
UN trade & development
UNCTAD
Intergovernmental Group of Experts on
Competition Law and Policy
23rd session
8–10 July 2026 - Palais des Nations - Geneva

UNITED NATIONS CONFERENCE ON TRADE AND DEVELOPMENT

Intergovernmental Group of Experts on Competition Law and Policy 23rd session

Competition in global food value chains

Friday, 10 July 2026

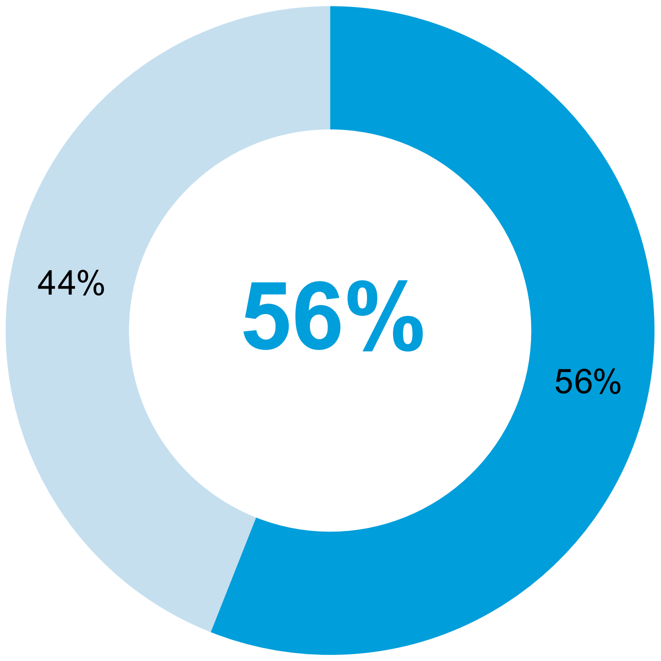
10:00 - 13:00, Room XII

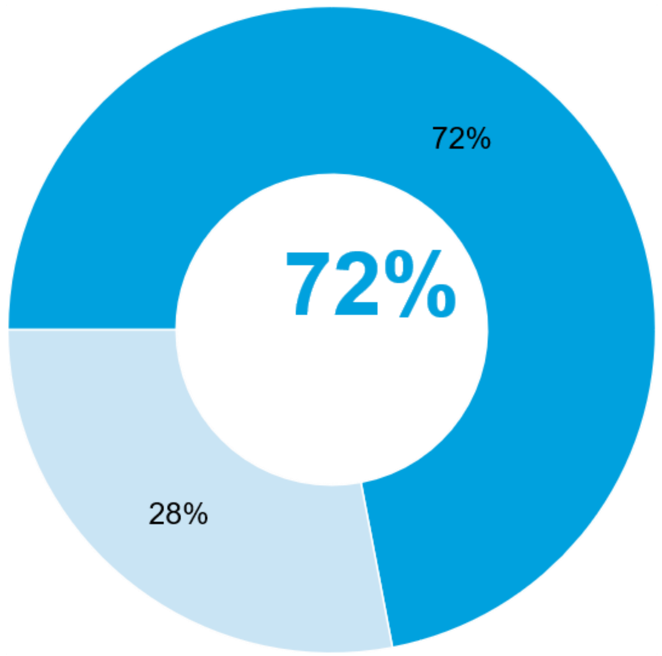
Introduction

- Share of agriculture value added in GDP is 25% in low-income and 15% in lower-middle income countries (World Bank).
- Across sub-Saharan Africa, food expenditure accounts for 40-55 % of household consumption; in parts of South Asia and LDCs, it can exceed 60% (World Bank and FAO).
- Greater concentration and consolidation in food value chains, both horizontally and vertically.
- Concerns about market power, and potential collusion and coordination this may facilitate.
- Implications for food security and affordability.

