ostara

Reimagining
Food Value Chains

May 2025

Contents

1. Introduction

Over the past century, global food systems have helped feed a booming population, fuel economic growth, and reduce hunger in many parts of the world. These are not small achievements. The scale, consistency, and reach of today's agricultural and fisheries systems are extraordinary: a result of ingenuity, coordination, and hard-won progress.

The system has delivered — for many. But for others, it has come at too great a cost.

The system is built to produce large volumes of cheap calories, and by that measure — volume and price — it still works, particularly for large producers, commodity traders, financial institutions, and consumers in high-income markets.

But the cracks are showing. Climate shocks are intensifying. Ecological and social costs are mounting. Trust between actors is fraying, and health outcomes are worsening, with diet-related diseases rising rapidly even as hunger persists.

Considerable progress has been made to address these growing challenges, but despite numerous initiatives to shift an unsustainable trajectory, we remain stuck in a pattern of incrementalism. Too often, the dominant logic of the system curtails our imagination. Even those pushing for change often end up reworking the same tools, responding to the same incentives, and operating within the same mental models prioritising efficiency and growth, without questioning the system's underlying foundations, nor the ways in which it limits our imagination of what else might be possible.

At the same time, a new horizon is emerging. Across geographies, communities are experimenting with radically different ways of organising, producing, and relating to food and land. These efforts often remain fragmented or under-resourced, because they don't fit within the logic of the current system. Yet they hold great potential as we reimagine a system that can continue to deliver at scale and simultaneously operate on new foundations that prioritise people and planet.

Our invitation

Against this backdrop, with the support of the Gordon and Betty Moore Foundation, Ostara launched a vital exploration of how global agricultural value chains can better support equity, resilience, and biodiversity.

Between February and April 2025, we interviewed over 50 diverse global actors working across the agri-food value chain, and asked the following questions: What if we pushed the boundaries of possibility to reimagine agricultural and fisheries value chains so that they deliver for people and the planet? What keeps us stuck? And what feels too bold, risky, or radical, yet may hold the key to real transformation?

The interviews reflected a spectrum of perspectives. Some interviewees spoke of the success of the existing model, highlighting its productivity, scale, and efficiency. Others expressed unease, pointing to structural fragilities, inequities, blind spots and mounting externalities. Some saw incremental reform as essential. Others believed that a deeper transformation is needed: one that reimagines finance, ownership, and the story we tell about value.

This document presents the inspiration we gained from these conversations. Its purpose is not to provide a comprehensive analysis of the system and its existing challenges. Rather, it aims to highlight fundamental cracks in the system (***section 2***), surface areas of paradox and conflicting viewpoints (***section 3***), offer examples of promising solutions (***section 4***), and invite a deeper exploration of key provocations we believe could hold the biggest potential for systems transformation (***section 5***).

The provocations laid out in section 5 will be the starting point for a series of workshops — called Imaginal Studios — which we will be hosting over the coming months to gather more insights and understanding as we attempt to identify transformational opportunities.

We invite you to pause, listen, and embrace the paradoxes. Join us on a journey of exploration into what becomes possible when we allow our imagination to break free from logic that keeps us stuck, and make space for collective dreaming of new pathways. Together, we hope to foster the emergence of innovative strategies, approaches, and solutions that can move us beyond the current extractive paradigm, and shape a new collective narrative for food value chains.

Farmer working in a rice field © vsoldatov7

2. Cracks in the System

What We Heard On What Keeps Us Stuck

We won't rehash every challenge, as the problems with the current food system are well-documented elsewhere: resource degradation, inequality, growing obesity and other dietary diseases, fragile supply chains, climate stress, etc. What the interviews surfaced, however, is that many within the system feel its limits acutely — and know that more pledges, certifications and toolkits are not enough. Many of these cracks reflect not just technical breakdowns, but deeply entrenched power dynamics about who gets to decide, who captures value, and who bears the risks.

From the interviews we have conducted, the following cracks emerged:

- ***Extractive finance that externalises costs and concentrates value***. The system is seen as perfectly designed for its current purpose — to maximise profits for large corporations and investors. Power is heavily concentrated mid- and downstream, whereas producers, particularly smallholders, and local communities are frequently at the mercy of these global power structures.
- ***Disconnected supply chains that weaken producer agency and local resilience.*** The modern agricultural system has created significant distance — both geographical and relational — between producers, landscapes, companies and consumers. Producers face challenges such as lack of land tenure, poor access to markets, and fluctuating commodity prices, often making it difficult for smaller producers to compete with larger, industrialised farms. A lack of financial incentives for 'sustainability' is a barrier to transition to better practices.
- ***Governments are at the mercy of electoral cycles and corporates lack incentives to drive real change.*** Government intervention is considered necessary but is hindered by the short timeframes of political cycles and a lack of sufficient resources for law enforcement or extension services. Most corporates prioritise creating shareholder value and are not incentivised to drive systems change. As a result, sustainability efforts remain voluntary and are rarely fully integrated into core procurement or business strategy. Actors within the system often blame each other for the challenges it causes.

