EMPOWERING CIVIL SOCIETY NETWORKS

IN AN UNEQUAL AND MULTI- POLAR WORLD

CHANGING FOOD SYSTEMS AND INEQUALITY: IMPLICATIONS FOR FOOD SECURITY AND PUBLIC POLICY

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EXECUTIVE SUMMARY

Globalization has drastically altered agri-food systems across the world. These shifts represent a departure from traditional food systems based on fragmented buyers and small-scale farmers towards large supermarkets, processors, and trade intermediaries who set requirements for producers and create new opportunities and challenges for smallholders. At the same time, countries have moved towards policies of liberalization and privatization in many sectors, including agriculture, often based on advice and program efforts from international financial institutions. Newly reformed social policies, largely in the form of transfer programs, have been introduced in order to manage growing inequalities, but these only serve to enhance consumption and do little to address underlying, structural causes of poverty and inequality. Research on the effectiveness of these initiatives indicates a significant reduction of absolute poverty; however rural communities often still face important social and economic inequalities with respect to their urban counterparts. In short, policy makers and civil society actors must pay greater attention to systematic national and global shifts in the economy in order to craft policies which effectively promote a more inclusive and equitable food system.

In today's world, national food systems are deeply interlinked through patterns of trade and investment that are often referred to as global value chains (GVCs). An important feature of value chains is the role played by powerful lead firms – large food processing firms, trading companies, and national and multinational retail and restaurant chains – in setting the terms by which farmers may participate in the food system. Such firms typically favor large, well-capitalized suppliers who control lots of land, placing smallholders at a disadvantage and exacerbating the barriers faced by marginalized groups seeking markets for their products. Thus, the consolidation of monopolies and oligopolies in the processing and retailing segments of food value chains have important knock-on effects for the farming sector, typically in favor of larger and better-financed agricultural entities. In this report, we draw out the implications of the globalization and consolidation of agri-food value chains for inequality by showing global pressures combine with local and national conditions to produce outcomes which exacerbate economic, gender and urban-rural inequalities. By focusing on four BRICSAM nations (Brazil, India, Mexico, and South Africa), this report shows how current national policy responses have limited success in addressing inequality due to the growing global power of multinational actors and a corresponding shift in the governance of the food system away from government-driven national development strategies towards corporate profit- seeking interests, which oftentimes do not align with the goals of a more inclusive food system and secure access to nutritious food for all.

Our key findings are:

1) AGRI-FOOD GLOBAL VALUE CHAINS ARE INCREASING CONSOLIDATING IN BRAZIL, INDIA, MEXICO AND SOUTH AFRICA. Large, often multinational corporations are playing an important role in driving this trend, primarily through foreign direct investment. In addition, trade and investment liberalization has created transnational linkages between national food systems, which reduce the power of national governments to regulate their own food systems. Consolidation in the processing and retail segments of the chain limit the market access of small holders, specifically through the mechanism of sourcing requirements (large batches, tight time frames, low cost, standards). Due to a lack of access to financial resources and limited practical knowledge about how to meet these requirements, smallholders struggle to maintain access to markets over time. While supporters of the globalization of agrifoods systems suggest that consumers benefit from lower prices, expanded choices and improved food safety standards, the way that it has been implemented has left many smallholders across the globe in vulnerable positions.

2) BRICSAM NATIONS ARE PURSUING SOCIAL POLICIES TO EMPOWER SMALLHOLDERS, BUT LARGE INEQUALITIES REMAIN. In each of the cases, social policies, including cash and in-kind transfers and employment generation programs, are used as a mechanism to fight inequality, poverty and food insecurity. But as important as these policies are in providing social safety nets for vulnerable populations they do not change the underlying structural conditions which are leading to unequal outcomes, not only along economic dimensions but also gender and urban/rural. Programs which specifically aim to empower rural areas, support smallholders and promote a more equitable food system need to move beyond an exclusive focus on expanding the consumption opportunities of the rural and urban poor and focus more directly on the conditions under which food is produced, including the competitive practices sourcing strategies used by agro-processing and retail companies.

3) THE SPACE FOR POLICY IS SHIFTING FROM DOMESTIC SPACES TOWARDS INTERNATIONAL ARENAS. In today's interconnected world, decisions are often made above the country level, limiting the ability of national governments to respond in ways that empower smallholders and promote a more equitable food system. Large, multilateral organizations and the shift towards neoliberalism are shifting policy decisions to global and private actors, such as the WTO and corporations. BRICSAM nations will need to ensure that they have the policy space to introduce interventions that facilitate the incorporation of smallholders into the value chain in order to achieve long term reductions in inequality and rural poverty. The example of Brazil offers important examples of policies for empowering rural society, including public procurement programs, targeted credit programs, and institutional commitment to supporting family farming. An important component of Brazil's success in these areas has been the creation of formal mechanisms through which civil society organizations may deliberate with ministerial policy-makers about food security strategy.

4) CIVIL SOCIETY ORGANIZATIONS NEED TO LOBBY ON A LARGER SCALE, WITH COLLABORATIONS ACROSS NATIONS. As food systems – and the private companies that govern how they are organized – become increasingly globalized in scope, civil society networks also need to turn their attention towards the international negotiations that continue to shape agricultural economies from the top down. Beyond the important role that they play in informing national policy-making, civil society organizations should insert themselves into multilateral, regional and bilateral trade negotiations in order to ensure plenty of policy space for governments to pursue inclusive national development strategies. In addition, civil society actors should share information about best practices and other lessons for confronting the common challenges that accompany food system globalization, such as the growing market power of monopolies and oligopolies in the processing and retail segments of food value chains. Broad strategies for dealing with these challenge introducing limits or conditions on market power and on foreign direct investment.

The challenges facing supporters of equality and inclusiveness in the food system have changed in recent decades, as powerful private-sector actors have vastly expanded their role in governing food value chains. Through collaboration and information-sharing, civil society networks can advocate for policies at the national and global levels that address the challenges posed by today's consolidated and globalized food value chains and the barriers that these pose for political efforts to craft a fairer and more inclusive food system. History shows that neither pro-market nor pro-state approaches alone can effectively ensure equitable access to safe and nutritious food, however the balance of power is currently tipped too far in the direction of private control of the food system. There is an important role for CSOs to play in both crafting and advocating for pragmatic and innovative public policies that can deliver on the promise of an equitable and inclusive food system for all.

1. INTRODUCTION

Brazil, India, Mexico and South Africa have gained widespread attention for their macroeconomic performance since 2000, earning them the popular label "emerging economies." Yet in spite of the robust economic growth that these countries have enjoyed in recent years, they are also struggling with levels of income and wealth inequality that are either already alarmingly high or growing rapidly. The inequalities that characterize these emerging economies are expressed throughout the food system, affecting both producers and consumers of food. On the production side, even as small farmers and agricultural laborers face resource shortages, threats to land tenure and dwindling market access, large, often transnational, agribusiness corporations) have enjoyed steadily growing revenues. With respect to consumption, poverty and income inequality undercut the ability of many consumers to purchase adequate, nutritious food. Furthermore, historical gender inequalities and pervasive urban-rural divides exacerbate the challenges to food security and economic wellbeing for women, marginalized groups and rural communities. As Olivier De Schutter, United Nations Special Rapporteur on Food Rights recently acknowledged, these trends in agricultural and food delivery systems across the world are threatening food security and undermining the productive role of smallholder farmers (UNHRC, 2014).

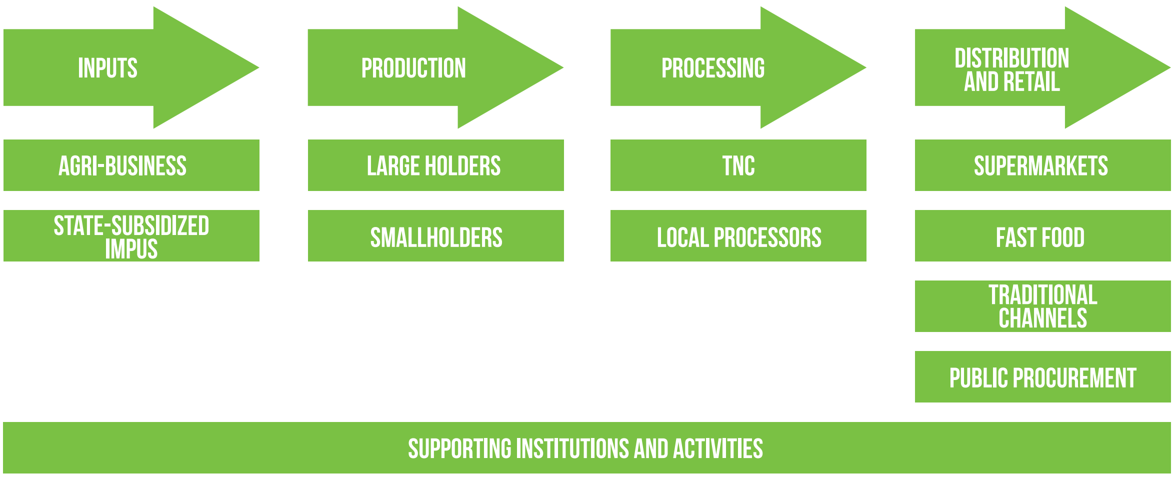
Food systems throughout the world have undergone massive transformations during the last 30 years, particularly in developing countries, as large, often multinational firms have extended their reach over the management of food supply chains. Even as "globalization" has become taken-for-granted as a defining characteristic of today's food system, it is not immediately obvious specifically why, how and what global economic processes are transmitted to the local level. In this report, we will explore these links through an analysis of how the consolidation and globalization of agri-food value chains, in which large and powerful "lead firms" coordinate flows of agricultural commodities, has transformed the political economic context of agricultural production, processing and distribution. These shifts in the context of the food system towards private ownership, consolidated market structure and quality-based competition have important implications for food system outcomes, including food availability, access and utilization (Ericksen, 2008). They have also redefined the role of the state in ensuring that households can securely access appropriate food options.

