Promoting investment climate reforms in Morocco's agri-food sector

Issues paper for the first private sector dialogue

13 July 2021, 14:00-16:30 (Rabat time), webinar

This note aims at guiding the discussions of a virtual private sector dialogue (PPD) on "Promoting investment climate reforms in Morocco's agri-food sector" on 13 July 2021. It provides an initial assessment of the sector, the role of FDI and key challenges affecting investments, with a focus on regulatory and business environment, R&D and climate change, and infrastructure and connectivity. Participants are invited to share their views and perspectives on common challenges and priorities for the agri-food sector. The conclusions will form the basis for a future PPD that will involve both Moroccan policymakers and agri-food representatives.

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Increased domestic and foreign investment in agri-food[1] can enhance food security and nutrition, reduce poverty, and strengthen incomes and livelihoods. While in previous years agri-food was largely produced for domestic consumption or for export as final products, agri-food products are now global in their reach, with different activities of the value chain spread across several countries (Punthakey, 2020[1]). Today, agri-food value chains have experienced deeper integration into the global economy with both developing and emerging economies increasing their roles both as suppliers and markets of agri-food products (ibid).

At a global level, agri-food is also becoming more interconnected with other sectors in the wider economy, including services, with trade and cross-border investment being driven by large multinational enterprises (MNEs) (OECD, 2019[2]). As a result, improvements in the investment policy framework can have an important influence on a country's ability to attract more and better investment in the agri-food sector and help increase integration in cross-border supply chains. OECD tools and policy frameworks, notably the Policy Framework for Investment in Agriculture, OECD Guidelines on Multinational Enterprises and its OECD-FAO Guidance for Responsible Agricultural Supply Chains, and the FDI Qualities Indicators, can support the design of adequate policies to address the challenges that domestic businesses face and can contribute to a more efficient and competitive business and investment climate in this sector.

Promoting sustainable investment in the agri-food sector has been at the core of Morocco's development strategy. Agricultural enterprises are a major source of jobs for a growing Moroccan population. They can help to achieve broad-based economic growth, reduce poverty and territorial inequalities, maintain competitiveness in international markets, but also contribute to the green transition of the country, helping to achieve the sustainable development goals (SDGs).

Agriculture and food are a priority for Morocco's economic and social development

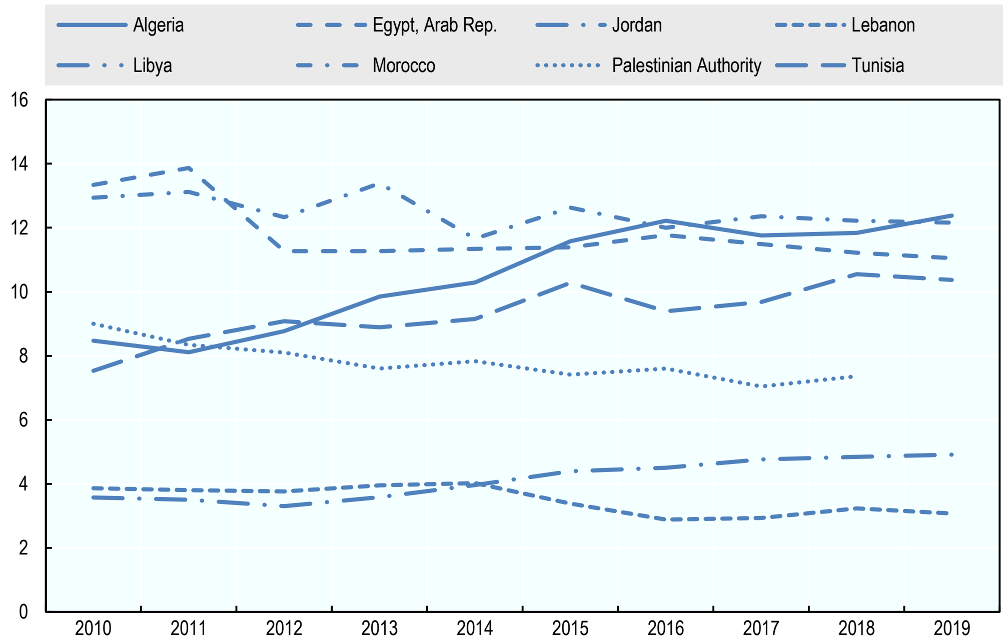
The agriculture and food sectors play an essential role for the Moroccan economy (OECD, 2020[3]). Together with fisheries and forestry, agriculture accounts for nearly 13% of GDP, more than in most of other economies of the Southern Mediterranean (MED) (Figure 1). Between 2008 and 2017, it grew by 7% on average, well above the 3.9% growth of Morocco's GDP in the same period (Harbouze et al., 2019[4]). While employment in agriculture in Morocco is the highest the MED region (33%) (Figure 2), poverty rates are above the national average in regions with large shares of agricultural GDP (World Bank, 2017[5]). Informal employment is largely dominant in the sector. Steps towards formalization can greatly impact overall growth, productivity and employment in the sector and in the wider economy.