Approximately two-thirds of the world's food-insecure population are smallholder farmers.

- ***Technocratic and short-term fixes sidestep deeper transformative change.*** While technology offers real opportunities, it also risks deepening inequalities, and tends to focus on incremental changes to make the system slightly less harmful. Many innovations underpinning industrialised production rely on constant external inputs, creating both economic fragility and negative environmental impacts. And because the food system is so complex, tech "solutions" often fail to transfer across contexts or lead to unintended consequences such as leakage.
- ***A loss of meaning as land, food and labour are reduced to price points.*** The pressure to keep food cheap to meet ever increasing demand has changed the way we value and consume food. The origin of food, the people who produced it, and the health of consumers and production landscapes are ignored and disregarded in favour of cost efficiency. More sustainable alternatives are often more expensive, which limits their uptake.

Financial district of London at night, England ©conceptualmotion

These dynamics suggest the food system is not broken *per se*; it is operating exactly as designed to deliver large quantities of cheap food. Yet this also means the system externalises environmental and social costs, and consolidates power in the hands of a few, deepening inequality. Efforts to reform it through narrow and siloed technocratic fixes, corporate pledges, or top-down governance schemes fail to address its underlying architecture of inequality, disconnection, and commodification.

Real transformation requires more than tweaks to the existing machinery and instead a reimagining of the purpose, values, and power relations that shape food systems.

This may include facing the difficult reality that the current system benefits those with the most to lose from meaningful change. Without redistributing power and redefining value, sustainability risks becoming another means of preserving the status quo.

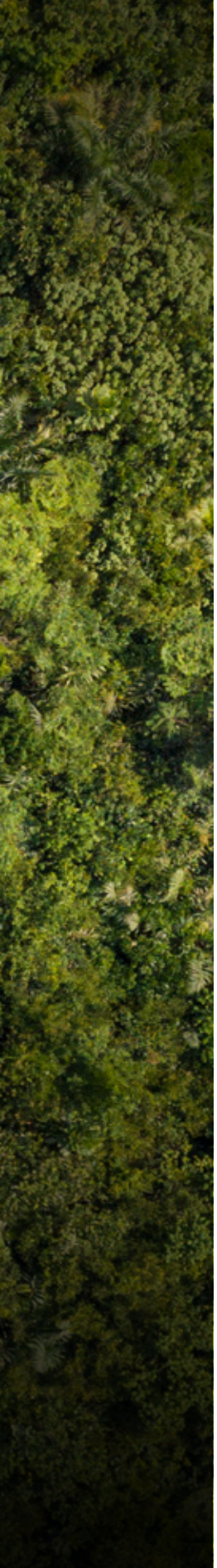
Food prices have come down, yet 3 billion people still can't afford a healthy diet

3. Tensions

Conflicting Worldviews on What Needs to Change

The transition to sustainable food systems will need to address fundamental differences in worldviews and perspectives on what needs to change, and which actors are best placed to drive that change. Summarising perspectives from our interviews, we highlight critical tensions revealing not only contrasting viewpoints about what future food systems should look like, but also underlying ideological differences over who sets the agenda, who benefits, and what trade-offs are deemed acceptable.

Deforestation near Lieki, DRC. ©Axel Fassio/CIFOR



- ***Competing priorities and time horizons.*** Different stakeholders prioritise different outcomes that can be at odds with each other: profits, economic development, food security, livelihoods, biodiversity protection and climate change mitigation. Similarly short-term benefits continue to prevail over impacts that can only arise over longer time horizons.
- ***Clean supply chains vs. landscape impact.*** When looking specifically at the issue of commodity-driven deforestation, there was considerable debate around the primary strategic objective: is the goal to achieve "clean supply chains" or to achieve positive change at the broader landscape level? Focusing solely on commodity supply chains often neglects broader land use and equity issues, and simply shifts the problem elsewhere, whereas focusing on landscape outcomes is perceived to be too complex, too slow and may fail to address power imbalances and broader systemic issues. Whilst best practice has established that both are necessary, disagreement over which to prioritise, who bears responsibility and how to implement has slowed meaningful progress.
- ***Change will be driven by corporates and markets vs. through policy and bottom-up movements***. Some interviewees believe you need to work with the big corporate players if you are going to change the game. Others suggested that focusing on big corporations has limitations — particularly given most action is voluntary — and a bottom-up approach is needed. Interviewees felt that producers and local communities are integral to driving change but are often absent from the dialogue and may lack agency.

