



The
Food and Land Use
Coalition

IMPACT REPORT

2021 - 2024

About FOLU

Established in 2017, the Food and Land Use Coalition (FOLU) is a global community of changemakers, innovators and experts working to advance sustainability, equity and resilience in food and land use systems. United by a shared vision of rapid and transformative change, this network of now seven country platforms nine international partners, and over 50 Ambassadors, strives for a world in which food and land use systems enable people and nature to prosper.

Guided by evidence and science-based solutions, FOLU works with farmers, policymakers, businesses, investors, and civil society to unlock collective action at scale. To deliver positive outcomes for the environment, improve health, prompt inclusive development and tackle food insecurity, the Coalition advocates for a reformed global agenda, centered around ten critical transitions. Together, these transitions enable these systems to provide food security and healthy diets for a growing global population, while also tackling climate, biodiversity, health, and poverty challenges – and could unlock \$4.5 trillion a year in new business opportunities.

International Partners:



Country Platforms:



Brazil



China



Colombia



Ethiopia



India



Indonesia



Kenya



We need to urgently change how we produce, process, and consume food today. There is a historic opportunity to transform agri-food systems, which are essential to achieving the Sustainable Development Goals.

Dr. Qu Dongyu,
Director-General, FAO



About this report

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ABOUT

What is this report?

This report provides a snapshot of FOLU's impact over the past three and a half years, told through nine impact stories. Each story has been selected to bring to life how the Coalition catalyzes change across the different contexts we operate in. We also offer some reflections on what our experiences to date mean for FOLU's third phase of work from 2025-2027.

Who it is for?

This report offers FOLU's partners, including our donors and those we work with on food systems transformation, a sense of the impact being driven by their support. We hope the report is also useful for those seeking to understand how food system transformation happens in practice.

How to read it

This report is not intended as an exhaustive account of FOLU's work. Our [website](#) provides a wealth of resources, blogs, and media pieces for those seeking more detail on individual activities and analysis.

A note on data & photography

In this report we look back at our progress between 2021 and early 2024. All data is from this period, unless otherwise stated. Some of the photography featured showcases sustainable food, forestry and farming practices captured through FOLU & Panos Pictures' project.

FOLU by numbers

SUPPORTING POLICYMAKERS

18

Tools developed to enhance capacity of national decision makers

MOBILIZING RESOURCES

300m PESOS

invested by Colombia's national bank into new regeneration fund

IMPACTING PEOPLE

500+

Practitioners using Colombia's **Regeneration Platform**

REGENERATING LAND

3.1 MHA

under **sustainable agricultural practices** in Ethiopia

ENGAGING BUSINESS

17

companies piloting **Science-Based Targets** for nature

BUILDING AWARENESS

170+

FOLU knowledge products published

25

National Action Coalitions established

\$15m

mobilized for FOLU with 50% to scale in-country action

3.5m

farmers **partnering with multinationals** via WBCSD initiative

7.3 KHA

transitioned to **regenerative cattle ranching** in Colombia

25+

companies advocated for **positive policies** ahead of COP28

400+

workshops delivered around the world

20

Ministries advised globally on food systems transformation

\$300m

in **philanthropic investments** identified as key to reducing food loss and waste

5.7bn

lives improved if **Emirates Declaration** is fully implemented

160 MHA

committed to transition to **regenerative agriculture** by leading multinationals

23

companies joined **Center for Agri-Food Sector Sustainability & Climate Action** in China

125%

increase in "**food systems**" media mentions from COP27 to COP28

70+

farmer voices elevated at COP28

Not all impact is easily quantified. FOLU often seeks to "lead from behind", catalyzing and enabling others to act rather than delivering services directly to farmers or consumers. We trade in influence and ideas more than hectares and dollars. But numbers can tell a story in a way that words do not.

Our approach to impact

Ten critical transitions. FOLU advocates for a global reform agenda centered around ten critical transitions. Together these transitions enable food and land use systems to provide healthy diets and improved livelihoods for a growing population without exceeding our planet's boundaries. Our work is geared towards accelerating these transitions globally and in the seven countries where we have a presence.

Tipping points. Our ultimate benchmark for success is measured on the ground. Are fewer people going to bed hungry? Has deforestation slowed? Are farmer livelihoods improving? Changes at this level can take years to materialize, but they are also non-linear. At FOLU we focus on unlocking positive tipping points – those conditions that, when achieved, create their own reinforcing momentum that shifts behavior *en masse*. By focusing on these tipping points, we can concentrate our own efforts, and those of our partners, where the potential for impact is greatest.