In the sector, a minority of modern farms export, while the majority of subsistence farmers operate for the domestic market. Out of the 1.5 million farms, only 1% of them cultivate

[1] The agri-food sector encompasses all activities relating to the production, processing, distribution and sale of agriculture and food products. In this paper, we focus primarily on primary agricultural production and food processing.

an area of more than 50 hectares while 70% have less than five hectares. These are mostly family farms, which are not sufficiently covered by Moroccan agricultural and rural development policies (FAO, 2017[7]).

Figure.1. Agriculture, forestry, and fishing, value added (% of GDP) in MED economies



Source: *World Bank* (2021[8]).

The food sector comprises around 2 050 companies, most of which are micro, small and medium sized enterprises (MSMEs), and it employs around 141,000 people - the largest employer in the industrial sector, followed by apparel (120,172) (IFC, 2019[10]). While exports of agri-food increased in value over the last decade, volumes remained constant (World Bank, 2017[5]). Key growth segments in recent years in this sector include processing for cereals, dairy and poultry (Oxford Business Group, 2015[9]).

The agriculture and food sectors are strategic sector for the economic inclusion in Morocco, and notably for young people living in rural areas, where youth unemployment in 2018 reached 25% (Harbouze et al., 2019[4]). This is especially important considering the progressive ageing of the rural population, with the share of 15-24 year olds in rural Morocco expected to decline to 14% in 2040, from 19% in 2015 (ibid).The sectors also hold considerable potential for women economic empowerment (Box 1). While overall female labour force participation in Morocco stands at 21.3% (OECD, 2020[3]), in the agricultural sector this is 52.2%, the highest in MED (Figure 2).

Box 1. The potential of agriculture for the economic empowerment of women in Morocco

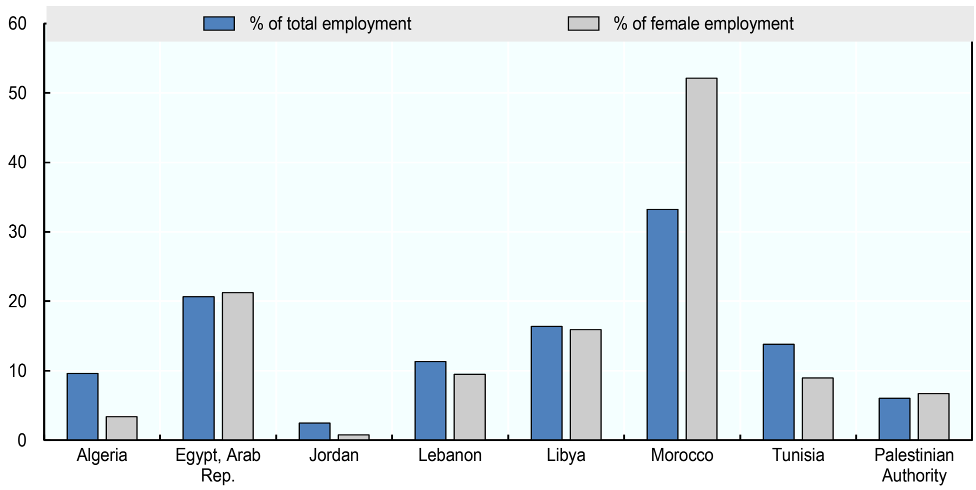
Low participation of women into the labour force is a key challenge to the overall social and economic development of Morocco. At present, female employment is much concentrated in agriculture, with over half of those working in the sector being women.

Although the analysis of gender-disaggregated data is still limited in the sector, a recent subnational study of five Moroccan regions shows that women contribute on average to 37% of agricultural income, a figure that increases to over 50% for several regions (Ben El Ahmar, 2018[11]). Yet, a regional survey found that women in agriculture earned on average 25% less than men even in tasks that require a more qualified labour (Abderrahim, 2016[12]). The overwhelming majority of rural women receive no income from their farm activities and remain excluded from the formal economy (Moisseron et al., 2019[13]). Overall, women continue to face a number of challenges in reaping the benefits of their labour and entrepreneurship that are distinct to those encountered by their male counterparts, such as higher obstacles in accessing land, water and financing. Women remain dependent on the productive assets of the family community, particularly land and agricultural capital, and have insufficient or no access to training and technology.

Public policies have too often focused exclusively on farm managers (mainly males) and their training (FAO, 2017[7]). In Morocco, the recent National Integrated Programme for Women and Girls Economic Empowerment (2020) integrates a gender approach to stimulating employment in agriculture, industry and tourism, with a special focus on women in rural areas. Further supporting women employment and entrepreneurship in the agricultural and agri-food sector would improve sustainable growth and inclusiveness, leading to higher welfare levels for all.

Figure 2. Employment in agriculture in Morocco is higher than in any other MED economies, particularly among women

Employment in agriculture (modeled ILO estimate), 2019



Note: The agriculture sector consists of activities in agriculture, hunting, forestry and fishing.
Source: *World Bank* (2021[8]).