What is driving inequalities in the food system? To what extent do public policies promote or undermine more equal outcomes for both producers and consumers in the food system? This paper will identify transformations in the food systems of Brazil, India, Mexico and South Africa and consider the extent to which public policies have successfully mitigated inequalities and adverse outcomes facing both producers and consumers of food. First, we provide an overview of recent transformations in food systems and outline how the global value chain framework helps to understand changing power dynamics within the food system and particular challenges facing smallholders in Brazil, India, Mexico and South Africa. Next, we describe how class, gender and spatial inequalities affect the food systems of these four countries and generate specific challenges producers and consumers of food. After that, we will analyze the extent to which public policies in each of these four countries have addressed inequalities throughout the food system and consider the strengths and weaknesses of these approaches. Finally, we will draw some lessons about public policies to promote more food security and inclusive development outcomes in unequal and globalizing food systems.

2. BRAZIL, INDIA, MEXICO AND SOUTH AFRICA IN AGRI-FOOD GLOBAL VALUE CHAINS

Understanding how public policies can promote a more inclusive and equitable food system in Brazil, India, Mexico and South Africa requires not only an analysis of existing policy efforts in these countries but also a firm grasp of the social and economic forces driving changes in the food system. With respect to the later, we will turn to the global value chain (GVC) framework to explain links between changing agro-industry structures and shifting power relations in the food system, typically in favor of powerful and highly capitalized private firms. The GVC framework represents the food system as an input-output structure that spans multiple segments: agricultural inputs through cultivation, processing, and distribution and retail. Within each of these major value chain activities, multiple actors may participate (see Figure 1). Relations between these actors are shaped by a broader institutional context, which includes both public policies and the standards and certification procedures that govern relationships among firms and their suppliers. In the production segment, smallholders exist alongside and may compete with large holders of land. Consumers may access food through either "traditional" channels such as small-scale retail or farmers markets, modern supermarket or fast food outlets, or in some cases through state-managed mechanisms of procurement and distribution. The GVC framework helps to understand how changes in the industrial structure and governance dynamics of different segments of the chain, linked to technological change and deregulation, have major implications for actors in other segments of the chain. For example, consolidation and the implementation of modern supply chain management techniques in the agri-processing and retailing segments have drastically transformed the markets on which many small farmers rely for their livelihoods (Gereffi & Christian, 2010; Memedovic & Shepherd, 2009; von Braun & Díaz-Bonilla, 2008). The "global" aspect of the framework highlights not only the role of international trade in restructuring and integrating food systems, but also the role of foreign direct investment in driving consolidation in processing, distribution, retail and food service (Christian & Gereffi, 2010; Gereffi, 2013; Reardon, 2011). Even in circumstances where global forces are less decisive in restructuring production systems (for example, even as it is rapidly transforming, India's agri-food system remains in some ways less "globalized" than those of Brazil, Mexico and South Africa), value chain analysis can indicate how changing input-output relationships and governance dynamics among domestic firms shift the opportunities and risks facing both smallholders and consumers of food.

FIGURE 1: **ACTORS IN AGRICULTURAL GLOBAL VALUE CHAINS**



Source: Adapted from Gereffi and Christian 2010

How did highly consolidated, TNC-dominated value chains come to control large parts of the food systems of Brazil, Mexico, South Africa and to a lesser – but growing – extent India? From the 1930's through the 1970's, government marketing boards in each of the four countries organized the procurement and wholesale distribution of key commodities and set support prices in a way that was beneficial (or at least predictable) for small farmers. During the Washington Consensus years of the 1980's and 1990's, these sorts of risk management mechanisms have been dismantled under the aegis of neoliberal reform. The World Trade Organization (WTO) Agreement on Agriculture, which requires liberalized market access rules and restrictions on export subsides, also drove the adoption of neoliberal policies by taking interventionist measures off the table as tools for improving outcomes in the food system.[1] Throughout the world, the reduction of import and export tariffs on food as well as the reduction of state-managed stockpiles of food has led to an expansion of food trade, but also greatly opened up national food systems to global price shocks. In addition – and perhaps more importantly – state assets were sold off, and foreign direct investment (FDI) was liberalized, allowing for the rapid entry of large agribusiness TNCs and allowing incipient domestic retail and large agri-processing chains to access vast quantities of capital through global financial markets.

These policy shifts had important implications for the food systems of Brazil, India, Mexico and South Africa. For example, the implementation of the North American Free Trade Agreement (NAFTA) in Mexico led to the dismantling of the National Company of Popular Subsistence (CONASUPO), the state-owned agricultural processing and trading enterprise that was mandated with the dual tasks of regulating the production and distribution of staples through the elimination of intermediaries as well as protecting the food security of low- income producers and consumers (Yunez-Naude, 2003). In Brazil, the Minimum Price Program, through which the government purchased substantial quantities of staple agricultural products, was repealed in the late 1980's, followed by the elimination of parastatal marketing boards governing the distribution and export of key commodities such as sugar, wheat and coffee (Smith, 1997). In South Africa, the Agricultural Marketing Act of 1996 disassembled the network of state-managed marketing infrastructure linking agricultural co-operatives, processors, and various marketing boards, replacing it with a single national board whose aim is to roll back regulations on agricultural markets (Groenewald, 2000). Though the pre-1996 system was completely exclusionary with respect to black farmers, the new system has no modalities in place through which to promote inclusion, instead relying on private-sector mechanisms to organize the agricultural economy. In India, processing activities were "de-reserved" from small domestic enterprises in 1998, and this action was followed by rapid consolidation and growth within the formal agri-processing sector (Reardon, Timmer, et al., 2012). Nevertheless India remains a unique case. FDI in multi-brand retail remains highly regulated in India, so small-scale owner-operated outlets still dominate food retail, though domestically owned supermarket chains are rapidly expanding. Additionally, the Public Distribution System (PDS) has retained a strong position for the state in managing rice supply chains in India.

Thus, with some important exceptions, the role of the state has been redefined from being a regulator of markets and a direct procurer and distributor of staple foods – that is, maintaining an active role in production and distribution activities – to primarily overseeing the consumption side of value chains, for example ensuring that marketed food meets minimum health and safety standards and managing food security challenges through social policies such as cash and in-kind transfers.

To what extent have neoliberal reforms and consolidated industry structures reshaped the food systems of Brazil, India, Mexico and South Africa? Table 1 compares these four countries along different indicators of GVC

[1] These restrictions on export subsidies are unequally enforced. Agricultural subsidies on the part of the United States and EU have not been repealed, contrary to WTO rules.

penetration in the food system. With respect to inputs into the food system, all four of the countries have seen declining state investments in agriculture, as well as a growing reliance on internationally sourced fertilizers (a similar trend holds for seeds). These trends are consistent with neoliberal prescriptions to reduce the role of the state in the economy and liberalize trade in previously highly protected areas. In addition, agricultural production in all four countries has grown increasingly tied to international markets, as reflected by the growth of trade as a share of agricultural GDP in all four countries.[2] Though international trade still plays a small role in the Indian food system, the rate of growth in the country's agricultural trade was especially rapid, between 2000 and 2011. Though circumstances vary from crop to crop, smallholders typically have greater difficulty engaging in export agriculture than large commercial operations (see the following section), so intensified agricultural trade – while it may benefit consumers by reducing retail prices and expanding choice – signals additional challenges for smallholders. In all four countries, there has also been consolidation within downstream segments of the value chain (processing, retail and food service) as large lead firms have consolidated their oligopolistic positions through mergers and acquisitions. Large firms are active in the food processing and branding, such as Nestle, and in the selling of food in large chains, such as Shoprite in South Africa or Walmex (a subsidy of Wal-Mart) in Mexico. South Africa faces particularly high levels of market concentration in these segments. In India, on the other hand, packaged food sales (the bread and butter of agri- processing TNCs) remain nearly insignificant, and chained retail and food service outlets capture a tiny (though quickly growing) slice of overall food sales. Small-scale establishments known as kirana still dominate food retailing in India. Nevertheless, this segment is consolidating rapidly as domestic conglomerates such as Reliance, Bharti and Tata begin to invest excess capital from their activities in other industries in constructing supermarkets and building out modern supply chains to the farming sector (Reardon et al., 2012). In the following section, we will discuss how these trends of consolidation and globalization generate new challenges in the market environment facing smallholders in the four countries, and how these challenges in turn can negatively impact or reinforce existing inequalities.

TABLE 1: **INDICATORS OF GVC ENGAGEMENT FOR BRAZIL, INDIA, MEXICO AND SOUTH AFRICA**

	Indicators	Brazil	India	Mexico	South Africa
Inputs	Agriculture as a share of total government spending (percentage change 1980-2007)	2.1% (-68%)	5.0% (-31%)	1.8% (-75%)	N/A
Production	Ratio of agricultural imports to agricultural GDP (% change 2000-2011)	5.5% (-40%)	6.5% (131%)	54% (62%)	29% (57%)
	Ratio of agricultural exports to agricultural GDP (% change 2000-2011)	40% (46%)	11% (135%)	44% (64%)	31% (8%)
Processing	Market share, top 3 packaged food brands (% change 2004-2013	18% (25%)	16% (12%)	21% (5%)	29% (4%)
	% packaged versus unpackaged food sales	30.4%	1.2%	20.5%	33.1%
Marketing	Market share, top 3 grocery retailers (% change 2004-2013)	36% (18%)	1.2% (500%)	34% (15%)	44.9% (35%)
	% chained restaurants (% change 2000-2013)	31% (107%)	5% (157%)	49% (58%)	72% (-19%)

Source: FAOSTAT 2014, FAO 2012, Euromonitor 2012

[2] In Brazil, imports of food have declined. Nevertheless, gross trade (imports plus exports) has grown in Brazil.

3. GOVERNANCE, FOOD QUALITY STANDARDS AND SMALLHOLDER INCLUSIVENESS

As government marketing boards and minimum prices supports have been withdrawn, systems of private governance increasingly set the terms by which farmers, small or otherwise, may access markets for their products. The companies that set the terms of these new governance dynamics are called "lead firms." These include powerful TNCs in the retail segment, including Wal-Mart and Carrefour, as well as the processing segment, such as the food and beverage conglomerate Nestlé and the commodities trader Cargill. In Brazil, India, Mexico and South Africa, several domestically owned corporations also serve as lead firms in agrifood chains. Within the processing segment, several domestic branded manufacturers such as Grupo Lala (dairy) and Gruma (tortillas) in Mexico and JBS (meats) and Brasil Foods (packaged foods) in Brazil dominate particular product markets, granting them monopsonistic[3] power with respect to farmers. In recent years, some of these firms have themselves acquired facilities in other countries, becoming multinational firms themselves. Domestic retail companies have also emerged as lead firms in some food chains, especially Brazil and South Africa where three of the top five food retailers are multinational corporations (Euromonitor 2013). India is unique in having a major state-owned lead firm, the Food Corporation of India, which manages the grain supply chains which comprise the Public Distribution System. Though much of the discussion has focused on the implications of retail consolidation for producers, this trend affects consumers as well. In South Africa, for example, sixty present of food retail is restricted to four supermarket chains (Du Toit and Loate, 2014).