Changing behavior. Creating the conditions for systems transformation requires five sets of behavior change – (1) better governance that accounts for the hidden costs and benefits across the system (2) better business models that innovate new approaches and technologies for production, processing and distribution (3) better choices by consumers that increase demand for sustainable, healthy food (4) better investments that correctly price risk and recognize opportunities, and (5) better farms and communities that adopt more sustainable, productive and equitable farming practices. We do not need to move everyone everywhere all at once; instead, we focus on those with the most agency whose decisions impact the behavior of others. Create enough pioneers and proof points and you shift momentum for change.

Unlocking bottlenecks. FOLU catalyzes behavior change by addressing bottlenecks that stand in its way. There is no one-size-fits-all approach that can be copy pasted into new contexts. As the nine impact stories in this report demonstrate, the socio-political context determines what is possible and the best route to impact. Across our portfolio we work to build trust and a shared vision for change, synthesize evidence to help inform decision making, build the technical capacity of organizations to implement new approaches, organize pilots to validate new technologies or processes, and spread the message through clear and engaging communications.

Strategic communications. FOLU is in the business of influence. To spark the change we envision, we must translate ideas into accessible and impactful information and ensure this reaches our target audiences. As such, our communications efforts have grown significantly. FOLU has dedicated communications staff in Colombia, Ethiopia, India, and Indonesia. Recognizing that communication varies across different contexts, we prioritize context-specific, diverse, and inclusive strategies to drive change. We secure coverage in globally recognized outlets like The New York Times and the Financial Times, as well as top national publications in FOLU countries. By engaging nearly 20,000 followers on social media daily and crafting unified messaging for key global events, we amplify our impact.



Revolutionizing the food system can lead to a better future by decoupling environmental impact from food production.

Børge Brende,
President of the World
Economic Forum



Impact stories

In this section we present nine impact stories. Each one unpacks a change that the Coalition has helped to bring about. These stories showcase the behind the scenes work that goes into shaping a new policy framework, a more ambitious commitment, or the start of a new social movement. The stories have been selected from across the Coalition to demonstrate the breadth of contexts in which we operate and the variety of approaches used. This list is not intended to represent FOLU's complete portfolio.

- 1 **Mainstreaming food systems thinking**
- 2 **Scaling regenerative agriculture in Ethiopia**
- 3 **Building movements for change in Colombia**
- 4 **Adopting an eco-regional approach in Indonesia**
- 5 **Shifting agricultural policy in India**
- 6 **Financing nature-based solutions**
- 7 **Mobilizing business action on climate**
- 8 **Catalyzing Brazilian leadership on food**
- 9 **Linking global ambition with local action**





[FSEC's] research proves that a different reality is possible. This opportunity should capture the attention of any policymaker who wants to secure a healthier future for the planet and for people.

Christiana Figueres,
Founder of Global Optimism



Impact Story 1: Mainstreaming food systems thinking

What is the problem we are trying to solve?

The multitude of interconnections within the food system means that interventions with an effect on one part of the system can create unintended outcomes elsewhere. A 'systems approach' is crucial to managing such trade-offs and unlocking innovative solutions. FOLU brings a systems lens to food and land use issues.

What did we do?

Combining the expertise of partners spanning different disciplines, stakeholders, and sector verticals, FOLU's 2019 [Growing Better report](#) became the first truly integrated reform agenda for the global food and land use system. By modelling the benefits and investments associated with transitioning to a better system, the report laid out the business case for more ambitious government, private sector, and civil society action. Since 2019, FOLU has mainstreamed food systems thinking in three ways:

First, by refining the theory. In collaboration with the University of Exeter, FOLU developed a framework for leveraging '[positive tipping points](#)' in the food system, helping policymakers and practitioners to pinpoint the most effective areas for intervention. The [FELD Action Tracker](#) and the Food System Economics Commission (FSEC), co-convened by FOLU, also built on the insights of Growing Better at a more granular level.

Second, by encouraging more integrated policy platforms. The FABLE Consortium supported governments to create more integrated food and land use transition pathways through collaborative policymaking.

Finally, by advocating for private sector leadership. FOLU shaped the development of 'science-based targets for nature' and supports the piloting process, which sees seventeen companies working to set land and freshwater targets. The [Future Fit series](#) takes a systems lens on corporate climate and nature action, articulating the risks of inaction and identifying which actions are economic today.

What was our impact?