These dynamics contributed to putting sustainable agriculture and food production among the priorities of the country's economic and social development. In 2008, the government launched the Green Morocco Plan (Plan Maroc Vert) to make the agricultural sector the main engine of growth in Morocco (FEMISE, 2013[6]). The Plan promoted the expansion of the sector, inter alia by improving framework conditions (institutional, legislative and regulatory context) to strengthen the attractiveness of the sector to foreign investors (Moroccan Ministry of Agriculture, 2019[14]). It contributed to the creation of around 300 000 jobs between 2008 and 2020, doubled the contribution of the sector to GDP and the value of agricultural exports, and mobilised around 7.1 billion USD of private investment (ibid). Building on the achievements of the Plan, a new development strategy was launched in 2020, called the "Green Generation 2020-2030". The strategy aims to support modernisation and increased competitiveness of the agricultural sector, including by creating a new generation of agricultural workers and entrepreneurs among the youth and rural population (World Bank, 2020[15]).

The economic and social impact of the Covid-19 pandemic has considerably affected the economic outlook of the Moroccan economy. The agricultural sector was affected not only by the strong containment measures but also by the impact that drought had on production (ETF, 2021[16]). Although the food sector managed to largely cover the national demand at stable prices (FAO, 2020[17]), 2020 saw a considerable decrease in harvest. Harvested wheat and barley stood at around 40% and 45% lower than in 2019, respectively, and cereal production was 60% lower than the latest five-year average (FAO, 2020[18]). Imports in 2021 are also expected to increase due to these constraints and domestic consumption needs. This trend is in line with that of the MENA region, where food imports per capita are the highest in the world and total agricultural production is expected to decrease by 21% by the end of the century compared to 2000 (OECD, 2021[19]).

Key questions

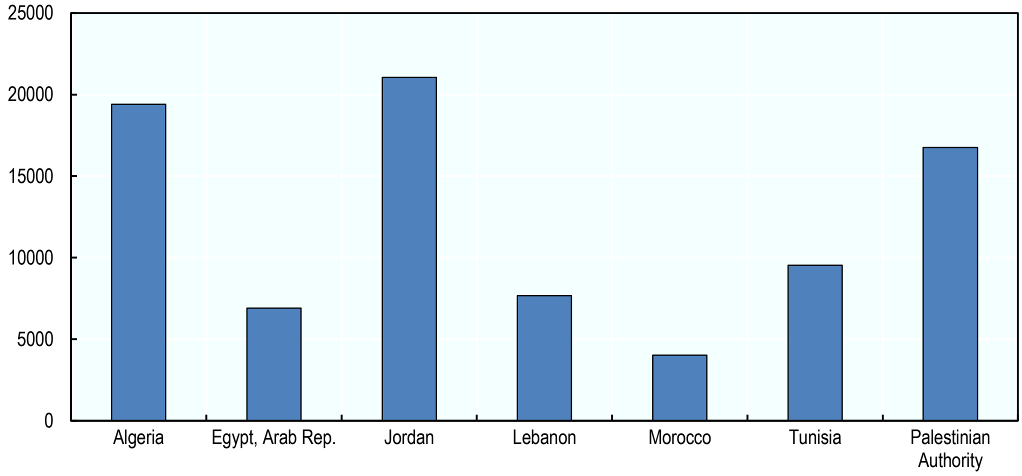
- How have recent strategies of the Moroccan government addressed the needs of the agri-food sector?
- How have the voices of the Moroccan agri-food private sector been involved in the development of these strategies?
- What overarching priorities should guide policy reform in Morocco's agri-food sector in the aftermath of the Covid-19 pandemic?

Investments in the agricultural sector can support job creation and participation in regional and global value chains

Under the right conditions, foreign direct investment (FDI) can support further development of the Moroccan agricultural sector by enhancing job creation, productivity and growth. FDI in agri-food in Morocco generated almost twice as many jobs per million USD of investment than the cross-sector average, and around 8 times the amount of jobs per million USD of investment as compared to the energy sector (fDi Markets, 2021). More investments could also enhance productivity of the agricultural sector. Despite Morocco and Algeria being regional leaders in terms of value added in agriculture, forestry, and fishing as percentage of GDP, value added per unit of input in the sector in Morocco is the lowest among MED economies, in part due to limited labour productivity (Figure 3).

Figure 3. Labour productivity is the agricultural sector in Morocco is the lowest in MED

Agriculture, forestry, and fishing, value added per worker (constant 2010 US$), 2019