Consolidation not only grants lead firms market power over their suppliers, but it also allows them to set new modes of governance which define both the terms of by which farmers are included in or excluded from supply chains as well as the economic returns that they receive for their products. Large agri-processing companies and retailers place a number of requirements on suppliers along multiple dimensions, which commonly include quality, seed variety, cost, appearance, traceability, pesticide use, safety, short lead times, organic and other certifications, and year-round availability of supply (Dolan & Humphrey, 2004; Kaplinksy, 2010; Lee et al., 2010). Lead firms may also place pressure on suppliers to reduce the prices at which they sell their products. Private standards allow lead firms to reduce costs and risks along their supply chains, but they also typically make it more difficult for smallholders to market their products on favorable terms. This is because small-scale farmers lack the scale and financial resources to undertake the capital-intensive production methods necessary to comply with private sourcing standards. Instead, large commercial operations have come to dominate the supply base for many processors and retailers (Kaplinksy, 2010; Lee et al., 2010; Reardon, 2011; Reardon et al., 2009). For example, evidence from the Brazilian poultry, dairy, horticulture and other industries indicate that consolidation in the retail and processing segments has led to smallholder exclusion from supply chains(Farina et al., 2005; World Bank, 2001). Where small farmers have remained suppliers to lead firms in consolidated segments of the value chain, they often face adverse dwindling returns as more powerful downstream players are able to use their market power to drive down prices paid to producers. The example of Mexican corn tortillas is emblematic. Whereas large branded manufacturers such as Minsa and Gruma

[3] Whereas monopolistic power refers to cases when there is a single seller of a product, monopsony refers to instances when there is a single buyer.

(Maseca) sell tortillas for US$0.93 per kilogram, producers receive only US$0.15 per kilogram of corn sold (El Barzon, 2013). Furthermore, marginalization is enhanced by historic exclusions that also increase inequality and poverty (Philip, 2010).

The tightening of food safety regulations on the public side has also made it more difficult for smallholders to retain access to established markets. For example, small dairy farmers in India have been far less likely than large dairy farmers to institute food safety practices, limiting their ability to retain market access (Kumar et al., 2011). Strict food safety standards in export markets, such as EUREPGAP in the European Union and the HACCP system in the US, have also presented barriers to smallholders who were previously able to sell into export markets. For example, small producers of fresh fruits and vegetables in Brazil and Mexico have lost access to US and European markets due to heightened food safety standards (Lee et al., 2010; Reardon et al., 2009). Obviously, such safety regulations generate enormous public health benefits for consumers; however the systems required in order to guarantee compliance with these standards often end up being exclusionary to smallholders in the absence of institutions to connect small farmers to markets for their products.

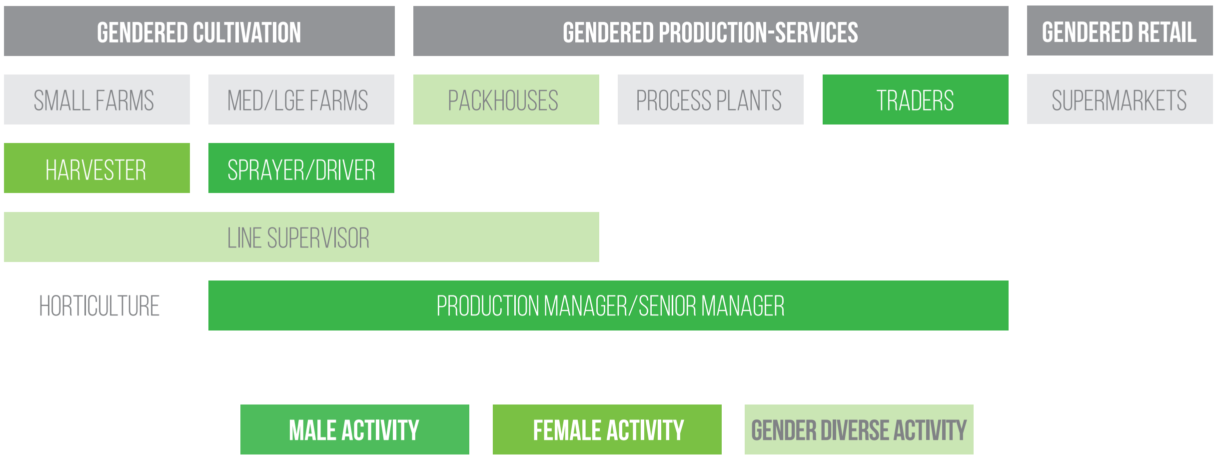
4. GLOBAL VALUE CHAINS AND INEQUALITY

As agri-food systems become increasingly globalized, many inequalities emerge in the system. Some inequalities, such as gender inequalities have long histories closely related to the social structure within nations. Others, such as class and spatial inequality emerge as a mixture of global production and local legacies. The globalized agrifoods system creates a system where certain actors, often large firms or those who traditionally have been advantaged, are able to leverage their position for greater economic gains and political power while those who are traditionally excluded remain further marginalized. This section seeks to introduce these inequalities in terms of GVC analysis and identify how the framework can help observers garner deeper understandings of disparate outcomes in the food system along gender, spatial and class lines. Despite often being studied as separate types of inequalities, none of these exist in a vacuum and often the disparities are a manifestation of intersections of multiple types of inequality simultaneously impacting the livelihoods of individuals. For example, female farmers may suffer from lower class standing and geographic isolation in addition to gender disparities. Additionally, farmers that are separated from markets and consumers often suffer from economic vulnerability and marginalization as well as limited access to inputs or capital to upgrade their operations.

GENDER INEQUALITIES

Power dynamics along value chains emerge in the division of labor across different chain segments and often create situations that further marginalize women, especially rural and indigenous women. While present in GVC activities, it is important to note that these divisions and inequalities are preexisting conditions that emerge into chains and often are embedded in histories of social organization within countries. Figure 2 shows, even as men and women share some activities, several agricultural activities are divided along gender lines. Traditional societal structures often track men and women into different parts of the chain, and women are typically directed into activities that receive lower remuneration (Christian et al., 2013). These divisions have impacts when it comes to income, access to land and the ability to have a voice in the decision making process of rural communities. Figure 2 demonstrates the differences in GVC participation along gender lines in horticulture. Activities in horticulture are representative of general agricultural trends, and are gendered with men being overrepresented in trading, managing, and other activities that are higher valued both monetarily and also in the ability to create decisions. Females are overrepresented in harvesting task and are overrepresented in the landless informal economy as well. For example, female agricultural workers in India are more likely than men to find themselves performing casual labor (World Bank, 2008).

FIGURE 2: **GENDERED ACTIVITY IN HORTICULTURE**



Source: Christian, Evers and Barrientos 2013

Gendered divisions of labor create further inequalities and challenges for women in food systems and are often routed in longstanding social organization patterns. For example, the gendered notion of females as caregivers means that females bear the burden of responsibility for complying with many of the social protection policy stipulations around school attendance and child health, like those in Oportunidades in Mexico and Bolsa Família in Brazil.

Women are disproportionately represented in the landless rural population who face food insecurity and inability to meet basic needs (Oxfam, 2013b). Despite producing half the food grown globally, females are disproportionately the victims of land grabs by large corporations and are pushed into wage farm labor and perpetual precarious livelihoods (Ibid). Further, land tenure laws often restrict their access to land or the ability to participate in the decision making process regarding land use (Ibid.). This is problematic because it makes them increasingly unprotected against abuses in the workplace and limits their access to the capacity building necessary to improve livelihoods (Staritz & Reis, 2013). Despite these challenges, the international policy community sees the importance of higher integration of women into agriculture value chains. The FAO's 2010-2011 State of Food and Agriculture report revealed that if developing nations raised female farmers access to resources to the level of men (approximately a 20-30% increase) domestic agriculture production would increase by 2.5 -4% and would reduce global hunger by as much as 17 percent (FAO, 2011). This is increasingly crucial as raising populations and changing diets are increasing the need for food across the globe (Gereffi & Christian, 2010; Godfray et al., 2010).

Despite the evidence of the need for greater female participation in agriculture to boost productivity and meet the demands of a growing world, until social transformation occur which help to empower females – not only through the granting of land and increased monetary compensation but also in social relations – gender inequality will remain a problematic feature of the agri-food sector.

SPATIAL INEQUALITIES

Policies to empower those in poverty also often have diverse impacts along geographic lines. Those living in rural areas often enjoy fewer of the social policy rewards than their urban counterparts. Urban residents benefit from higher levels of government investment in infrastructure than those in rural areas and face fewer barriers with respect to gaining access to social policy benefits than their remote counterparts in rural areas. This becomes important in the agri-food sector because social services in the city, along with challenges in farming policy, encourage migration into the cities. For example, in a study of rural Indian farmers found that many choose desire higher levels of formal education, similar to urban centers, for their children instead of learning farming methods. The end goal is for children to find civil service work that is seen as more prestigious and profitable than rural farming. However, a consequence of this is that the children, even those that did not end up in civil service positions, often preferred urban environments, choosing to leave rural areas for centers with greater opportunities. This furthers the gap between rural and urban areas as those in rural areas are no longer able to adopt agrarian work and often cannot find jobs on the formal labor market (Morarji, 2010). Additionally, the lack of infrastructure and storage in rural areas results in higher amounts of food wastage and limited social services (Mukherji, 2013). As a result, there is often a divide between the services and opportunities in urban centers and rural areas. The limited opportunities also increase rural- urban migration, placing even greater strain on urban social services and increasing poverty in urban centers.