FOLU's Growing Better report and subsequent UN Food Systems Summit have both inspired others to build on the food systems approach we championed. Food systems now feature at the centre of many organizational strategies, including FAO's flagship [State of Food and Agriculture reports](#), and its Roadmap for [Achieving SDG 2 without breaching the 1.5 °C threshold](#). The FELD Action Tracker provided a systematic reality check of Nationally Determined Contributions and the extent their commitments were backed up practical policies and action; and FSEC's [Global Policy Report](#) has galvanized conversations in several countries. Food systems transformation is also attracting more resource. Today, [AGRA](#), [GAIN](#), [WEF](#), [The World Bank](#), [Bezos Earth Fund](#), [Lombard Odier](#), [Rockefeller](#), and others have developed strategies around food systems – these didn't exist in 2020. At COP28, it was announced that more than \$2.5 billion has been mobilized by the global community to support the food-climate agenda. Finally, more governments are adopting integrated policy approaches. For example, the Indonesian Government is setting up a National Multi-stakeholder Platform for Sustainable Food Systems, which brings together agriculture, food security, health, and environmental policy under a single coordinating body with FOLU acting as secretariat.

Why does it matter?

Siloed thinking has been shown to fail. Only by considering the complex interactions in food and land use systems and working collaboratively to create solutions can we overcome the economic, political, and technical hurdles to transformation.

What comes next?

The need for action is clear but implementation at scale will require radical new forms of collaboration and dedicated financing. In Phase 3 (2025-2027), FOLU will catalyze processes at landscape level, across key value-chains, and through integrated multistakeholder policy platforms to craft systems-based solutions to pressing food and land use issues.



We need all the world's stories, ideas and solutions to transform food systems for the better and to feed the world without starving the planet.

Dr Agnes Kalibata,
President, AGRA



Impact Story 2: Scaling regenerative agriculture in Ethiopia

What is the problem we are trying to solve?

To ensure food security and contribute to economic growth, the Ethiopian Government has set ambitious agricultural targets. These can only be met if the country's 16.7 million agricultural households can raise their productivity levels. Over the past decade, new varieties, increased fertilizer supply, expansion of irrigation, and better market linkages have raised national cereal yields considerably and put many farmers on a path from subsistence to commercial farming. To ensure that these early wins are not undermined in the future, agricultural productivity must keep pace with demographic growth and avoid pitfalls such as growing pest and disease resistance, irreversible soil degradation, greater climate shock vulnerability, and further ecosystem transformation in agricultural landscapes.

What did we do?

FOLU is working with the Ethiopian Ministry of Agriculture (MoA), Agricultural Transformation Institute (ATI), Ethiopian Institute of Agricultural Research, Sasakawa Africa Association (SAA), and Farm Radio International to advance more regenerative, nutrition sensitive, and inclusive agricultural practices within the Government's Agricultural Commercialization Clusters initiative (ACC). Our approach emphasizes government ownership and robust evidence from agricultural experts and farmers. We have produced in-depth studies and synthesized evidence of successful regenerative agricultural practices in Ethiopia, and organized learning tours for senior agricultural decision-makers.

National and regional workshops have been conducted to validate the Government's sustainable and regenerative agriculture framework. This framework applies regenerative concepts to the Ethiopian context – clearly setting out the challenges and benefits, particularly for Ethiopian farmers. To complement this, a national action coalition facilitates institutional support, and farmers' perspectives are being gathered to ensure effective implementation.

What was our impact?

Key stakeholders have recognized the evidence that agricultural commercialization and regenerative agriculture can be pursued simultaneously. MoA now envisages itself playing a leading role in future coordination of government actions. SAA is committed to leading further direct implementation with farmers, and many organizations have shown a strong desire to collaborate with FOLU.

Why does it matter?

This combination of shifts has the potential to significantly increase household incomes, reduce poverty and strengthen local value chains. [IUCN](#) estimates that regenerative practices in Africa could add more than \$15bn in gross value added per year by 2030, creating an additional one million full-time jobs. Across Africa regenerative practices are shown to have positive impacts on yields, whilst improving degraded land, lowering fertilizer costs, and reducing vulnerability to climate change by boosting system resiliency. Once evidenced in Ethiopia, this could transform the lives of millions of people and help the country achieve food and nutrition security in a sustainable manner.

What comes next?

To clearly demonstrate the potential of regenerative agriculture at scale in Ethiopia, FOLU and its partners will trial the framework's regenerative agricultural approaches with 20 clusters of experimental farms across multiple growing seasons. The framework was designed to be easily applied to the 300 districts of the ACC program. This vast nationwide extension effort directly engages over 1.7 million farmers and exposes another two million farmers to agricultural innovations. The goal is to adjust the advice dispensed by the program so that regenerative practices are scaled across the country, ultimately reaching all neighbouring districts.



FOLU Ethiopia has placed itself at the center of the debate on directional choices for Ethiopia's national food systems.

Norwegian Embassy



Impact Story 3: Building movements for change in Colombia

What is the problem we are trying to solve?