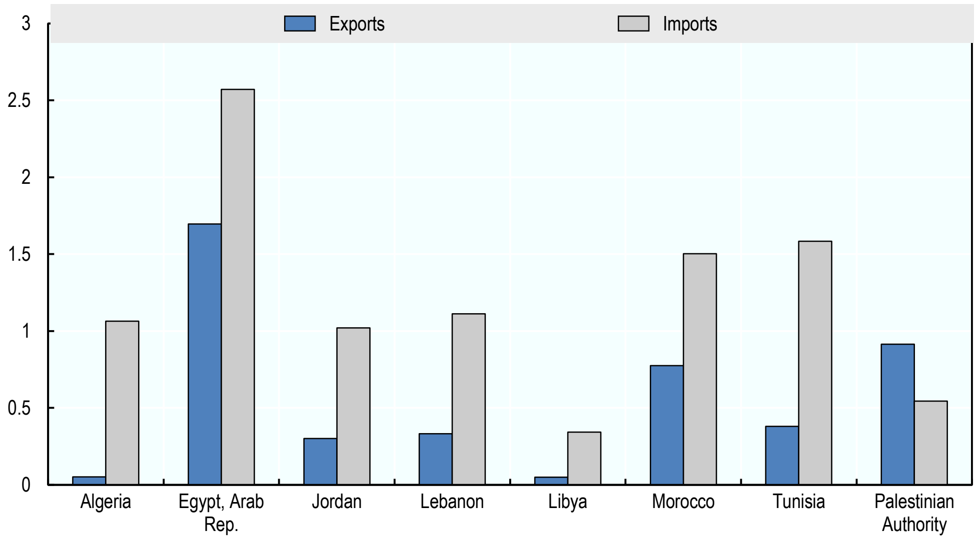


Source: *World Bank* (2021[8])

Promoting quality investment in the agricultural and food sector can also facilitate its integration of the Moroccan sector into regional and global value chains (GVC). Several studies have shown that FDI inflows are positively correlated with increased participation in GVC (Punthakey, 2020[1]). Investments can also generate positive spillovers by boosting the capacity of local production and enhance the benefits of GVC participation (ibid). This opportunity is particularly relevant for Morocco, whose agricultural production model remains strongly based on self-sufficiency. Yet, the country has one of the highest values of trade in agriculture as a percentage of merchandise trade in the region (Figure 4). Exports have increased by 40% during the 2014-2020 period with the agri-food sector accounting for around 21% of total exports, making Morocco the third largest agri-food exporter in the African continent. (Harbouze et al., 2019[4])

Figure 4. Value of trade in agricultural raw materials as % of merchandise trade

Agricultural raw materials exports and imports (% of merchandise exports and imports), 2019 or latest available year



Note: Latest available data for Algeria refers to 2017, for Lebanon and Libya to 2018
Source: *World Bank Development Indicators.*

Key questions

- What type of investment is needed to sustain agri-food development as a driver of job creation in Morocco ?
- Are there success stories of linkages between MNEs operating in Morocco and local MSMEs?

FDI in agri-food remains below its potential

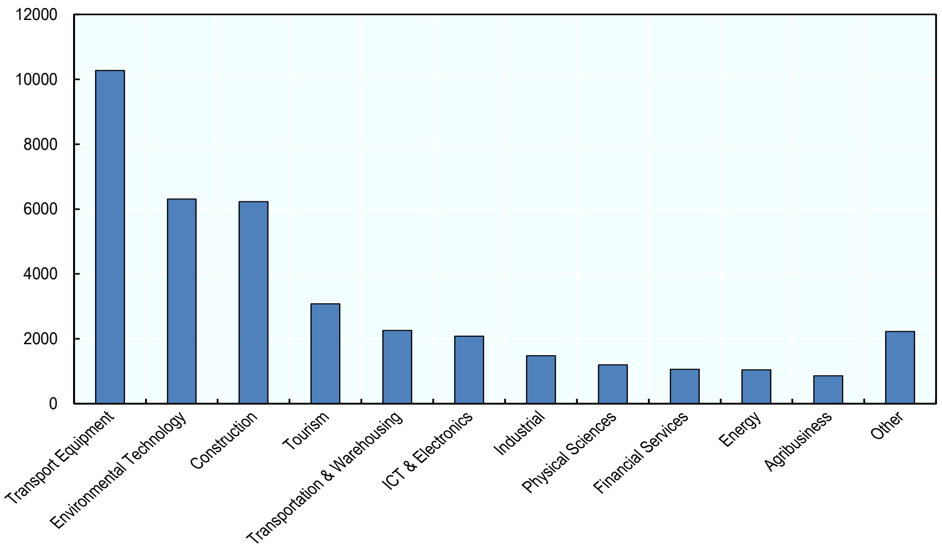
Despite its importance for jobs and sustainable growth, FDI in agri-food remains significantly below its potential in Morocco. Between January 2010 and April 2021, the country attracted USD 38 billion of Greenfield FDI, of which only 2.3% in agri-food[2]. By comparison, transport equipment attracted around 27% of total FDI, environmental technology 16.5% and construction 16.4% (Figure 5). With regards to the origin of FDI, MNEs from the EU account for nearly half of the total investments in the sector (49.2%), with Spain representing the major source country within the bloc (31.4%). The United States (25.3%) and the United Kingdom (12%) also make up a considerable part of the share, while investment from the MENA region remains limited to 7.6%, mainly from Tunisia (3.7%) and Egypt (2.3%) (Figure 6).

[2] Agri-food includes manufacturing of dairy and seafood products, grains and oilseed, coffee and tea, snack food, tobacco; and logistics, distribution and transportation of fruits, vegetables and specialist foods.

As for the geographical destination, FDI in agri-food is highly concentrated around the coastal and urban areas of Morocco, with more than half of total FDI in the sector between 2010 and 2021 being directed to the region of Casablanca-Settat. Attracting quantity and quality private investment to rural and least developed areas can be crucial for the inclusion of local communities and the enhancing of territorial cohesion.

