is challenging, but the overall direction of EU agricultural policy appears to be shifting toward reducing environmental impact, prioritising domestic resilience, and protecting the sector from foreign competition, while moving away from emphasising exports. For certain African countries, then, the EU's policies can be perceived as an additional challenge in what is already a difficult environment.<sup>26</sup>

## 7 Conclusion

The interdependence between the EU's and African food systems delivers benefits for both sides, particularly through trade. Regardless of any future policy shifts within the EU, this interdependence is likely to endure. It is therefore in the EU's own interests for African food systems to be strengthened, enabling them to become more healthy, sustainable and resilient.

However, the interdependence between the EU's and African food systems is facing increased strain as the EU's emerging greening policies introduce new challenges. While these policies' objective of climate neutrality will benefit African agriculture by acting to reduce climate change and its impacts, the policies often directly place added burdens on African producers who may struggle to meet stringent new standards without adequate support. The risk is that, rather than fostering resilience, these policies could limit African market access, add compliance costs, and reduce opportunities for local agricultural growth. Indirectly, the EU's farming strategy can impact African food and nutrition security through its influence on global food trade.

All of these observations argue the desirability for the EU's policymaking to adopt a more nuanced approach, one that fully considers how its policies affect African food systems. Without stronger collaboration and flexibility in policy frameworks, there is a risk that the EU's actions could

unintentionally exacerbate African food and nutrition security. Moving forward, the EU would benefit from involving African stakeholders more in policy discussions and offering targeted and deepened support relevant to African needs.

The following recommendations are therefore suggested for consideration by EU policy makers

1. Improving how African perspectives can be better integrated into EU decision making: The EU can ensure that its policies consider the potential impacts on vulnerable African food systems by involving relevant nations in policy discussions and design processes.
2. Using its policy tools: Leveraging all available EU policy mechanisms to support sustainable outcomes in Africa, rather than externalising environmental costs.
3. Prioritising localised research and innovation: Supporting research and innovation tailored to the specific needs of African food systems to ensure sustainable progress.

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