There is little consensus on what we collectively want from our food and land use systems. Without a shared vision, it is hard to identify how to get there. One of the roles FOLU plays is to forge much needed consensus between stakeholders. This requires navigating different perspectives, levels of knowledge and understanding, dynamics of power and contrasting incentives and values. We believe the key to finding consensus is trust. By building trust between groups, we can unlock a shared understanding of food system challenges and create a clear path forward. Through this process, we build powerful movements for change.

What did we do?

In Colombia, we curated a series of dialogue and co-creation processes that bring together government, civil society, the private sector, academia, and community groups to forge trust and build a shared vision for the future. Each dialogue focused on a particular region (department) and produced a diagnosis of the regional food system today and a roadmap describing a shared 10-year vision. The co-creation process is thorough and iterative as each diagnosis and roadmap takes place over a year. The methodology includes a range of techniques – including system diagnostics, visioning and substantive discussions and commitment-making for implementation.

FOLU facilitates the discussion among regional partners and ensures strong ownership and commitment to implement the transformation embedded in the roadmaps. These roadmaps are designed to support regional development plans, helping to shape government policy relevant to the food systems. The grassroots engagement that underpins each roadmap creates a powerful network of change makers and a united voice that supports regional and national food systems pathways.

What was our impact?

FOLU Colombia has supported the creation of three regional roadmaps for food system transformation in the major food producing departments of Quindio, Antioquia and Valle del Cauca. The roadmaps have involved over 600 participants drawn from across the food system. In each case, they have bolstered regional governmental development plans and influenced private sector actions. For example, in Antioquia, the regional government is designing strategies to use the tax collected from vehicles on initiatives to alleviate hunger in the department, drawing on ideas from the FOLU Antioquia roadmap. In Valle del Cauca, a new agroecology policy has been driven and informed by the roadmap and its mentor group.

The work with the private sector in the region has resulted in Fundación Nutresa (a major food company in Colombia) and Fundación Bancolombia (the largest national bank) supporting regenerative networks of activity, which will impact food systems transformation and local economies. In each region actors have taken ownership of implementation within their own agendas in a collaborative manner.

Why does it matter?

The regional roadmaps showcase the potential of dialogue to unlock food system consensus and drive forward meaningful action by the public and private sectors. Many of the approaches deployed are replicable – both inside and outside Colombia.

What comes next?

Other departments in Colombia have registered their interest in developing their own regional roadmaps. In Phase 3 (2025-2027), FOLU Colombia plans to support a number of new regions, each time fostering strong ownership among the regional stakeholders, enabling faster scale up and impact.



We want to thank FOLU Colombia for working together hand in hand towards a territory that is forging a sustainable economy of food and land use.

Julio Oesar Cortes Pulido,
Secretary of Agriculture,
Department of Quindío



Impact Story 4: Adopting an eco-regional approach in Indonesia

What is the problem we are trying to solve?

Indonesia's food system faces several major challenges today. The population is experiencing the triple burden of malnutrition – obesity, stunting, and micro-nutrient deficiencies – with those in rural areas disproportionately affected by the latter two. Agriculture and land use emissions eclipse Indonesia's energy-related emissions in most years. This stems principally from forest clearance and peatland fires associated with food production, methane from rice, and improper use of agrichemicals, all compounded by high levels of food loss and waste.

At the heart of these issues is Indonesia's over-reliance on a single staple food, rice – in spite of the country's abundance of local food resources. An eco-regional approach to food systems – one which looks at localizing the production, processing, and consumption of food – offers a route out of these challenges. Eco-regionalized approaches incentivize sustainable, healthy, just, diverse, resilient production and consumption based on local resources and wisdom.

What did we do?

Working through our Coalition partners, FOLU Indonesia – locally known as Koalisi Sistem Pangan Lestari (KSPL) – has made significant progress in integrating eco-regional approaches into national government strategies. First, we developed dynamic systems modelling to establish the evidence base for food regionalization pathways for the six major islands in Indonesia. Second, working with Indonesia's Ministry of National Development Planning (Bappenas), we advocated for the formation of a national multi-stakeholder platform for integrated, collaborative dialogue on food systems transformation. Third, FOLU Indonesia has built sub-national political support in three key landscapes for an eco-regional food systems approach.

What was our impact?

The 'eco-regionalization concept' has been integrated into the Government's long-term national development plan 2025-2045, with the National Multi-stakeholder Platform for Sustainable Food System playing a potentially impactful role in implementation.

Why does it matter?

Adopting an eco-regional approach that promotes local food resources and local wisdom has the potential to enhance food security while addressing nutritional problems, closing social equity gaps, and reducing the food system's climate impact. FOLU has built support for the approach across political and social groups. To do this we have highlighted the potential contribution of eco-regionalization to improved dietary patterns, livelihoods for farmers and those working in the food system, food accessibility, food affordability and reduced environmental impact.