Figure 5. Greenfield FDI in Morocco by cluster of the economy

Announced Capital Expenditure, USD million (Jan 2010 – April 2021)

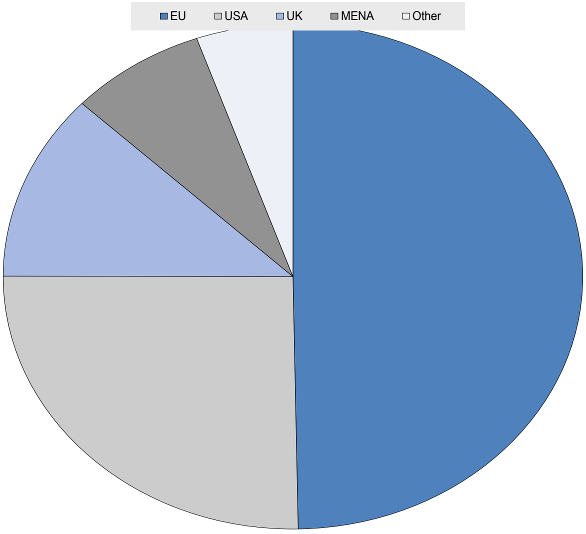


Note: The agri-business cluster includes manufacturing of dairy and seafood products, grains and oilseed, coffee and tea, snack food, tobacco; and logistics, distribution and transportation of fruits, vegetables and specialist foods.
Source: *OECD elaboration based on Financial Times' fDi Markets* (2021[21])[3]

[3] Data provided by OECD Investment Division

Figure 6. Greenfield FDI inflows in the agribusiness cluster by country/region of origin

Announced capital expenditure, USD millions (2004-2021)



Source: *OECD elaboration based on fDi Markets* (2021[21])

Key questions

- How can Morocco enhance the attractiveness and competitiveness of its agri-food sector vis-à-vis international investors?
- What can be the role of the Moroccan private sector in attracting quality investment in agri-food?
- How can Morocco attract investors from new and emerging markets?

Key challenges affecting investments in agri-food

The quality of Morocco's investment climate can influence its ability to attract investments. A recent OECD survey of MNEs in the agri-food sector finds that proximity to consumer markets and fast growing economy is the most important market-related driver of FDI, with other factors including high quality institutions, political stability, lack of conflict and ease of doing business also being ranked highly (World Bank, 2017[5]). Thanks to its strategic geographical position between Europe and Sub-Saharan Africa, political stability, and one of the most favorable business environment in the region (World Bank, 2020[22]), Morocco has become an attractive destination for the agri-food sector for international investors, including global leaders like Coca-Cola, Danone and Nestlé. Yet, several challenges remain that influence investment in Morocco's agri-food sector.

Challenge 1: Business and regulatory environment

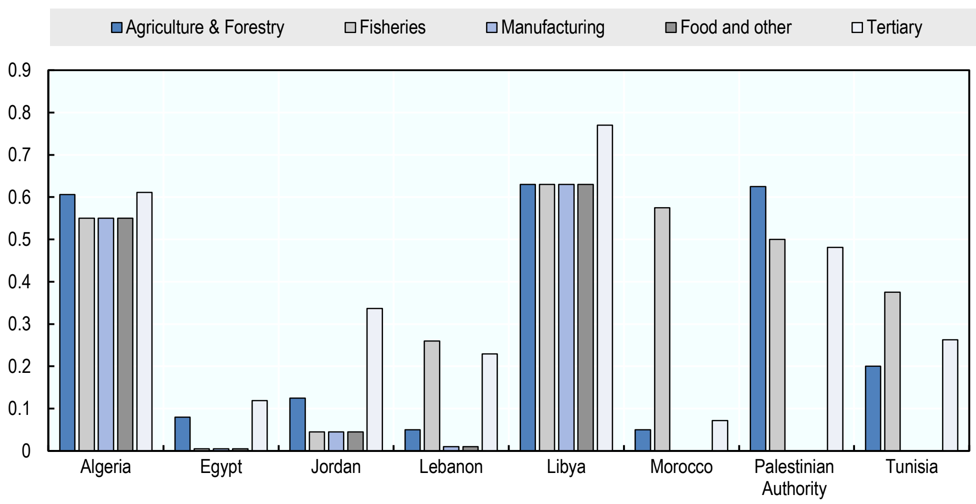
Developing a sound and enabling investment climate for agri-food requires addressing a broad set of policies areas, including laws governing responsible business conduct, employment and labour market regulations, agricultural support policies, access to finance, taxation, gender neutral legislation concerning inheritage of ownership of businesses and land. This should be done in consultation with a wide range of stakeholders, including relevant government bodies at all levels, potential domestic and foreign agricultural investors, agricultural workers, professional farmers' organisations, civil society organisations, communities affected by investment decisions, including marginalised groups such as smallholders and women; and wider interest groups (Punthakey, 2020[1]).