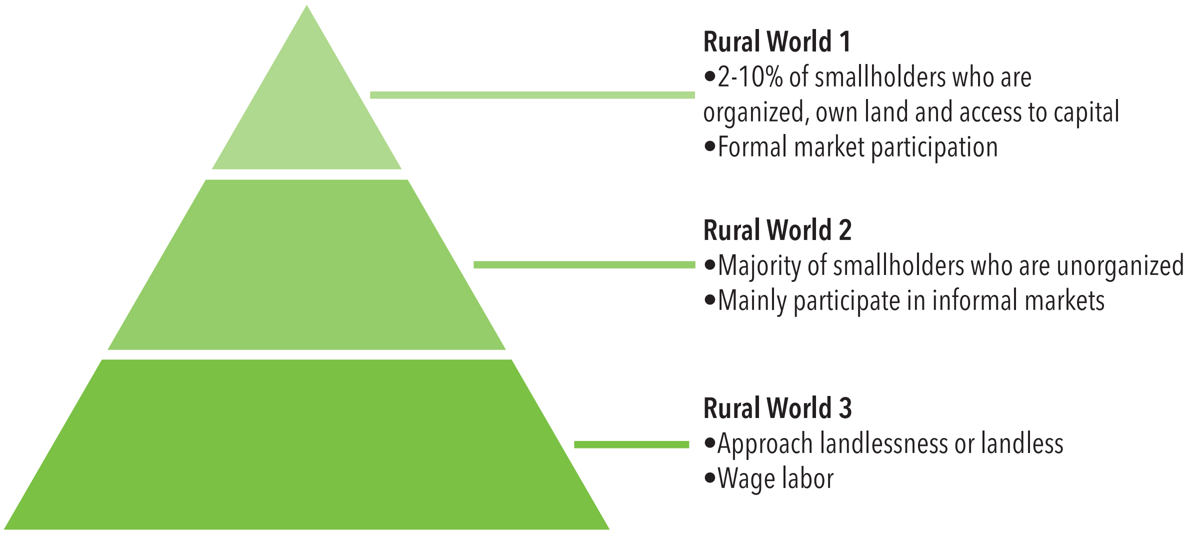
In addition to the differences in urban and rural communities, spatial inequality also is evident on a global level with different nations and regions often specialize in particular activities within GVCs. Global production allows for economic rewards to be concentrated in certain regions while smallholders in developing and emerging economics are often squeezed, making too low an income to survive. Multinational processers, retailers and brands, headquartered in the Global North, often retain greater profits and are able to set market prices for consumers and buying prices for producers. This allows for profits to be retained in urban centers and within developed nations while marginalized groups continue struggling in global economies to grow or improve livelihoods (McMichael, 2009; Talbot, 1997). For example, in 2011 Argentina cited Archer Daniels Midland (ADM), Bunge, Cargill and Louis Dreyfus as guilty of massive tax avoidance in the country (Lawrence, 2011). In 2013 Brazil also found ADM guilty of tax evasion (Heard & Bettles, 2014). These cases highlight the ability of firms headquartered in developed countries to leverage preferential agreements regarding tax policy and engage in activities that limit the recirculation of revenue in countries where they invest.

Finally, inequality arises in terms of distance. Producers in Brazil, India, Mexico and South Africa often are isolated from their land, markets, and consumers. Land grabs and acquisitions by large firms are pushing farmers further into landless wage labor. By owning land, large agriculture firms, such as Cargill, are able to invest in emerging non-food agricultural products, such as biofuels and also to control greater shares of the agriculture market. The trend towards land concentration among large firms is further marginalizing smallholders, pushing them into situations where they do not own the land they work and are forced to depend on wage labor for their livelihood, rather than subsistence models or selling their goods at markets (Oxfam, 2013). In addition to being isolated from their land, producers are also often isolated from markets. The rise of supermarkets and consolidation among food processors is pushing many growers to sell in small or informal markets or to large monopolistic buyers. With limited access to markets, smallholders are unable to set prices and are often constricted by the regulations and standards of retailers. Finally, this increases the distance between producers and consumers, creating a global system where food comes from across the globe put with little connection to the producers who make the food (Clapp, 2014; Kloppenburg et al., 1996).

ECONOMIC INEQUALITIES

Finally, divisions along economic lines[4] are readily apparent in contemporary agri-food chains. Within the food system, there are several types of producers, including large corporations that own vast tracks of land in multiple countries and have the ability to influence policy on multiple levels (local, national, regional and international); elite farmers who have large tracks of land and can sell to global retailers; small land holders who are largely subsistence farmers; and landless populations who are often forced into positions of wage labor. Oxfam utilizes a model of three rural worlds to help conceptualize differences among smallholders in terms of their participation in formal market, and outcomes in participating in the current food systems (see figure 3).

FIGURE 2: **GENDERED ACTIVITY IN HORTICULTURE**



Source: Oxfam, 2013

Increasingly, power and economic gains are concentrating at the top of the pyramid while the number of marginalized farmers at the middle and bottom sections is growing (Oxfam, 2013). The current agri-food system inherently benefits the few that are able to access the required capital in order to make the sorts of investments necessary to comply with large buyers' supplier requirements. Women and other marginalized groups are often overrepresented in the third rural world and suffer from the inability to enter formal markets which would increase economic returns and help to address issues of inequality (Ibid.). Many issues prevent those in the bottom of the pyramid from moving into the top rural world. For example, these farmers are often operating in the context of social relations that have long histories of

[4] Here we utilize the Weberian notion of class to explore economic inequalities. Weber's idea of class is based around people's relationship to markets.

exclusion and traditions of marginalization. In South Africa, those in the third rural world are disproportionately black and still dealing with the ramifications of a long history of Apartheid and racialized colonial legacies. In Brazil, they are disproportionately found in the Northeast, and particularly among indigenous and Afro-Brazilian communities. As a result of class differences among smallholders there is an inherent inequality in the countryside, which also must be addressed before meaningful reform, and inequality reduction can occur.

Globalization in food systems is creating changes where inequality is increasing, especially among traditionally disenfranchised groups. Participation in value chains can represent a source of growth for smallholders, but only a small percentage have been able to successful integrate in chains while many struggle to gain the access to land and capital needed for formal market participation. Inequality is a complex issue with many causes and consequences. However, by using a value chain approach to understand how inequality plays out within larger agri-food systems, policy makers and civil society actors can make targeted interventions to help empower many marginalized farmers.

5. CASE STUDIES: PUBLIC POLICIES AND FOOD SYSTEM INEQUALITY IN BRAZIL, INDIA, MEXICO AND SOUTH AFRICA

In this section we take a more particualarized view of interventions in Brazil, India, Mexico and South Africa by examining the nexus of value chain participation, public policy and inequality in each. Each case is divided into four sections. We first introduce the cases, identifying key features of the agricultural economies of each country and contextualizing major challenges with respect to inequality, poverty and food insecurity. In this section, we include a table briefly summarizing key indicators of inequality, food insecurity and poverty, including for rural areas.[5] We then provide an overview of relevant social and structural policies in the food system, and their impacts on inequality and food insecurity. We conclude each case examination by highlighting emerging policy discussions and highlighting areas that need further consideration as the countries move to address issues of inequality and food insecurity.

BRAZIL

In recent years Brazil has gained widespread recognition for its efforts to combat inequality and food insecurity (Bruera, 2013; FAO, 2007; IPC-IG/WFP, 2013; Oxfam, 2010; UNHRC, 2014). Though its income distribution remains one of the most unequal in the world, Brazil is widely known for its Fome Zero (Zero Hunger) program to combat national food insecurity, the cornerstone of which is the Bolsa Familia (Family Stipend) cash-transfer program, an important policy tool for the reduction of poverty and inequality. In addition, while the Brazilian

[5] Note that official poverty lines vary dramatically from one country to the next. For example, in Brazil a household is considered to be in poverty if household income is less than BR$140 (roughly USD$70) per month. In India, on the other hand, this figure is only INR$1,000 (US$17) per month. The variation in national poverty lines is a reflection of both the standard of living in each country as well as political negotiations over the meaning of "poverty." In order to account for this wide variation in definitions of poverty, we have also indicated the share of the population living below $2 per day at purchasing power parity, which reflects the United Nations' definition of poverty and is meant as an absolute measure of poverty, regardless of national context.

agricultural sector remains largely under the ownership of global corporate players, the government has introduced a number of meaningful programs to improve the livelihoods of small farmers. These policy efforts to promote a more inclusive food system have been formulated and implemented by the National Food and Nutrition Security System (SISAN). Crucially, SISAN includes a formal mechanism, known as CONSEA (National Council on Food and Nutrition Security), for civil society organizations (CSOs) to participate in deliberations with ministerial policy-makers. CONSEA has championed the interests of the rural poor within SISAN and has played a leading role in guiding the trajectory of Brazilian policymaking towards the goal of a more inclusive food system (Government of Brazil, 2013; Leão & Maluf, 2012).

Indicators of Poverty and Inequality: Brazil	
Population	200.3 million (2013)
Rural Population (% of Total Population)	15% (2013)
% of Population Food Insecure	13%* (2010)
Gini Coefficient	53 (2012)
Income share held by top 10 %	43% (2010)
% of Population below National Poverty Line	16 % (2009)
% of Population below $2 a day (PPP)	11% (2009)
% of Rural Population below National Poverty Line	32% (2009)

* Includes only those facing moderate or heavy food insecurity
Source: (IFPRI, 2013; IPEA, 2011; Telles, 2013; World Bank, 2013)

In spite of these efforts, Brazil still faces a number of challenges with respect to promoting an equitable and inclusive food system. While policy interventions and robust economic growth have successfully combatted the most extreme examples of poverty and malnutrition, Brazilians living in rural areas – particularly in the Northeast region of the country, where poverty and inequality are higher than the national average – continue to experience precarious livelihoods (IPEA, 2011). The percentage of rural households living in poverty is nearly twice the national average. Additionally, large gender-based inequalities persist in the rural economy, which reduce women's power not only in the marketplace but also in family life. Women account for slightly less than 30% of rural workers and own only 12% of the country's agricultural properties (IBGE, 2006, 2010). Finally, due to a lack of serious land reform in Brazil, land remains highly concentrated in the hands of only a few owners, and leaving many rural families landless. Very large landholdings of more than 1,000 hectares comprise only 0.9% of country's farm units but 45% of its agricultural area (Nehring & McKay, 2013; Telles, 2013). In spite of a suite of policies to combat poverty and support family farming, massive inequalities remain in both the production and consumption of food.