What comes next?

FOLU Indonesia has been invited to act as secretariat to the National Food System Platform, which is expected to be formalized under Bappenas' Ministerial Decree in 2024. In this role, through a multi-stakeholder platform which will involve multiple ministries, regional offices, the private sector, universities, and local CSOs, FOLU will encourage the creation of subnational action plans in pilot regions and advocate for the enabling policies and incentives to embed eco-regional approaches more broadly. Furthermore, we aim to bridge the connection between agricultural policy and the provision of food that is simultaneously accessible and nutritious.



FOLU Indonesia has provided unwavering support in the past six years. We value FOLU's partnership with us, and looking ahead, we are eager to continue collaborating.

Jarot Indarto,
Director of Food and Agriculture,
BAPPENAS



Impact Story 5: Shifting agricultural policy in India

What is the problem we are trying to solve?

India's agricultural sector faces multiple overlapping challenges. Overuse of agricultural chemicals, and water shortages have caused severe land degradation. When coupled with increasing weather stress this has led to declining agricultural yields. Inadequate income generation from agriculture and high debt levels have led to extensive recourse to "food for work" government programmes and large-scale seasonal migration to urban areas in search of work. India's agricultural system is still geared to prioritize cereal production to feed a public distribution system and is yet to progress to address the country's nutritional crises, malnutrition, micro-nutrient deficiency, and rising obesity. Regenerative and sustainable approaches to agriculture offer a long-term solution to all these challenges but a lack of knowledge or demand from farmers and policymakers means that action on this is sparse.

What did we do?

Under India's federal system, responsibility for agricultural development sits with state governments. However, agricultural policy decisions are taken by the union government and implemented by the state government. FOLU closely supports the state government of Madhya Pradesh in better understanding the potential benefits of a sustainable and regenerative approach to its agricultural sector.

In collaboration with the Department of Farmer Welfare and Agriculture Development (FWAD), we helped the state government prepare an action plan with critical knowledge integrated at the district level. We convened key stakeholders in four state districts and secured an agreement to pilot regenerative approaches on the ground. Furthermore, we connected stakeholders with the rich knowledge held within India's civil society community. We believe access to these resources will be key to the broader transition to sustainable and regenerative agriculture.

What was our impact?

FOLU's efforts are leading to the roll out of regenerative and sustainable agricultural practices in four districts in Madhya Pradesh. Importantly, from a political perspective, this shift is framed in terms of improving farmers' income. Crucially, the protection of environmental and social outcomes does not involve compromising on productivity. Madhya Pradesh is becoming a national case study for how other states can lead on large-scale regenerative agriculture transitions steered by local agriculture departments.

Why does it matter?

FOLU's work with the Government of Madhya Pradesh acknowledges the leading role of the state Farmer's Welfare and Agriculture Department. This way of working has the potential to trigger a faster and wider transformation of the food system. It provides a compelling alternative to the current mix of piecemeal efforts to convert existing agricultural practices. If successful, the uptake of regenerative and sustainable approaches will boost food security and secure crop yields. This in turn will shore up support for the broader food transition.

What comes next?

FOLU India's agenda is aligned with India's commitment to achieving the Sustainable Development Goals (SDGs). The convergence of political will, economic imperatives, and alignment with national goals makes this the optimal moment for FOLU India to play a pivotal role in driving sustainable transformations in the Indian food and land use sector.



The Madhya Pradesh Government wholeheartedly welcomes the Sustainable Agriculture Programme as it is in our hour of need. We will work together with WRI and FOLU India for successful implementation.

Kamal Patel,
Minister of Agriculture, Government
of Madhya Pradesh



Impact Story 6: Financing nature-based solutions

What is the problem we are trying to solve?

Nature-based Solutions (NbS) such as shifting to regenerative agriculture, restoring degraded land, and protecting existing carbon sinks could provide 30% of the mitigation needed to limit global warming to 1.5°C. In addition, NbS could provide major co-benefits to biodiversity, food security, resilience, livelihoods, and health outcomes. But unlocking this potential requires action from communities and countries with limited access to the necessary finances. In 2023, FOLU set out to understand how these critical NbS could be financed in particular country contexts.

What did we do?

FOLU developed a model to cost the adoption of NbS at country level and identify potential sources of investment. It was first applied in [Kenya](#) and [Colombia](#), with a similar assessment then replicated in India. The models were built by compiling data on the costs of existing NbS projects from across FOLU's networks and from academic literature. Project-level data was used to model costs of NbS adoption at scale. The model was customized based on detailed engagement with national government and financial institutions, enabling the team to build a contextualized picture of the NbS potential for each country. The team also mapped which types of financial institutions might be able to invest in NbS depending on their risk and return profiles. FOLU's insights demonstrate that governments can lower the investment burden on the public sector in the long term by creating the enabling environment and fostering blended finance vehicles including private sector investment.