Morocco offers a relatively open environment for investors in the agriculture and food sectors. According to the Enabling the Business of Agriculture rankings of the World Bank, Morocco is the top performer in the MENA region, with relatively efficient regulations for farmers and comprehensive plant protection laws (World Bank, 2019[23]). In the realm of machinery registration, for example, Morocco performs similarly to Finland and South Africa.

FDI restrictions: Compared to other MENA economies, Morocco also maintains only a few statutory restrictions on FDI, which is exemplified by its position in the OECD FDI Regulatory Restrictiveness Index for 2019 (Figure 7). According to the Index, Morocco has lower overall FDI restrictions than the average for Algeria, Libya and the Palestinian Authority. However, FDI restrictions in the fisheries sector are higher than the average of Egypt, Lebanon, Jordan, Palestinian authority and Tunisia. Investment projects in agriculture are eligible for tax holidays, i.e. a permanent corporate income tax exemption over a defined period (OECD, 2021). Yet, despite the relatively open environment for investment in agri-food, there are several other challenges acting as a constraint to the development of the sector, including trade issues, access to finance and land.

Figure 7. OECD FDI Regulatory Restrictiveness Index in selected sectors

Closed=1, Open=0 (2019)



Note: Tertiary include: Distribution, Wholesale, Retail, Transport (Surface, Maritime, Air), Hotels & Restaurants, Media (Radio & TV broadcasting, Other media), Financial services (Banking, Insurance, Other finance), Business services (Legal, Accounting & audit, Architectural), Engineering, Real estate investment.
Source: *OECD,* (2020[24])

Trade barriers: Despite efforts to facilitate trade, there is currently a protected domestic market, particularly for consumer goods, which undermines the attractiveness of exporting and creates incentives for informal trade. Import tariffs on some agri-food items such as beverages, yogurt, couscous, ice cream and tomato sauce and ketchup, are as high as 45 to 50%.[4] This keeps some domestic firms protected and profitable in the domestic market, reducing their incentive to upgrade and to export.

Access to finance: Insufficient access to financial services, especially for smaller firms is also a challenge. The focus of the Green Morocco Plan on incentivising the creation of cooperatives has been considered effective in improving access to finance (ETF, 2021[16]). However, high interest rates and collateral demands keep on limiting credit in the sector. This is especially the case for small farmers and SMEs in the agri-food sector, which do not create enough revenues and hold adequate guarantees to turn to financial institutions and which are too big to be considered by microfinance (FAO, 2016[25]). Investing into the financial literacy of economic actors in the sector can also contribute to an easier access to credit. Some efforts have been made on the digitalization of banking products and solutions for SMEs (Groupe Crédit Agricole du Maroc, 2016[26]) (Ideas Online, 2019[27]), however it deservers further investment to reach the rural youth and peri-urban farmers.

Land fragmentation: This has been a constraint to development of the Moroccan agricultural sector needs, in terms of human resources, innovation, energy, and water management to meet international standards. Formally, foreigners are barred from owning agricultural land in Morocco, but they can rent it for a maximum of 99 years. However, a proposed law may revise this restriction (OECD, 2021[19]). The government have been expanding the use of private-public partnerships agreements, in which larger plots of land are allocated to investors for the growing of specific crops (Castlereagh Associates, 2020[28]).

Challenge 2: R&D and climate change

In Morocco, just like in other economies of the MENA region, greater agricultural production will depend on innovation to enhance productivity growth in the face of scarcity of water and arable land. Throughout the years, policies have encouraged collaboration among farmers and cooperatives to improve and stimulate productivity, entrepreneurship, and introduction of new technologies. Still, Morocco could do more to promote R&D in environmental science to address current challenges, especially the water challenge. Moverover, equiping the workforce with the right skills is also necessary to further develop the agri-food sector and make it more competitive.

Morocco faces increased pressure on water and land resources, which is likely to have negative impacts on agricultural production and trigger food security issues. At the moment, agriculture relies heavily on irrigation, which is practiced on only 16% of the cultivated land in the kingdom, but generates half of the agricultural GDP and 75% of agricultural exports (IFC, 2019[10]) Investments in water saving technologies (e.g. drip irrigation) are needed to strengthen resilience to drought and increased water scarcity due to climate change.

Investing in new digital technologies could also increase the competitiveness and productivity of the agri-food sector, and making it more attractive for the rural youth (World Bank, 2020[15]). For instance, the use of precision agriculture using satellite and drone imageries, sensors, weather data could allow farmers to improve the adoption of digital technologies and innovative production practices. However, this requires a minimum level of training and skills in managing software and data, which are hard to access for SMEs. Moreover, due to the lack of providers of technological solutions, the cost of equipment and services remain too high even for most of the commercial farms.