Some pointed to the inherent conflict in expecting corporates to take action that is not aligned with the policy environment. They emphasised that without meaningful action by governments, through better and stricter regulation and enforcement, other strategies will fall short. Others suggested that without fundamentally dismantling the control that companies hold over the trade of commodities, there was no hope at all for a sustainable food system transition.

Tensions between working within market constraints to achieve sustainability and the need to break free from them clearly emerged.

- ***New bold ideas vs incremental change:*** There is scepticism about whether current sustainability efforts are truly driving transformation or just shifting problems geographically. Some believe that there has been little progress in areas like commodity-driven deforestation, while others feel that continuous improvement of existing systems may be undervalued compared to seeking entirely new "sexy" solutions.
- ***Top-down global solutions vs. tailored place-based approaches:*** Some interviewees stressed that there are no "silver bullet" solutions that can be implemented at global scale. The EUDR was raised as an example of a policy instrument with the best of intentions, but which created unintended consequences. These include significant negative impacts on smallholders, and the allocation of resources towards logistics and supply chain operations rather than towards a shift in land use practices.
- ***Regenerative agriculture vs. sustainable intensification:*** Some highlighted that regenerative agriculture is a set of bespoke interventions based on context, making it challenging to create a universal framework for scaling. Others felt regenerative agriculture is not clearly defined, and companies are using it to green-wash. Differences also existed in the extent to which interviewees felt regenerative agriculture can coexist with sustainable intensification.

These tensions do not yield easy resolutions but instead underscore a central reality: systemic transformation will require grappling with contradictions, power imbalances, and competing priorities across scales, identities, ideologies and politics. Rather than searching for singular solutions, the path forward may lie in embracing multiple viewpoints: recognising that both top-down and bottom-up strategies each have a role, that global frameworks must adapt to local realities, and that all actors have an important role to play to drive system transformation. True sustainability will depend not on "silver bullets", but on negotiated, often uncomfortable shifts amid complexity.

4. Seeds of Renewal

Where Change Is Already Taking Root

Amidst these contradictions, we also heard glimmers of possibility from the interviews — shifts in thinking and practical experiments that, while nascent or small-scale, point toward more just, resilient, and regenerative futures. These "seeds of the new" reflect promising ideas as well as real work already underway, offering signs of how transformation may be starting to take root. If implemented cohesively and strategically, these could begin to form the foundation for a more resilient and just food future:

- ***Use finance as a lever of transformation.*** Municipal green bonds, regional and local development banks, community-scale finance, adjusted loan terms, mechanisms to balance windfall commodity profits, and incentives tied to outcomes (e.g. bundled insetting) are all ways through which finance is starting to be used to unlock more sustainable practices. Several landscape finance mechanisms are emerging (e.g. LENS, Commonland, Rimba Collective) that offer some potential for collective investment in resilience. Similarly, AGRI3 or Climate Investment Lab are examples of how insurers, pension funds and sovereign wealth funds can divest from destructive systems and reinvest in resilient, long-term solutions that blend finance. Assisting producers with levelling the playing field on tariffs or dealing with expensive leases offers another promising approach.
- ***Leverage policy to realign incentives to reward resilience and regeneration.*** From redirecting agricultural subsidies and offering flexible finance to enforcing fair price floors and sustainability-linked taxation, public policy has powerful levers to stop subsidising ecological harm and instead reward positive outcomes. An example of this is US government tax credits, which rapidly shifted what farmers grow. Policy levers can also be used to reshape demand, such as through procurement reform, agri-environmental incentives, better enforcement of existing environmental regulations, and public health campaigns promoting sustainable diets. Interviewees raised other ideas at varying stages of experimentation, including codex reform, carbon border adjustments, and global standards which, if designed appropriately, have the potential to build greater equity into the system.