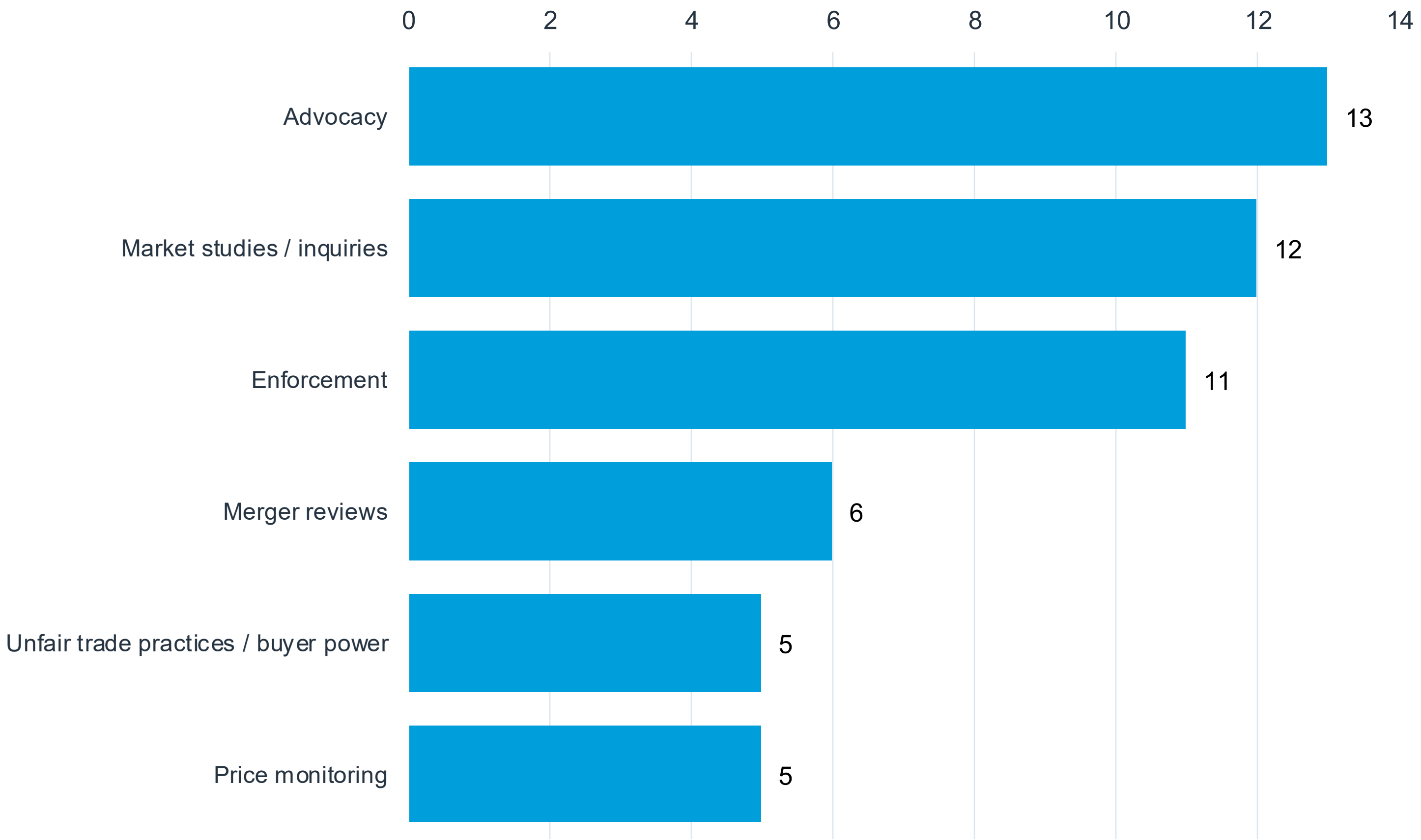
Concentration in global seeds and potash fertilizer markets (top 4 firms)

- Concentrated input markets can affect access, licensing terms and farmers' choices.
- High concentration can amplify exposure to price shocks and bargaining asymmetries for farmers, especially in import-dependent countries.





UNCTAD 2025 survey:
25 responding authorities' report enforcement



Reported actions

Counts show authorities reporting at least one action in each category. Categories are not mutually exclusive.