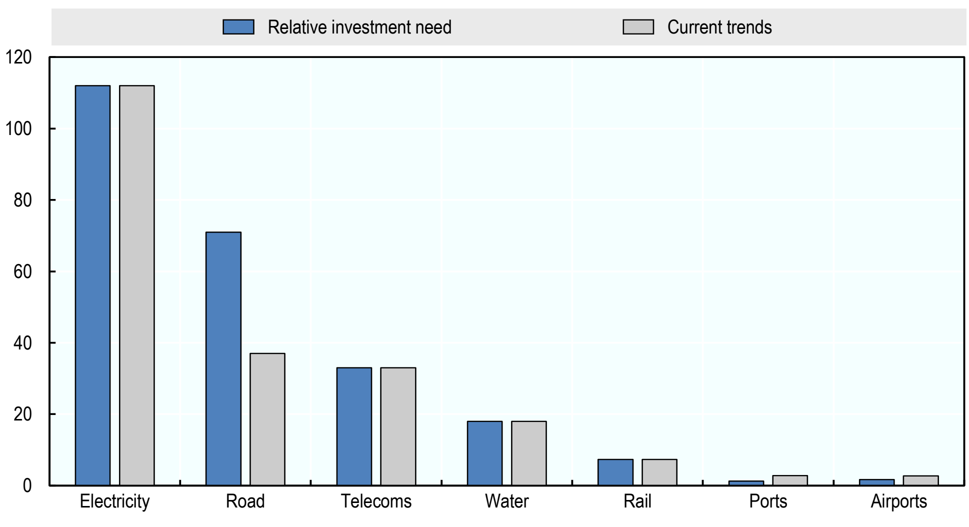
Currently, more innovation at the firm level in Morocco's agri-food sector is limited by the lack of skilled labor. According to a World Bank survey, finding staff with the right skills is one of the top three challenges facing agri-food enterprises in Morocco (World Bank, 2017[5]). The sector often lacks specialised staff, both at technical and management level (ibid). So far, growth in the sector has been led by large companies that have access to technology and finance, but supporting SMEs to become more competitive through better training and skills will also be important for the future of the agri-food sector.

Challenge 3: Infrastructure and connectivity

Improved infrastructure can boost support services for agri-food, strengthen food value chains, and increase market access for smallholder farmers. While in recent years Morocco has made significant investments to enhance access to basic infrastructure, the quality and quantity of infrastructure remain unequal between rural and peri-urban regions. In some medium-sized and small cities, access to infrastructure is still limited, creating transportation challenges for agri-food products. Recent estimates indicate that Morocco needs USD 37 billion of investment in infrastructure until 2040 under a 3.6% of GDP growth assumption (Global Infrastructure Hub, 2017[29]). Given the current levels of spending, this translates into an investment gap of 1% of GDP. The largest needs are in roads (USD 71 billion), rail infrastructure (USD 7.3 billion) and ports (USD 2.8 billion) (Figure 8). Not only new infrastructure is needed, but also proper maintenance and quality control of the existing assets is necessary.

Figure 8. Infrastructure investment needs in Morocco, 2016-40

In billion USD

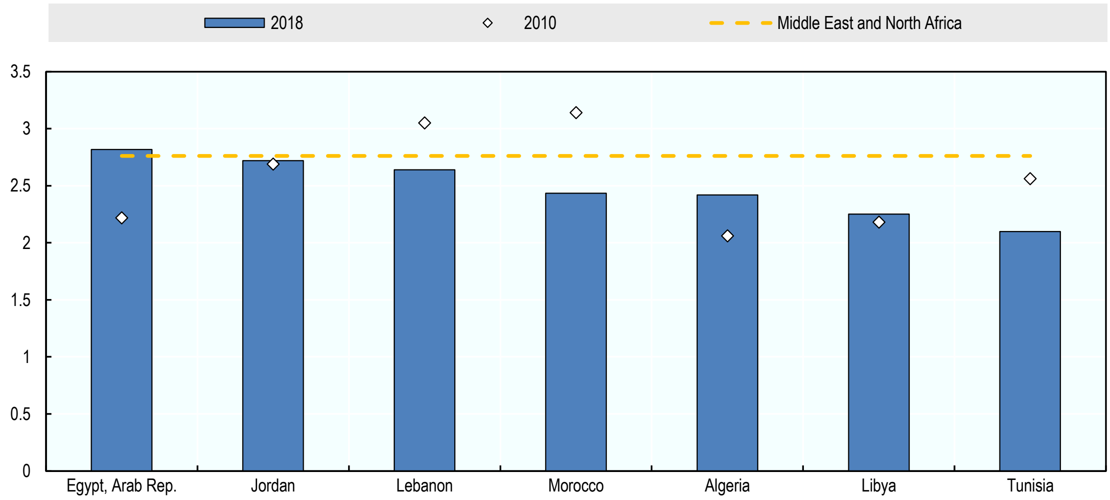


Source: *Global Infrastructure Hub*, (2017[29]).

The quality of Morocco's existing infrastructure varies significantly. Transport infrastructure, which is important for accessing new markets and increase participation in agri-food value chains, ranks lower in Morocco than some of its peers in the region (Figure 9). Such bottlenecks can impede further growth of agri-food firms, be it domestic or foreign. Improvements to the major road and railway routes have helped to strengthen transport connectivity, but substantial deficiencies remain. Between 2010 and 2018, Morocco's infrastructure performance has worsened, partly because of weaknesses in customs services and tracking and tracing consignments (Chauffour, 2018).