SOCIAL POLICIES

Since 2002, Brazil has pursued several social policies which have contributed to the subsequent decline in poverty and inequality. First, the Bolsa Familia program provides cash transfers to nearly 13 million families (nearly a quarter of the population) whose monthly income is less than R$140 per person (Leão and Maluf 2012). In order to promote improved health and education outcomes, these transfers are provided only under the condition that children are vaccinated and attend school. In addition, Bolsa Família helps to address gender-based inequalities by preferentially directing the transfers to women, who comprise more than 90% of the beneficiaries (Lindert et al., 2007). The management of Bolsa Família is recognized for its efficiency by both Brazilian citizens and international observers; the cost of the program amounts to only 0.39% of GDP (Telles, 2013).

Though Bolsa Família has proven to be an effective approach to reducing poverty, the most important social policy with respect to reducing income inequality across Brazil has been a set of progressive increases in the minimum wage (Telles 2013). The federal government has ratcheted up the minimum wage from less than R$147 per month in 2000 to R$724 in 2014, an increase of more than 400% (Brasil, 2013). However, increases in the minimum wage benefit men more than women on average. Women's participation in the labor force, at 59%, is far below that of men, 82% (IPEA, 2011). In addition, women are overrepresented in the informal labor market, where employers do not necessarily comply with the official minimum wage; the ILO (2012)estimates that 46% of working women are engaged in informal employment, compared to 39% of men, further underlining the extent of gender inequalities in the Brazilian labor market.

Aside from these programs which focus on augmenting incomes, Brazil has instituted a handful of social policies which use in-kind transfers to combat food and nutritional insecurity. Through the Food Acquisition Program (PAA), federal government agencies may purchase food (both fresh and processed) directly from smallholders to be used for food assistance, stockpiling, and supplying cafeterias in universities, military barracks, etc. In addition, the National School Nutrition Program (PNAE) provides free, nutritious meals for schoolchildren. Both PNAE and PAA have been designed in order to create markets for and promote capability building among family farms.

STRUCTURAL POLICIES

As indicated above, the agricultural sector in Brazil is dualized; a handful of large and well-resourced farms exist alongside a large number of smaller operations. This dichotomy in Brazil's is reflected in the way that the agricultural sector is regulated; the Ministry of Agriculture creates policies oriented towards larger agri-business enterprises, the Ministry of Agrarian Development specifically caters to the needs of family farmers (Junker & Schutz, 2011).

Large agribusiness firms account for 62% of the value of Brazil's agricultural production and the vast majority of the country's agricultural exports (Chmielewska and Sousa, 2011). These firms are more likely than family farmers to comply with the certifications and standards necessary to gain access to GVCs. They are responsible for the vast majority of the production of high-volume agricultural exports including soy, raw sugar, fruits and vegetables and meat, and they rely on GVCs to provide consistent demand for their products. In order to gain access to GVCs, many large agricultural entities have developed close relationships with global lead firms in the processing and trading segments of agri-food and agri-industrial value chains, including Bunge, Cargill, Louis Dreyfus and the Chinese state-owned COFCO (Wilkinson, 2009). At the same time, several "national champions," including Brasil Foods and JBS Agrícola have emerged in the production and processing segments of the chain, selling to both domestic and foreign markets.

Though such patterns of trade and investment have emerged in the context of a liberalized agricultural sector with only modest use of subsidies and price supports, the Brazilian state has engaged in policies to promote the large-scale cultivation of bulk commodity crops. For example, longstanding government investments in agricultural research and development (R&D) allowed for the cultivation of acidic soils that were previously unsuitable for soy cultivation, thus laying the technological groundwork for the large, export-oriented soybean plantations of today (Deininger & Byerlee, 2011). In addition, large agribusiness entities, including multinational corporations, have benefited from the support of the Brazilian government for the production of sugarcane-based ethanol. For example, in 2013 the government decided to grant tax breaks and continue its policy of offering cheap credit to ethanol mills in Brazil (Rabello et al., 2013). These policies are supplemented by the activities of Brazil's state-owned development bank, the National Bank for Economic and Social Development (BNDES), which offers subsidized storage loans to ethanol millers, distilleries and ethanol cooperatives (Valdes, 2011). Upstream in the value chain, within the production segment, such policies serve to disproportionately benefit large landholders rather than small farmers. Since the 1990's small farmers have been largely excluded from sugar value chains (for both refined sugar and ethanol), as mills and distilleries have acquired land in order to vertically integrate backward into sugar cultivation, a process which has been linked to violations of indigenous land rights, forced removal of peasants and other human rights violations (Oxfam, 2013c). Mills and distilleries now own roughly two-thirds of the land which is cultivated for sugar in Brazil (Valdes, 2011). Through FDI, several of these mills are themselves partially owned by multinational energy and commodities trading companies, including Shell, BP, Louis Dreyfus, ADM and others, which together account for 23% of ethanol production in Brazil (ECLAC, 2012). In spite of the growing global competitiveness of the Brazilian sugar-ethanol sector, however, the shift to large-scale, "modern" sugar cultivation has not necessarily had a positive impact on the livelihoods of rural workers; labor conditions on Brazil's sugar plantations remain poor, with low wages, high turnover, widespread violations of worker safety and sometimes conditions that are legally defined to be "slave-like" (Coslovsky & Locke, 2013; da Silva Filho & Queiroz, 2013).

Family farms, representing 4.4 million families and 85% of the country's rural establishments, account for 70% of national food production and 77% of rural employment (IPC-IG/WFP, 2013; Chmielewska and Sousa, 2011). Whereas large farms typically enjoy organized market channels that are governed by tight certifications, standards and production schedules, small farmers face less structured markets. Intermediaries, who typically offer relatively low prices to farmers, constitute the main market for small farmers (IPC-IG/WPF 2013). In order to promote smallholder capabilities in the context of a food system increasingly characterized by quality-driven value chains, the Ministry of Agrarian Development in concert with the SISAN has instituted a number of policies. First, the aforementioned PAA and PNAE programs have been designed in order to offer preferential market access to small farmers for government procurements. The PAA sources exclusively from smallholders, purchasing only from farmers' organizations in order to create incentives for capacity building and scale-pooling. The PNAE, which is managed by municipal rather than federal agencies, requires that 30% of the food sourced for student meals are sourced from local farmers, though compliance is patchy (Saraiva et al., 2013). The program provides a way for farmers to learn about quality standards and price references, effectively providing a learning mechanism for smallholders to better bargain with intermediaries and large buyers in chains led by private processors and retailers (CAISAN, 2014; IPC-IG/WFP, 2013). Finally, while PAA and PNAE serve to create demand for smallholder farmers' products, the National Program for Strengthening Family Agriculture (PRONAF) seeks expand access to productive inputs through the provision of credit. PRONAF is overseen by the Ministry of Agrarian Development (MDA) and distributes funds through public banks to finance both individual and collective projects submitted by family farmers. PRONAF sets interest rates according to the economic status of farmers (poorer farmers receive lower rates) and the environmental conditions they face. In spite of these important financial commitments on the part of the State, smallholders remain underrepresented in credit markets. Family farmers only receive about 25% of available agricultural credit (IPC-IG/WFP, 2013).

To conclude, Brazil has developed a number of innovative policies to combat inequality and support smallholder farmers, thanks to a system of policy-formation and implementation which involves both government and CSO actors at the national-, state- and local-levels. By creating policies specifically focused on supporting the capabilities of smallholder farmers and linking these to the consumption-based initiatives of Brazil's food security system, such as the PAA and PNAE, Brazil has indicated a creative, if still small and tentative, approach to promoting a more just and equal food system. Nevertheless, there remains much to do. Though aggressive social policies have narrowed the income gap, Brazil remains one of the most unequal countries in the world. In addition, large farmers enjoy a privileged position within the food system with respect to smallholders, as they can more easily comply with the certifications and quality standards that govern access to export markets and increasingly prevalent retail chains.

INDIA

Agriculture comprises a much larger share of employment (47%) and GDP (18%) in India than the other cases in this document, though these percentages are declining over time as the country continues to urbanize and the service sector grows (Acharya, 2014; World Bank, 2013). In contrast to the other cases, private-sector supply chains are far less consolidated in India (Reardon, Chen, et al., 2012). Midstream and downstream segments of food value chains such as processing or milling, wholesaling and retailing exhibit less market concentration and have received less private investment in India than in the comparison countries. Furthermore, the state plays a larger role in structuring the Indian food system through the procurement of staple grains (rice, wheat and millet) through the Targeted Public Distribution System (PDS), the largest food safety net program in the world and the country's main policy tool for combatting food insecurity (Kishore et al., 2014).

It is difficult to precisely evaluate India's performance with respect to food security and inequality due to a lack of reliable data; however existing statistics indicate that inequality and poverty remain serious problems and present important obstacles to achieving food security. Indeed, compared to the Brazil, Mexico and South Africa, India contains far more people, in both absolute and relative terms, living below $2 per day, indicating an especially high incidence of poverty. Estimates of inequality based on expenditures indicate a modest Gini coefficient of 0.35; however recent estimates based on incomes suggest a Gini coefficient of 0.53, among the very highest in the world (Dubochet, 2013). Certain disadvantaged groups in particular are excluded from by India's otherwise steady economic growth, as social discrimination along caste, tribal, gender and religious lines remains pervasive. For example, poverty rates among Muslims, Dalits and members of indigenous tribal groups are significantly higher than average (Dubochet, 2013; Shaw, 2013). Historical gender inequalities persist as well. For example, the Hindu Succession Law was revised in 2006 to require gender equality in land and property inheritance, but implementation remains weak. In terms of agricultural production, women are more likely to face adverse terms of employment when performing agricultural work; 92% of the agricultural labor performed by women was under casual arrangements, compared to 80% of agricultural labor by men (World Bank, 2008).

