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The food system has delivered major improvements in food safety, food security, and nutrition in the past century, contributing to the development of nations and to the wellbeing of individuals. Today, it faces unprecedented challenges. Population growth and a nutrition transition linked with increasing prosperity in emerging and developing economies call for further productivity growth in food production and distribution systems. At the same time, many countries, at all levels of income and development, experience the alarming consequences of over-nutrition and obesity, which co-exist with food insecurity and undernourishment. Demand is also growing for crops to be used in energy production, often sustained by government policies, with significant impacts on food markets. Food waste and losses, whether post-harvest due to poor infrastructure and poorly functioning markets, or in the distribution system, is a significant issue. Competing demands for natural resources, particularly soil and water, are growing while climate change introduces new uncertainties for producers. OECD work covers many of these dimensions, with the aim of supporting sound and effective government policies.

Health problems related to food, water and lifestyles are emerging as major concerns for governments. Of the top 20 risk factors for health, 10 are related to nutrition (and 4 of the top 6). While under-nutrition and micronutrient deficiencies continue to play an important role in morbidity and mortality in low income countries (responsible for the loss of 150 million healthy life years each year, according to the latest Global Burden of Disease estimates), the largest nutrition-related burden now comes from different forms of malnutrition, characterised by energy-rich and often nutrient-poor diets, and by an excess consumption of foods high in salt, sugar and fat, (responsible for the loss of 230 million healthy life years each year). The most dramatic, but not the sole, manifestation of this trend is the current obesity epidemic. Since 1980, obesity rates have doubled or tripled in many countries worldwide, and in more than half of OECD countries over 50% of the population is now overweight.

Work undertaken jointly by the OECD and the WHO, in the run up to the 2011 UN Summit on non-communicable diseases concluded that population-based policies encompassing health information and communication, fiscal incentives and regulatory measures, can generate significant health gains while entirely or largely paying for themselves through future reductions of health care expenditures, especially in low- and middle-income countries. A package of effective measures designed to improve nutrition and tackle obesity would add close to 1.7 million life years, every year, in major emerging economies, including Brazil, China, India, Mexico, Russia and South Africa, at an annual cost of less than 1 US\$ per head.

Since the publication of this work, one of the countries covered in the analyses has developed a major initiative to counter alarming obesity rates, which reflects closely the combined strategy envisaged by the OECD, and other countries that are also struggling with a major and growing obesity problem have followed in the same steps.

As I discussed in Roundtable 2 yesterday, OECD analyses have shown that available measures and programmes to improve the quality of nutrition would have negligible impacts on food commodity prices and markets, but even more drastic measures to bring countries in line with WHO dietary guidelines in the countries concerned, if accompanied by appropriate redistribution efforts, would be economically sustainable in the medium and long term.

Wherever on the spectrum of under to over nutrition, an unhealthy population can hamper development and create large social and economic costs. Governments need to better understand the driving forces behind current health outcomes in order to identify appropriate policy responses. Governments should strive to identify win-win policy levers that would improve health and nutrition while also contributing to resource sustainability.

Understanding the full range of demand-side and supply-side drivers of poor access to adequate food and unbalanced diets is a pre-requisite for identifying economy-wide policy levers to address current challenges in nutrition. Within the food system, a broad range of policy dimensions have a potential impact on nutrition and health outcomes, ranging from farm level interventions that change relative prices, agri-environmental policies, innovation and sustainability incentives, safety-related regulations throughout the food chain, private and public standards, labelling and packaging, and consumer information and education. Governments need to better understand what would be the effectiveness, efficiency and equity impacts of different policies to improve nutrition and dietary choices while at the same time ensuring adequate access to food for all population groups.

New and emerging technologies in food production, including biotechnologies and nanotechnologies, hold promise for improving nutritional outcomes and resource sustainability, while reducing waste. These technologies present opportunities for consumers, farmers and other stakeholders, but also challenges for food and environmental safety, and OECD is helping governments and industry to respond appropriately, for instance by encouraging governments to ensure the right balance between publicly and privately funded research and fostering public-private partnerships where these are appropriate.

Governments must step up their efforts in the pursuit of improved nutrition and health outcomes through effective and coherent food policies. The OECD is keen to continue to provide support to the development of these policies across all sectors of government action, through its data collections and policy analyses.