Figure 9. The World Bank's Logistic Performance Index, Infrastructure Indicator

Score from 1 to 5 (best)



Note: Data for 2010 Morocco is from 2012. The Infrastructure Indicator is one of the six dimensions of the logistics supply chain of the World Bank Logistics Performance Index (LPI), which is based on a worldwide survey of logistics operators on the ground, providing feedback on the logistics "friendliness" of the countries in which they operate and those with which they trade. It measures performance along six dimensions of the logistics supply chain, including: 1) Efficiency of the clearance process (i.e., speed, simplicity and predictability of formalities) by border control agencies, including customs; 2) Quality of trade and transport related infrastructure (e.g., ports, railroads, roads, information technology); 3) Ease of arranging competitively priced shipments; 4) Competence and quality of logistics services (e.g., transport operators, customs brokers); 5) Ability to track and trace consignments; 6) Timeliness of shipments in reaching destination within the scheduled or expected delivery time

Source: *World Bank Logistics Performance Index* (2018[30])

OECD policy frameworks and tools can support Morocco's efforts to improve the competitiveness and attractiveness of its agri-food sector

The OECD has developed over the years a number of policy tools on investment and agriculture. These are presented below, in light of their relevance to support Morocco improving the competitiveness of its agri-food sector and its attractiveness for international investors.

- The **OECD Policy Framework for Investment in Agriculture (PFIA)** brings together key guidelines to help governments create the right conditions to attract domestic and foreign investment. It is a sectoral adaptation of the **Policy Framework for Investment** and represents a flexible tool to help governments evaluate their investment policies in the ten areas essential to creating an attractive environment for investors and in enhancing the development benefits of agricultural investment. It aims to support countries in evaluating and designing policies to mobilise private investment in agriculture for steady economic growth and sustainable development. It was first developed in 2010 by the OECD Africa Investment Initiative, the Sahel and West Africa Club and the Office of the Special Adviser on Africa of the UN Secretary General. It has since benefited from inputs from the agricultural, investment, and development policy communities at the OECD.

- The **OECD Guidelines for Multinational Enterprises**, to which Morocco is an adherent since 2009, contain key recommendations addressed by governments to enterprises operating in or from adhering countries. The Guidelines are the only multilaterally agreed and comprehensive code of responsible business conduct (RBC) that governments have committed to promoting. They are aligned with the ILO Tripartite Declaration of Principles concerning Multinational Enterprises and Social Policy and the UN Guiding Principles on Business and Human Rights. The Guidelines recognise that enterprises can make positive contributions to economic, environmental and social progress. They therefore recommend that enterprises carry out risk-based due diligence to avoid and address adverse impacts on people and the planet associated with their operations, supply chains and business relationships. In the agricultural sector, enterprises can contribute to the productivity, employment and safety along the supply chain by bringing expertise, technology and financing capacities.
- In addition to the OECD Guidelines for MNEs, the **OECD-FAO Guidance for Responsible Agricultural Supply Chains** represents a central reference for companies of any size in the agricultural sector to implement risk-based due diligence. The Guidance provides enterprises with a practical framework to identify, prevent and mitigate adverse impacts on people, the environment and society along the full agricultural supply chain. Recognising that building responsible agricultural supply chains is critical to sustainable, resilient and inclusive growth, governments are encouraged to promote the use of the Guidance with a view to ensure that agricultural enterprises conduct business responsibly and contribute to sustainable development, in particular poverty reduction, food security and gender equality.
- The OECD **Declaration on Better Policies to Achieve a Productive, Sustainable and Resilient Global Food System** constitutes a central pillar of the OECD efforts to set global standards in the realm of agricultural policy. It outlines a set of shared goals for the agriculture and food sector, and a set of policy principles to ensure an integrated approach to agriculture and food policies reflecting these shared goals. It invites to build a solid evidence-base on the best policy mixes to achieve the shared goals, and emphasizes on tailoring advices to specific countries so as to take account of the diversity of economic, environmental, social, and food security situations. These goals include:
    - Ensuring reliable access to safe, healthy and nutritious food;
    - Enabling producers everywhere, big and small, male and female, to operate in an open and transparent global trading system;
    - Guaranteeing sustainable productivity and resource use;
    - Contributing to inclusive growth and development.

- OECD cross-cutting analysis includes the annual **Agricultural Policy Monitoring and Evaluation report**, which reviews developments in agricultural policies at the country level and provides up-to-date estimates of government support to agriculture, as well as the **Policy Instruments to Support Green Growth in Agriculture**, which defines the concept of green growth, and takes stock of the current initiatives in OECD countries to promote green growth.
- The **2020 OECD Agro-Food Productivity-Sustainability-Resilience Policy Framework** reviews the impacts of a wide range of policies on the creation and adoption of innovations needed to increase productivity and sustainability in food and agriculture, leading to concrete recommendations for each policy area. It examines the respective roles for the government and the private sector in strengthening agricultural innovation systems and facilitating adoption of more innovative practices at the farm and agri-food firm level.
- Finally, the **Digital Opportunities for Better Agricultural Policies (2019)** report present opportunities to deliver better policies for the agriculture sector by helping to overcome information gaps and asymmetries, lower policy-related transaction costs, and enable people with different preferences and incentives to work better together.

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