Indicators of Poverty and Inequality: India	
Population	1,237 million (2013)
Rural Population (% of Total Population)	68% (2013)
% of Population Food Insecure	46%* (2010)
Gini Coefficient	32** (2010)
Income share held by top 10 %	29% (2010)
% of Population below National Poverty Line	22% (2009)
% of Population below $2 a day (PPP)	69% (2010)
% of Rural Population below National Poverty Line	26% (2009)

* Based on high-calorie definition of food insecurity
**Based on expenditures rather than income
Source: (Dubochet, 2013; IFPRI, 2013; Sharad Tandon & Landes, 2014; World Bank, 2013)

Drawing precise conclusions about food security outcomes is hampered by a lack of recent data, but existing figures indicate that food security is a major challenge in India, particularly among women and children. As of 2006, the date of the most recent National Family Health Survey, 79% of children between 6 months and 3 years old were anemic, and 45% of children less than 3 years old were stunted (NFHS, 2006).

SOCIAL POLICIES

The PDS represents the main tool by which the Indian government promotes national food security. Through the PDS, the Indian government procures staple grains from national farmers and distributes them in government-owned ration shops at a highly subsidized price to Indian households. Under enormous pressure from the Right to Food Campaign, a network of NGOs, the Parliament of India passed a historic Food Security Act in 2013, which extends the PDS in a number of ways. The Act extends the number of people covered by the PDS by 260 million people- 67% of the population is now eligible to receive subsidized grains (Sharad Tandon & Landes, 2014). To ensure that gender-based discrimination does not undermine women's right to food, ration cards are distributed to the household's oldest female member. The Food Security Act also consolidates and expands a handful of other food security programs, including the Mid-day Meals Program, a school meal program intended to improve child nutritional outcomes, and a maternity benefits program for pregnant women (Drèze 2013).

The Food Security Act enshrines access to food as a legal right held by individuals, rather than a welfare benefit allotted at the household level (Drèze, 2013). However, even as the eligibility criteria have been expanded and redefined at the individual level, the amount of food to which many beneficiaries are entitled through the PDS may decline as a result of the new Act. Previously, entitlements were distributed by household, so that households below the poverty line receive 35 kg of grains per month; under the 2013 Act, entitlements are made on an individual basis of 5 kg per person, so the 2013 Act may represent a decrease in food entitlements to many households (DPFD, 2013).

In addition to the National Food Security Act, the National Rural Employment Guarantee System (NREGS) serves as a key rights-based social protection program aimed at supplementing the cash incomes of rural households. The NREGS guarantees 100 days per year of employment at the minimum wage for every rural household. Most of the work done through NREGS is performed on public works projects, such as the construction of government buildings or land and water improvement projects. However, some states, such as Andhra Pradesh, have also experimented with projects that seek to directly remediate rural inequalities, for example bringing barren plots of land owned privately by Dalit and Adivasi households into crop cultivation (Reddy & Upendranadh, 2010).

STRUCTURAL POLICIES

Compared to the Brazil, Mexico and South Africa, the Indian food system is relatively closed off to international trade and investment patterns. Food trade as a share of agricultural GDP is relatively low, and consolidation in the processing and retail segments of the value chain is. Most food retailing is still conducted through small- scale kirana stores. The prevalence of this mode of food access is likely tied to the regulation of foreign direct investment. Despite pressure from the international business community, the Indian government still prohibits majority foreign ownership in multi-brand retail chains (Suneera Tandon, 2013), though it is unclear the extent to which this position may change in the future. Nevertheless, full foreign ownership of food processing facilities is allowed, and foreign agribusiness firms such as Nestlé, Kellogg and Mondelez as well as domestic conglomerates such as Brittania Industries and ITC have gained market share in numerous product categories in recent years (Euromonitor, 2014). While agri-food value chains coordinated by large corporate organizations remain incipient, they are growing in importance as processors and large domestic retailers begin to build out logistics networks in order to secure a steady inflow of agricultural inputs. The specific details of how this process is managed over time, both with respect to public policy and private strategies of value chain governance, will have important implications for the inclusiveness of the system to smallholders. With respect to structural policies directly targeted towards small farmers, India's policy approach remains very unclear. Though federal and state governments provide some investment in irrigation and agriculture, these are not directed towards smallholders in particular. The most direct state intervention in the food system occurs through the management of the PDS, which represents nearly 1% of total GDP, or 4%-5% of agricultural GDP (Kishore et al., 2014). Grains procured through the PDS are acquired by state governments from farmers at a minimum support price. Thus, the Food Security Act ensures a large and stable market for grain producers (though not necessarily producers of other crops). Nevertheless, the PDS does not incorporate specific mechanisms to facilitate the access of small farmers to procurement chains, so large farmers are more likely to benefit from support prices than smallholders (De Schutter, 2014).

INDIA: MOVING FORWARD

To conclude, the 2013 Food Security Act marks an important step forward in the fight against poverty and food insecurity in India by expanding entitlements to food through the PDS and reducing the risk of exclusion. Nevertheless, it is unclear the extent to which it will serve to address the structural forces driving inequality in the country, or the extent to which it will benefit smallholders. In particular, the PDS and other procurement mechanisms such as the school lunch program do not include modalities to support small farmers, who themselves constitute a substantial share of the rural poor that the PDS is meant to serve. Subsequent policy efforts should incorporate such pro-smallholder measures as a means of combating rural poverty. In addition, efforts must be expanded to ensure that small-scale farmers are able to access private markets in the slowly consolidating processing and retailing segments of the agri-food chain. Though policy efforts in this area have been weak to date, some Indian NGOs have begun to partner with large retail chains in India in order to provide the credit, procurement logistics and technical assistance necessary for these smallholders to access markets in the organized retail segment (Reardon, Timmer, et al., 2012).

MEXICO

Mexico has seen some advances along economic indicators in recent decades. Policies designed to empower marginalized groups, and increase global trade have allowed the Mexican economy to grow an average of 2.5% from 2003 to 2013 (World Bank, 2014). Despite the steady economic growth, many issues still face the nation as it moves forward. The North American Free Trade Agreement has increased poverty rates among rural and indigenous populations. Despite policies aimed at poverty reduction, Mexico struggles with high levels of inequality and concentrations of wealth, land, and power in the hands a small number of actors. Attempts at land reform, and inequality reduction have had minimal success and further interventions are necessary to improve the lives of smallholders. Currently, the rural population experiences high levels of poverty and many in the country face food insecurity or hunger, particularly in states, such as Chiapas, which are far from urban centers (Juarez & Gonzalez, 2010). Land reform, which occurred over 100 years ago, has led to large numbers of small landholders, but they do not own enough holdings to survive or be competitive in contemporary markets. Furthermore, the rise of food monopolies, such as those that control the tortilla industry, limits the ability for smallholders to capture higher prices for their product. These farmers also struggle to integrate into formal markets. Despite a handful of social and structural policies in place to address concerns in the food system, inequality still prevents many from achieving food security and enhanced livelihoods.

Indicators of Poverty and Inequality: Mexico	
Population	122.3 million (2013)
Rural Population (% of Total Population)	21 % (2013)
% of Population Food Insecure	18%* (2010)
Gini Coefficient	48.3 (2008)
Income share held by top 10 %	37.5% (2010)
% of Population below National Poverty Line	52.3 % (2012)
% of Population below $2 a day (PPP)	1.0% (2010)
% of Rural Population below National Poverty Line	63.6% (2012)

*Higher in many southern states, for example 47% of Chiapas is classified as food insecure.
Source: (El Barzon & Oxfam Mexico, 2013; IFPRI, 2013; Juarez & Gonzalez, 2010; World Bank, 2013)

In addition to the indicators mention above, it is important to note that Mexico struggles with gender inequality, particularly among rural and indigenous women, within food systems. Males are over represented in the agriculture sector with females accounting for less than 13 percent of the agriculture labor force (FAOSTAT, 2014). Females involved in agriculture often participate in vulnerable positions, with no land holdings and limited prospects for upgrading. This is a ramification of historical social arrangements that privileged males as the heads of households and as landowners. Despite shifts in the policy framework, women are often still disadvantaged compared to male counterparts in Mexico and are more vulnerable to food insecurity and/or precarious livelihoods.

SOCIAL POLICIES

Mexico is often lauded for its social policies, most notably Oportunidades. The program, established in 2002[6] grants conditional cash transfers to encourage school attendance among low income children, preventative healthcare and nutrition (Oportunidades, 2012). The program focuses heavily on traditionally marginalized groups, with women accounting for 98 percent of total participants and 68 percent of program participants living in rural areas (IDB, 2013).

While praised by many as a model for poverty reduction policy, critics question the ability of the program to reach the most marginalized of groups due to its highly individualistic orientation and inability to address many structural issues including the remoteness of indigenous populations, lack of focus on the quality of services resulting in unequal levels of ability of program participants (Ulrichs & Roelen, 2012). Furthermore, some question the responsibilities that Oportunidades places on women, fearing it could reinforce gender stereotypes, stifling attempts at gender equality (Author interviews, 2014). For example, the added burden that the program places on females can hinder social mobility and others question the ability for monetary autonomy to translate into empowerment, especially in rural areas with gender structures that extend beyond economic considerations(Milburn, 2012; Molyneux, 2006). Additionally, some question the sustainability of the program as it moves forward and argue that the ability to link the social program with broader markets is not well defined (Author interviews 2014). Continued targeted interventions, especially in sectors highly represented by marginalized groups, like agriculture, are vital to addressing issues of inequality within the nation yet more dialogue about the strategies that best empower marginalized groups and reduce existing inequalities is necessary to advance all citizens and help to increase beneficial participation in the food system.

In 2013 Mexico began a second social policy campaign against hunger, the Cruzada contra el Hambre. The campaign, overseen by the Secretariat of Social Development or SEDESOL, sought to achieve several objectives. On a consumption level, the program sought to eradicate hunger and acute malnutrition among children. It went further into the food system by calling for a reduction in losses along the value chain, such as at storage and distribution, and also to increase food production and profits for farmers. Cruzada contra el Hambre also seeks to promote community involvement to help achieve the other four goals above. The program has succeeded in creating several temporary jobs and also in promoting community programs, particularly in rural states (Government of Mexico, n.d.). However, critics point out that true solutions rest in increasing the economic opportunities available to these communities and marginalized population, rather than social assistance. Also, many question the objectives, citing little focus on the quality of food consumed; instead the program looks solely at hunger (Torres, 2013).

[6] Though it officially started in 2002, it emerged from an earlier program, Progresa and has many similar features.