13
authorities reported advocacy

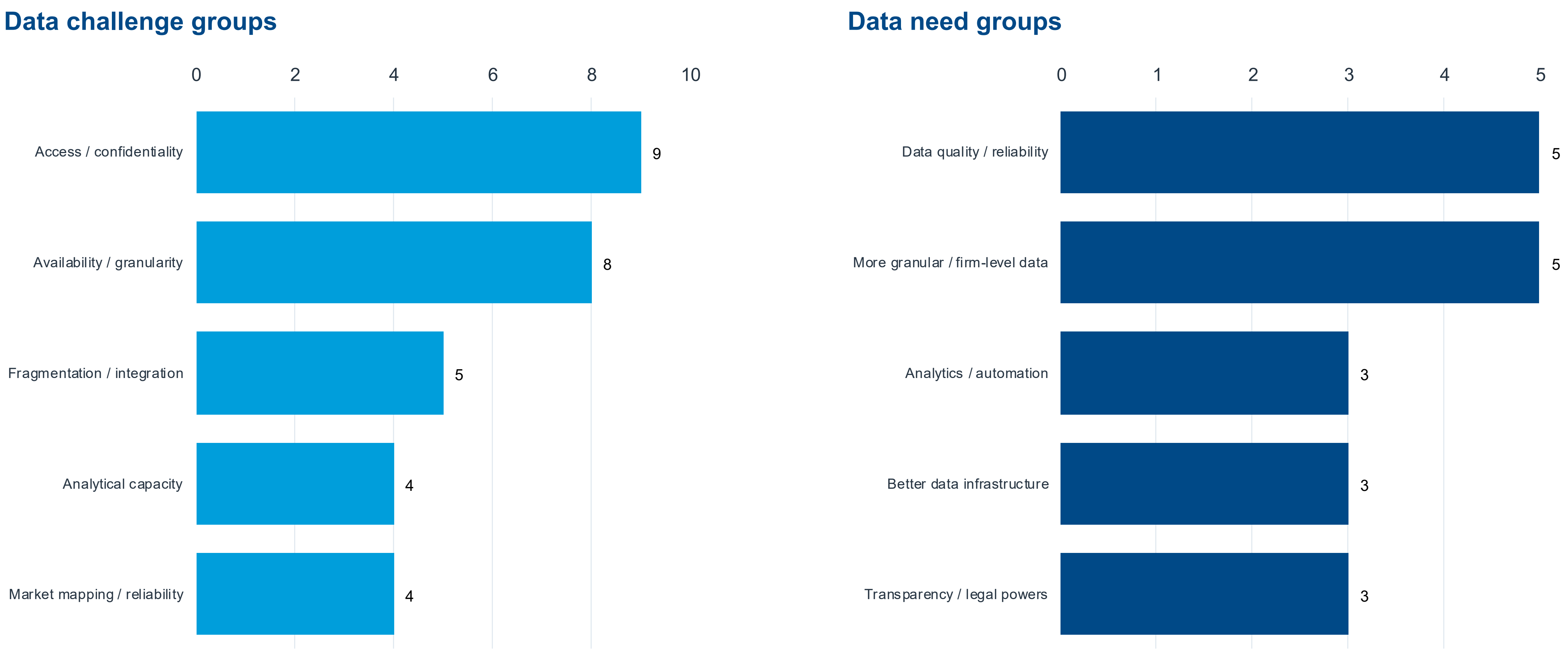
12
reported market studies / inquiries

11
reported enforcement actions

Market inquiries and advocacy tools were reported almost as often as enforcement.

Source: Responses by 25 competition authorities to UNCTAD survey in 2025.

Authorities report data gaps that limit their actions



Implication: Stronger legal powers, better data infrastructure and analytical capacity.

Source: Source: Responses by 25 competition authorities to UNCTAD survey in 2025.

Main findings based on UNCTAD 2025 Survey

Finding 1: Competition concerns are systemic and span all responding countries regardless of income levels.

- Across the 25 responding authorities, market concentration, vertical integration, cartel conduct, buyer power abuses and regulatory barriers in food value chains were identified as common issues.

Finding 2: Significant enforcement gap across value-chain stages

- The globally concentrated upstream stages — input markets and commodity trading — are where national authorities reported the least enforcement activity and the greatest challenges in addressing market concentration concerns as they occur beyond their jurisdiction. Processing and retail, which are more locally organized, are where enforcement is most active.

Finding 3: Same global firms but fragmented enforcement

- The same global firms appear in enforcement concerns across multiple jurisdictions, while authorities often lack the powers, resources, data and cooperation mechanisms needed for coordinated action.

Main findings: enabling effective intervention

Finding 4: Advocacy powers matter

- Competition enforcement in food markets need to be complemented by advocacy. Targeted competition advocacy can address competition concerns arising from sector-specific regulations or other government measures.

Finding 5: Data access is a major obstacle to effective enforcement

- Access to market data is a major obstacle to effective enforcement, especially in developing countries. Authorities reported recurring challenges in obtaining usable, reliable, granular and integrated data on supplier-retailer relations, importer- or brand-level activity, product-specific prices, price transmission and margins.

Thank You

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