What was our impact?

Disseminating the Kenya report culminated in a workshop in April 2023 where key stakeholders including donors, private sector, and government officials were asked to

come up with an action plan as a result for the report. The Colombia team hosted a webinar with leading investors in the food systems landscape in August 2023, prompting engagement with the National Planning Department and the National Association of Industries to implement deforestation-related nature-based solutions. This eventually led to Fundación Bancolombia and Fundación Nutresa establishing the first fund supporting networks of regeneration (see story 3).

In India, a group of 21 experts (including five government officials) from different institutions came together to create a Technical Steering Committee to intensify investments for NbS. Findings revealed that just six NbS could achieve over 80% of the total NbS mitigation potential in India, achieving an estimated cumulative 16GtCO₂e of mitigation by 2050. These findings have been presented by FOLU India to the Prime Minister's office.

Why does it matter?

Our analysis has generated essential insights on building financial structures to finance NbS in different landscapes. In most contexts, a combination of forest, land and agriculture sector finance, catalyzed by an injection or reallocation of public funding could trigger significant investment. Next, we want to learn about how to set up effective blended-finance institutions to secure funding for NbS, starting in India.

What comes next?

In Colombia, India, and Kenya, teams are continuing to engage both government and financial institutions to advocate for more effective and larger scale financing for NbS. This engagement is paired with piloting and addressing knowledge gaps on priority solutions. The ambition is to inform these governments' long-term investment and policy strategies for NbS and mobilize a wider range of investors to engage in this crucial asset class.



Nature-based Solutions receive less than 3.5% of global climate finance, despite holding the potential to deliver 30% of the mitigation needed to achieve the 1.5°C target.

From Climate Policy Initiative's report *Global Landscape of Climate Finance* (2023)



Impact Story 7: Mobilizing business action on climate

What is the problem we are trying to solve?

Food and agriculture companies have a crucial role to play in reducing emissions in the food and land use sector, given that three quarters of the sector's emissions sit within their value chains. These companies face a choice: shift towards more sustainable practices today and see lower costs, stronger returns, and greater agility in the face of new regulations. Or choose not to change and face additional, and more disruptive costs tomorrow while also renegeing on climate and nature commitments.

What did we do?

FOLU has mobilized business as a positive voice shaping policy ambition. In 2020, FOLU led a [call to action for world leaders](#) to address COVID-induced disruptions, signed by 70 business and civil society leaders. In 2021, we mobilized 220 senior executives through the [Food Systems Summit Business Declaration](#) to raise ambition in transforming food systems – the world's first in focused business engagement on food systems.

In 2023, in collaboration with We Mean Business and WBCSD, FOLU developed the [Future Fit Food and Agriculture report series](#). The first report helped demystify the growing number of voluntary business standards, whilst the second put a cost to achieving net zero for business in the AFOLU sector, starting a conversation around who within these value chains should pay for the cost of the transition. The reports culminated in high-impact events with business leaders during 2023 NY Climate week, Davos, and Forum for the Future of Agriculture.

Finally FOLU partners have piloted innovative value chain collaborations on the ground. For example the [COP28 Action Agenda on Regenerative Landscapes](#), co-led by WBCSD, the COP28 Presidency, BCG, and the UN High Level Climate Champions, mobilized 25 leading food and agriculture organizations, partnering with 3.6 million farmers, to accelerate efforts to transition to regenerative landscapes by 2030.

What was our impact?

The Future Fit series has gained significant traction with leading companies who have noted how the policy messages shaped their advocacy approaches at COP28. More broadly the number of commitments to improved production and sourcing by food and agriculture companies has markedly increased since the UN Food Systems Summit. The Action Agenda on Regenerative Landscapes alone is supporting food and agriculture organizations to transition over 160 million hectares, with an initial investment of \$2.2 billion.

Why does it matter?

Analysis for the Future Fit reports series estimates that, to mitigate up to 90% of their emissions by 2030, food and agriculture companies should expect sector-wide costs of approximately \$205 billion a year. Committing that level of finance will require bold action from both businesses and policymakers. Civil society can help make them bolder.

What comes next?

Our work highlights that in order to drive systemic changes in business practices (1) all stakeholders have a role to play, and (2) context-specific approaches are needed, as solutions look very different depending on which agricultural products and geographies are in focus. FOLU will therefore focus on exploring tailored multistakeholder solutions to specific value-chain challenges.