STRUCTURAL POLICIES

Oportunidades and other social policies, helps to ensure the livelihoods of many vulnerable groups in Mexico, but at the same time the country struggles with many structural issues that limit rural development or economic and social growth and integration among marginalized groups. These structural constraints are readily apparent in the food system within Mexico.

Mexico's food system is largely concentrated with large corporations, often-multinational firms, possessing large market shares and having a strong influence in the food system, dictating prices at which agriculture products are bought from smallholders and sold at markets. The result is a system that often excludes or disadvantages smallholders, reinforcing inequality along class lines and in many cases reifies spatial inequality, as large agricultural companies in Mexico are often multinational.

Research from El Barzón, a CSO network that advocates for the interest of famers across the nation, documents the high levels of concentration along the value chain with small numbers of firms controlling large amounts of the market share. For example, El Barzón projects that within Mexico six companies control 80 percent of all bean harvest and ten companies retail 70 percent of all beans. The case of maize is similar with two companies, Maseca (by Gruma) and Minsa, accounting for 90 percent of all tortilla production in the nation. Tortillas, a national staple food, are one of the main final goods derived from maize within the country (El Barzon, 2013). High levels of concentration permit agriculture operations that are larger in size and have more resources available to disproportionately benefit from the system (Oxfam, 2013a). Prices show the inequality of the system, for example in maize farmers sell their product at 0.015 USD/kilogram, tortilla companies sell the processed good at 0.93 USD/kilo showing a large variation in value capture within a system that benefits large processors and retailers over the small producers (El Barzon, 2013).

MEXICO: MOVING FORWARD

Many within Mexico recognize the problematic nature of a highly concentrated food system and are attempting to reform the system to better empower smallholders. In January 2014, the Mexican president laid out the groundwork for sweeping new reforms that sought to strengthen the agriculture sector. Known as Reforma al Campo, the initiative seeks to address five pillars of concerns: social protections, productivity of rural populations, competitiveness, sustainability and food security (Aristegui Noticias, 2014). While too early to determine the success of the program, this policy might represent a space where the concerns of small producers can be vocalized and CSO networks can help to shape policy in a way to reduce inequalities. Despite its promises, the ambiguities in policy and implementation make many skeptical of its potential impact. In comparison to other BRICSAM countries, small farmers in Mexico are often at the mercy of the market with fewer policy interventions to help them increase livelihoods.

Mexico's smallholders face inequality challenges along multiple dimensions. As mentioned above, the scale and availability of resources limits the ability of many producers to capture higher gains from agriculture. This creates an unequal system that benefits processors and retailers and limits the ability of producers to escape poverty or enhance livelihood. Policy focuses should work towards helping to ensure fair buying prices for agriculture goods. Furthermore, the isolation of many agriculture communities limits the quality of social services and the ability for social protections to effectively change living conditions. Policy needs to move beyond a focus only on the provision of services, but also on quality. Targeting female head of households for many policies is proving to be helpful but further focus on the empowering of women in agriculture is crucial to closing the gender gap.

SOUTH AFRICA

South Africa has grown at an average of 3.3% from 2003 to 2013 (World Bank 2014). The growth potential of the nation, however, is limited by the history of Apartheid and unequal access to land and other resources had long lasting ramifications that are still evident in the country. Despite a formal end to apartheid in 1994 and commitments towards more equity, the nation is still largely unequal and faces many issues in terms of food systems and security. Data varies, but many surveys indicate that over half of the country is food insecure and the black population of South Africa comprises 90% of those who are at risk for hunger. The problem is particular high in rural areas where nearly 60% of the population surveyed reported being food insecure (Labadarios et al., 2011). Attempts for land reform have been minimal in effectiveness with less 7% of land being redistributed from 1994 to 2010 despite a goal of 30% by 2015 (CSN-BRICSAM, 2013). The government has orchestrated many social and structural policy initiatives in an attempt to help increase access to food for the national population but many of these programs have had limited success. Further, reliance on social protections, while meeting the immediate needs of the South African population does not address the larger issues of food access.

Indicators of Poverty and Inequality: South Africa	
Population	52.9 million (2013)
Rural Population (% of Total Population)	37 % (2013)
% of Population Food Insecure	52%* (2005)
Gini Coefficient	65 (2011)
Income share held by top 10 %	51.7% (2009)
% of Population below National Poverty Line	50%
% of Population below $2 a day (PPP)	10.2 % (2009)
% of Rural Population below National Poverty Line	68.8 (2011)

*An additional 28 percent were at risk of hunger. A 2011 survey in Limpopo indicated similar trends persist.
Source: (HANCI, 2014; Masilela, 2013; SANI, 2013; Statistics South Africa, 2014; World Bank, 2013)

The data above show that despite many attempts at reform, South Africa still struggles with inequality. Inequality in the country is highly evident in the food system and agriculture sector, especially access to land. Agriculture accounts for 3.2 percent of the GDP and 7 percent of exports (Palmer & Ainslie, 2006), employing roughly 6 percent of the total labor force (FAOSTAT, 2014). Females account for 30 percent of agriculture workers. The main crops are maize, wheat and sugar (Ibid). Despite a strong economic sector and agriculture industry, estimates suggest that much of the population face food security vulnerabilities and that among the poorest citizens food costs account for 80 percent of their income (WWF, 2012). The country faces many challenges including external factors such as environmental issues and rising food costs, internal disruptions including high land concentration and inequality in the agriculture value chain.

SOCIAL POLICIES

The large number of people living in precarious positions and high levels of poverty and inequality means that 17 million South Africans depend on social policies to maintain livelihoods (SANI 2013). Many programs sponsored by the government, such as the Expanded Public Works Programme (EPWP) and its successor, EPWS II attempt to address issues of poverty by employment generating programs.

The EPWP, established in 2004 and replaced by the EPWP II in 2009 seeks to reduce poverty and inequality by generating employment for marginalized populations in infrastructure and community work programs, financed by the government. It emerged as an alternative to a Basic Income Grant program which would have provided financial relief for many working poor, but instead of adopting the strategy, the government took an employment generating approach (CSN-BRICSAM, 2013). Despite criticisms that the EPWP could not generate enough employment to help with the "massive" unemployment problem, the government launched a second initiative, EPWP II, to increase the number of full time public work positions to 400,000 over five years (SANI, 2013).

Programs like EPWP II face many criticisms in South Africa. Most notably, the extremely high levels of unemployment make it unlikely that public work programs will be able to generate jobs at the level needed to help people escape the poverty trap, especially in rural areas that have higher levels of poverty (CSN-BRICSAM 2013). Furthermore, the program was designed as a means to empower the working poor but employment remained short term and the number of jobs was not sufficient to make lasting impacts pushing many to call for heavier lobbying for a Basic Income Grant or National Minimum Wage (Ibid). Finally, while social policies in the country help citizens meet their basic needs, more interventions are needed to empower individuals and help them escape poverty. This will only occur through programs that seek to reduce the structural inequalities within the nation.

STRUCTURAL POLICIES

One of the major challenges facing South Africa in terms of empowering small holders and reducing inequalities is land concentration. The history of Apartheid left the nation with "extreme and exceptional" (Bernstein, 1996) levels of landless populations and often was the result of forced removal from land (du Toit & Loate, 2014). Additionally, the poorest in the nation often live outside the urban center, reducing access to services and small farmers face many obstacles to upgrading in a system composed of large, vertically integrated corporations. Attempts to address the structural issues that contribute to inequality and food insecurity in South Africa often fall short of their goals and a highly concentrated food system continues to prevail in South Africa.

In an effort to reduce concentration, the Department of Land Affairs (DLA) launched a land reform project in 1994. The goal was to redistribute 30% of land by 2015. Policies had a goal of targeting black farmers who suffered from a long history of discrimination and high rates of poverty (SANI, 2013). For example, the Proactive Land Acquisition Strategy (PLAS) program, established in 2006, sought to give formerly landless farmers small plots of land. The land, which the government owned, was rented to poor farmers under three year leases (Hall, 2014). During this time, if farmers were productive then a second, permanent, transfer from the government to farmers would occur. Despite the goals, many problems emerged and many officials state it will be several years before permanent land transfers occur. One official even said he did not foresee transfers for the next 50 years. Even when they do occur, permanent transfers will only occur for medium and large size farms, offering little opportunities for smallholders (Ibid).

Shortcomings of land distributions are further deepened by lack of financing, concentration of power among large corporations, and concentrated retailers. Land leased under PLAS remains underutilized in many cases because farmers are unable to secure loans from banks to invest in capital upgrades (Hall, 2014). Those that can invest in equipment and resources needed to remain competitive are often larger farms or those companies that are connected to multinational firms. Some analysts even believe that land units are decreasing in South Africa, suggesting consolidation into larger tracks of land held by a smaller number of actors (Authors Interviews 2014) and concentration of power as well as further marginalization of actors. Additionally, on the retail end of the value chain South Africa is also seeing concentration that limits market opportunities for smallholders. Concentration among retailers, also limits possibilities for smallholders. Four supermarket chains control 60 percent of food retail within the country (Du Toit and Loate, 2014) and as a result they are able to set many regulations and price points which constrain the autonomy of smallholders. Additionally, the geographical separation between many of these chains, which are located in urban centers, and marginalized smallholders contributes to inequalities within the nation.

SOUTH AFRICA: MOVING FORWARD

To address the high levels of poverty and inequality, South Africa adopted the National Development Plan. The initiative seeks to reduce poverty and inequality by empowering marginalized groups with skills needed to integrate into the economy. Despite some successes, many of the social policies in South Africa are unable to generate the long-term employment necessary to escape poverty traps.

The National Development Plan seeks to target inclusive growth and reduce poverty and inequality by 2030 (National Planning Commision, 2011b). Within the plan, programs target the agriculture sector seeking to redistribute land and enhance the capacity of small producer through various programs designed to enhance the skill set of participants (National Planning Commision, 2011a). Much of the job creation is sought to target disadvantaged groups such as women and black citizens (CSN-BRICSAM, 2013). Opinions on the National Development Plan vary. Some see it as a possible solution to many of the issues facing the nation, others disagree citing program implantation challenges must be settled before true reform will occur. Additionally, meaningful land redistribution from large firms controlled by white South Africans to smallholders, a majority of whom are black and have suffered from a long history of exclusion, is necessary before meaningful reductions in inequality can occur.

Moving forward it is clear that further policy programs are needed to help empower marginalized groups, raising them out of poverty and reducing inequalities. South Africa has several programs in place designed to do this but greater focus on structural constraints and implementation is necessary for these programs to be successful. The National Development Plan needs greater clarity and greater focus on many issues that extend beyond social policy.

6. ASSESSING FOOD SECURITY POLICIES FROM A COMPARATIVE PERSPECTIVE

In Brazil, India, Mexico and South Africa, food systems are undergoing rapid change, which are both generating increased inequalities in food access and also undermining the productive role of smallholders. These trends have been accelerated in all four countries by the Washington Consensus policies of the 1990's and early 2000's, including liberalization, deregulation and privatization of food production, processing and marketing. Enabled by permissive FDI rules, downstream segments of the value chain are consolidating with the penetration of large multinational and domestic companies in the processing, and retailing segments of the agri-food value chains in each of these countries. Additionally, the introduction of standards that favor large scale operations in combination with weak tenure protections not only implies that smallholders have unequal access to markets compared with commercial-scale operations, but also that continued consolidation in downstream value chain segments could threaten their access to land and resources.

However in the wake of the recent global economic crisis, the world may be entering a "post-Washington Consensus" phase, where governments, especially in large emerging countries such as those studied here, have greater autonomy to pursue aggressive social and economic policies (Gereffi, 2013). In particular, there have been important deviations from neoliberal orthodoxies in recent years, as policy-makers in each country attempted to make their food systems more equitable. In this regard, Brazil has developed the broadest suite of policies to combat inequality and promote family farming. Through policy-making efforts involving multiple government ministries and civil society organizations within the SISAN, Brazil has not only instituted a set of cash and in-kind transfer programs to address food insecurity on the consumption side, but it has also innovatively used these programs to also support the economic positioning of family farmers through targeted procurement mechanisms. Through the Ministry of Agrarian Development, Brazil has acknowledged that smallholders face different challenges than large commercial farmers and begun developing institutions which support small-scale farming as a sustainable economic option. The crucial role played by CONSEA, the forum within SISAN through which CSOs participate in policy deliberations, in crafting agricultural and social policies to the benefit of the rural poor cannot be overemphasized. Still, Brazil remains one of the most unequal countries in the world, and both gender and urban-rural inequalities remain stark, particularly in the Northeast region of the country; there remains much to do.

India, Mexico and South Africa have also developed social programs in order to support food consumption among the poor and otherwise combat the symptoms of income inequality. However none of these countries has incorporated strong modalities which acknowledge and support smallholders' roles as producers within the food system. India's reforms to the PDS represent an important step forward with respect to expanding entitlements to food for the poor, however the country lacks substantial government policies targeted at small farmers. Mexico has experiences some success with programs such as Oportunidades, but these policies are criticized for recreating systems of gender inequality they seek to reduce. In South Africa, attempts to boost smallholder productivity are limited by issues of implementation and legacies of disenfranchisement that still affect the nation.

Finally, policies in all four countries lack mechanisms to address the negative implications of consolidation and shifting governance-dynamics for agriculture and especially the smallholder sector. The intensity of oligopsonistic and monopsonistic market power that buyers in these industries have with respect to agricultural producers creates enormous challenges with respect to market access for smallholders, undermining the economic sustainability of small-scale agricultural models. These systemic threats to small-scale farming pose a serious threat to family farmers, which even dualized approaches to agricultural policy such as Brazil's Ministry of Agrarian Development cannot allay, as these are problems which are driven by downstream processes which extend beyond agricultural activities per se. Addressing consolidation and market concentration among as well as the pressures that these place on national food systems requires stronger policy responses at both the national and global levels. At the national level, policy makers must recognize that the current structure of food systems around highly consolidated value chains creates unique pressures for small farmers that require innovative policy solutions that go beyond the agricultural policies of today which emphasize large-scale, highly capitalized agriculture. Such policies should promote market access for small-scale and local farmers through a combination of capacity building and the creation of incentives for preferential sourcing arrangements among private and public buyers. National competition policies should also be better implemented, in order to place reasonable limits on the market power currently enjoyed by monopolies and oligopolies along the food chain. Crafting effective policies in this area will require a great deal more empirical knowledge around exactly how agri-food chains are governed across key commodities in each country and how these generate challenges for small-scale and sustainable farming models. Civil society can play a crucial role in producing and disseminating knowledge of these trends to policy makers and the public at large.

However both inequalities within the food system and challenges to small-scale farming models are also strongly impacted by global processes. Many of the companies which enjoy the privileges of market concentration are either multinational corporations or large, financialized domestic companies which have tapped into global capital markets to fund growth in their market share. In addition, the hand-off approach that has dominated agricultural policy reform for the last thirty years is itself institutionalized through international mechanisms, such as the WTO Agreement on Agriculture. In recent years, there has been an upsurge in the use of "deep preferential trade agreements," which not only reduce tariff barriers but also include rules regulating other areas such as investment, industry standards, competition policy, intellectual property, as well as labor and environmental regulations (Bruhn, 2014). While the inclusion of such "behind the border" provisions in trade agreements may open up international markets for capable domestic farmers, they effectively tie the hands of governments wishing to pursue national development strategies. Future negotiations around preferential trade agreements must allow for greater flexibility for developing countries. Through a better understanding of how GVCs have re-organized global and national food systems, CSOs and policy-makers can build stronger capacities to identify how – and if – to engage in specific trade negotiations.

In order to systematically evaluate the food security policies of these countries, we have compared their performance along four broad categories, each of which is evaluated according to multiple dimensions (see Table 2). With respect to the first two categories, we consider the extent to which policies improve the terms of upstream and downstream linkages facing smallholders in agri-food value chains. That is, are there policies in place to ensure that smallholders can more easily gain access to the purchasing channels of public and private buyers? And to what extent do policies provide resources to the smallholder farming sector through credit, technical assistance and infrastructure investments? Next, we compare social policy efforts, which have become important tools in all four countries for expanding the consumption possibilities of those at risk of food insecurity in both urban and rural settings. Finally, we look at how well institutionalized food security and pro-smallholder policy-making is in each country. As the Brazilian case in particular demonstrates, a well-organized policy-making process which involves CSOs, cuts across multiple levels of government and formally recognizes the value of smallholders and traditionally underrepresented groups is crucial to ensuring that policies actually respond to the needs of citizens. A well-institutionalized policy environment is important for policy-makers and civil society actors to be able to monitor and evaluate progress and to adjust priorities over time as they learn what works well and what needs improvement.

TABLE 2: **POLICY ENVIRONMENT ACROSS FOUR BRICSAM COUNTRIES**

		Brazil	India	Mexico	South Africa
Creating markets for smallholders	Public sourcing programs	●	◐	○	○
	Local sourcing requirements for private buyers	○	◐	○	◐
	Programs to enable compliance with quality standards	◐	◐	◐	○
Enabling provisions for smallholders	Provision of credit, insurance, inputs	◐	◐	●	◐
	Technical assistance and training	◐	◐	●	◐
	Invesments in infrastructure	◐	◐	◐	●
	Land Tenure and Land Reform	◐	○	◐	◐
Social protection	Cash transfers	●	○	●	◐
	In-kind transfers	◐	●	●	◐
	Income generation	◐	◐	○	◐
Institutional infrastruc-ture for food security	Decentralized approach	●	◐	◐	◐
	Prioritization of family farming	●	○	◐	◐
	Supporting traditionally disen-franchised groups	●	○	◐	◐

Source: Authors' analysis

Table 2 provides an indication of where the four countries are strong and weak in each of these broad policy areas. A full circle indicates that a policy is present and is effectively implemented. A half circle indicates that a policy is present, but it lacks an implementation framework or is poorly targeted. An empty circle indicates that the issue appears to be largely ignored by policy-makers.

The table above helps to explain many impediments to overcoming rural poverty and inequality. While each country seeks to assist smallholders in various manners, these approaches are most often in the form of temporary social assistance or programs that do not provide long term economic stability. Land tenure protections and land redistribution in all four countries remain poorly implemented at best and in some cases vaguely defined. Technical training and assistance is also often lacking, and securing credit is difficult. On the other hand, the current government approaches in the areas of agricultural R&D and international trade negotiations create economic advantages for large landholdings and large agribusiness interests while offering very few benefits to small farmers. The combined effect of this policy style, which is more or less present across the four countries examined here, is to further the distance between those living in the second and third rural worlds and the landowners who are part of formal markets and occupy the first rural world.

Increasing female participation is often acknowledged as crucial but is normally integrated into assistance programs that give them greater access to income or staple foods as well as education program for girls. While these are important efforts, they are not necessarily enough to address the realities of rural gender inequalities. Here, further pushes towards landownership and greater economic and political autonomy in rural communities is also needed to reduce inequality. Indeed, while many of these social assistance programs more or less effectively serve those in urban centers, expansion into rural setting is often hindered by poor infrastructure, geographic remoteness and limited state capacity. The example of Brazil demonstrates that it is possible, through the joint efforts of the state and civil society, to craft policies that are adapted to the realities and underlying causes of rural poverty, particularly as it affects women.

The globalization of agri-food systems has created opportunities for a few – often landowners or those with access to capital – but has simultaneously increased gender, spatial and economic inequality, particularly in terms of increased marginalization of smallholders. At the same time, it has brought policy discussion beyond the nation state to global arenas such as the WTO and multilateral trade negotiations. In order to create a system that empowers the largest number of smallholders, civil society needs to play an active role in policy discussions at all levels: local, national, regional and global, as this is likely to be the only channel for smallholders to have any chance of making their voice and their perspectives heard. Civil society actors should also continue the dialogue with colleagues across the globe regarding best practices and other lessons that are relevant to common challenges, such as the rise of large retailers and the consolidation of land. Through collaboration and information-sharing, civil society networks can advocate for policies at the national and global levels that address the unique contemporary challenges posed by consolidated and globalized food value chains and the barriers that these pose for political efforts to craft a fairer and more inclusive food system. History shows that neither pro-market nor pro-state policies alone can effectively ensure equitable access to safe and nutritious food, however the balance of power is currently tipped too far in the direction of private control of the food system. There is an important role for CSOs to play in both crafting and advocating for pragmatic and innovative public policies that can deliver on the promise of an equitable and inclusive food system for all.

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