To meet net-zero targets, businesses must take concerted and ambitious action to de-risk the transition for producers and ensure the costs and benefits of mitigation are shared equitably across the value chain.

Diane Holdorf,
Executive Vice President, WBCSD



Impact Story 8: Catalyzing Brazilian leadership on food

What is the problem we are trying to solve?

Brazil is an agricultural powerhouse, producing a third of the world's soy, 14% of its beef, and 10% of its chicken. But the growth of Brazil's food system has left a significant impact on the environment. In 40 years the Amazon and Cerrado biomes have lost over 72 million hectares of forest – equivalent to Sweden and Norway's land mass combined. Agriculture, forestry, and other land use change account for more than 70% of Brazil's total greenhouse gas emissions.

Brazil's export-driven commodity markets are juxtaposed against a national context of chronic food insecurity. Approximately 15% of Brazilians do not have enough to eat, including many of those who work in agriculture. [FSEC's Global Policy Report](#) estimates the Brazilian food system generates hidden health and environmental costs of \$500bn annually, equivalent to 16% of GDP. The election of President Lula de Silva in 2023 on a platform of tackling deforestation and addressing poverty has created an opportunity for Brazil to re-establish its global leadership on food systems transformation.

What did we do?

Established in 2023, FOLU Brazil is helping to deliver the Government's ambition on food systems reform. At COP28, we created opportunities for the Ministry of Agrarian Development and Family Farming to showcase their work on the global stage in a series of high-profile events. This included a joint event with the United Arab Emirates on the food-nature nexus. FOLU Brazil was instrumental in making the case for Brazil's membership of the Alliance of Champions for Food Systems Transformation ([ACF](#)) and securing their role as co-chair.

By understanding the priorities and constraints of the Brazilian Government, we have helped connect the global food systems agenda in a politically salient way. For example, FOLU worked in partnership with the federal government to deliver the "[Amazon](#)

[Dialogues](#)", which brought together initiatives aimed at shaping a new strategy for the region with Brazilian decision-makers. At the Brazilian Climate Finance Forum, FOLU unpacked the implications of FSEC's analysis of the hidden costs of Brazil's food system for the finance community.

What was our impact?

Brazil signaled its commitment to transforming its food system when it signed up to the Emirates Declaration (see story 9). As co-chair of the ACF, Brazil now has an opportunity to work as part of a high-ambition coalition to set the pace of global progress.

Why does it matter?

A more diverse, sustainable, and resilient food system presents an opportunity for Brazil to (1) reverse the decade-long decline in real wages, (2) remove the country from the UN Hunger Map and (3) create the economic incentives to protect Brazil's uniquely valuable forest and savanna ecosystems. Brazil's commitment to integrate food systems reform within its climate and biodiversity plans makes this much more likely to happen.

What comes next?

The fractured political picture in Brazil underlines the fragility of progress and the need to institutionalize change as part of sustainable economic models. FOLU Brazil will continue to support the Government of Brazil, nationally and regionally, to make progress. Brazil hosts the G20 in 2024 and COP30 of the UNFCCC in 2025, offering real opportunities for Brazilian achievements at home to catalyze a tipping point in global ambition.



Brazil joins the ACF as part of an effort to engage in a broad alliance to support a lasting transformation in global food systems.

Paulo Teixeira,
Brazilian Minister of Agrarian
Development and Family Farming



Impact Story 9: Linking global ambition with local action

What is the problem we are trying to solve?

The world is not on track to meet either the Paris Agreement climate targets, the Sustainable Development Goals, or the newly defined biodiversity commitments to halt and reverse nature loss. Getting back on track means drastically reducing commodity-driven deforestation by 2030 and cutting wider food system emissions in half, all while meeting the nutritional needs of a growing global population, returning land to nature, and ensuring a just transition for farmers and other land users. This requires a radical transformation of our food and land use systems, driven by targeted system level, evidence-based policy action by and across all countries, including support by international institutions.

What did we do?

FOLU pushed food up the global agenda through strategic engagement bilaterally and via the multilateral system. FOLU has become a trusted thought partner to climate COP Presidencies, supporting the UK Government in delivering the COP26 Glasgow Leader's Declaration on Forests, and advising the UAE Presidency in COP28. This culminated in three landmark achievements, below. All of which were buttressed by FOLU strategic communications efforts, contributing to the 125% increase in media mentions of 'food systems' between COP27 and COP28. First, in the run-up to COP28, FOLU helped shape the [Emirates Declaration](#) for Sustainable Agriculture and Resilient Food Systems, endorsed by 159 countries collectively representing 70% of food production and over 5.7 billion people. Secondly, FOLU contributed to the [Non-State Actor Call to Action](#), which secured support from 204 organizations (including leading businesses in the food and land use sector). Finally, FOLU helped launch the Alliance of Champions for Food Systems Transformation ([ACF](#)) at COP28, supporting five anchor governments to commit to 'whole of government' transformations of their food systems, and continues to play an interim secretariat function during 2024.

What was our impact?

COP28 was a turning point for food systems and, with increased focus on including food within negotiations, marked new political momentum behind ambitious government action. The Emirates Declaration commits governments to expedite the integration of food systems into their nationally determined contributions (NDCs). The ACF provides a high ambition vehicle for countries to go further, faster. It includes a critical country in unlocking progress – Brazil. The Non-State Actor Call to Action ensured a shared future vision across public and private sectors.

Why does it matter?

By 2023, only 10 countries had committed to pursuing absolute emissions reductions from their agriculture sectors in their NDCs and underlying national climate plans. This lack of ambition also masked a deeper lack of action and awareness of the role of food systems for global climate, nature, and development agendas. Through strategic partnerships at recent COPs, new commitments, and political attention this is changing.

What comes next?

Global ambition without implementation will not change the system. Creating accountability mechanisms, attracting the necessary investment, and developing detailed implementation pathways are crucial next steps. The G7, G20, COP29 (climate) and COP16 (biodiversity) all provide opportunities to put in place this support scaffolding. Together with other global and national civil society actors, FOLU will continue its role of linking global ambition with concrete support to national action and implementation. FOLU will advise the UAE on Declaration follow up via its troika with Brazil and Azerbaijan.

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There is no path to achieving the goals of the Paris Agreement and keeping 1.5°C within reach, that does not urgently address the interactions between food systems, agriculture and climate.

H.E. Mariam bint
Mohammed Almheiri,
UAE Minister of Climate Change
& Environment



Reflections

This report outlines how FOLU has driven real world impact in the last few years. Building on the progress of the past seven years, the challenge now is to apply the learning creatively, enabling us to respond adeptly to the challenges involved in transforming a system that is as uniquely complex, unpredictable, and political as the food and land use system. This section seeks to distil some of the most important of those lessons and to reflect on how these will inform the ongoing work of the Coalition.

Anchor FOLU within existing government priorities and structures. FOLU's interventions and analysis are deployed most effectively when they speak directly to national political priorities, continually adapting to remain locally salient. Our ability to influence and enable change is entirely dependent on establishing of trusted relationships with key stakeholders within government and beyond. It is therefore critical our Country Platforms have the capacity, skills, and resources to nurture these relationships, garnering a deep understanding of government needs and responding to these in a way that illuminates the political and economic opportunities of ambitious reform, as much as the risks of inaction. Having pivoted from global ambition setting to in-country implementation in Phase 2 of FOLU, we are well placed to capitalize on this learning. As food and nutritional security continue to be threatened by ongoing conflict, financial instability, food price inflation and supply chain disruptions, our country teams will continue to ensure their efforts are expressed in ways that are politically salient.

International action remains critical. Progress is nowhere near fast enough to keep global climate, nature, and development targets within reach. As well as supporting countries to drive change at a national level, FOLU's pathways should also contribute to the delivery of key international frameworks such

as the SDGs, Paris Agreement and Kunming-Montreal Global Biodiversity Framework. Building on the impact we achieved at COP28, we will continue to work constructively through relevant multilateral fora whilst also supporting plurilateral efforts such as the Alliance of Champions. And by leveraging our unique network and composition to maximize learning links between local and global food system initiatives, we will ensure that global tools and initiatives remain relevant and useful at the local level.

Collaborate, cooperate, and build consensus. Food systems can only be transformed if the relevant actors throughout the value chain work cooperatively together. It is particularly important that those with the power to block progress are engaged constructively. During our first two phases, FOLU prioritized engaging policy makers in geographies sympathetic to a progressive agenda. Whilst this continues to be a key focus going forwards, we will also put increasing effort into working with business and financial institutions. One priority will be to help expand the availability and affordability of capital for alternative, more sustainable business models and practices, including for small scale farmers. We will also continue to build consensus around issues that threaten to derail the transition, leveraging evidence and deploying on-the-ground experience.

Deepen coalition collaboration. As a 'coalition of coalitions', FOLU needs to build strong links between coalitions as well as within them. FOLU will continue to deepen the collaboration between country platforms, and between international and national actions and partners, to support a more effective flywheel of action between the international stage and country-level transitions.



The only way to return back to 1.5°C is to phase out fossil-fuels, keep nature intact and transition food systems from source to sink of greenhouse gases. The global food system thereby holds the future of humanity on Earth in its hand.

Johan Rockström,
Director of Potsdam Institute for
Climate Impact Research



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