Community-Based Commercial Forestry Project, Yogyakarta ©Aris Sanjaya/CIFOR

- ***Democratise innovation for the public good.*** Technological breakthroughs (e.g. climate-adapted crop varieties, cultured meat, algae-based feeds, AI for risk modelling, blockchain for transparency) offer potential, as long as they are governed well, to avoid deepening existing power asymmetries. Open-source platforms and decentralised data ownership offer tools to democratise innovation and align with producer needs — providing opportunities to rethink who holds intellectual property, who benefits from innovation, and who gets a say in their design and deployment.
- ***Restructure value chains to reward equity, stewardship and sustainability.*** Shifting towards decommodified and decentralised models could redistribute both value and power, for example by building local processing and trading that disintermediates current value chains (e.g. Pacific Island Tuna). Other approaches include embedding more fairness and more transparent value distribution (e.g. Tony's Chocalonely), as well as more traditional models such as farmer cooperatives or unions.
- ***Transform agri-culture and consumption norms.*** While consumption was not explicitly the focus of our enquiry, interviewees raised it as an important leverage point whereby synchronised actions across fiscal measures, public procurement, education campaigns, and marketing practices could change consumption at scale. Diet shifts towards plant-rich, less processed food offer high-impact, low-cost leverage. This can be further incentivized by making the full cost of cheap food visible. It also goes hand-in-hand with supply side shifts to more diverse, localised, resilient practices, whilst empowering producers with capacity, resources and greater knowledge exchange.

These "seeds of the new" reflect real work already underway

While efforts to reform the current system remain important, too little attention has been given to supporting the emergence of new possibilities and pathways. Many of the ideas shared here reflect early signals of a system in transition — often underfunded, marginalised, or misunderstood. If we are to meet the scale of the challenge ahead, we must find ways to hold both: improving what exists, while intentionally nurturing new models, relationships, and paradigms that could chart a different path.

5. Provocations *for Deeper Enquiry*

While the previous section highlighted emerging ideas, solutions and shifts underway, this one draws out deeper questions — thematic provocations that emerged both from the interviews and Ostara's own enquiry. Each provocation points toward critical areas where deeper imagination, honest dialogue, and new forms of collective practice will be needed if we are to move beyond the limits of the current paradigm.

These are not conclusions, but invitations to imagine how agri-cultural commodity systems might be further reshaped and refined in service of equity, resilience and biodiversity. They are offered for exploration inside Ostara's Imaginal Studios and beyond.

"You never change things by fighting the existing reality. To change something, build a new model that makes the existing model obsolete."
— Buckminster Fuller

Provocation 1: Imagination, Narrative, and Meaning-Making

The interviews revealed a striking dissonance between sectors, geographies, and communities, not just about what should be done, but about how change happens.

This provocation examines how our worldviews, mental models and assumptions shape our narratives about food, land and trans-formation. And how in turn, those narratives influence social norms and structures — with the potential to open up spaces for relational and less extractive futures. It interrogates who gets to speak, whose knowledge counts, and how to build trust in divided systems.

Questions for reflection:

- ***Story, worldviews and cultural assumptions:*** What stories and metaphors shape how we understand and relate to food, nature, community, value, and progress — and who gets to define them? What if we became more aware of the impact of our worldviews and cultural assumptions on the stories we tell ourselves, and the beliefs we hold about what is possible?
- ***Trust and legitimacy:*** What kinds of language, framing, and co-created narrative can build trust across historically adversarial actors and embrace diverse frames of reference and meaning-making? What does a narrative of shared responsibility and collective agency look like?
- ***Shifting perspectives:*** How can we use visual, embodied, ritual or artistic practices to shift perspectives and invite deeper insights and connection?

Provocation 2: Reimagining Value and Decommodifying Food

At the heart of many interviews was a discomfort with the reduction of food, land, and labour to pure market commodities at the expense of socio-ecological outputs. Whether through corporate metrics, certification schemes, or yield-obsessed agronomy, value is flattened into price and profit, and everything else becomes irrelevant.

This provocation invites us to explore how value is defined, distributed, and who decides. It asks what becomes possible if we start from a point of relationship, instead of commodity.

Questions for reflection:

- ***Place-based economies:*** How can food systems be grounded in the unique ecologies, cultures, and relationships of a place, alongside economic productivity?
- ***Valuing the unvalued:*** How could we prioritise and value sovereignty, regeneration, and sufficiency alongside economic productivity? How do we honor temporal rhythms — when ecosystems heal over decades, but markets trade in milliseconds?
- ***Business model innovation:*** How might business models reward outcomes like soil health, nutrient density or livelihoods, not just volume or margin? What if input companies became regenerative service providers?
- ***Food as a right:*** What governance structures (e.g. public procurement, land trusts) could reposition food as a right, not a product?

Multi generational farmer team holding wood boxes with fresh organic vegetables ©DisobeyArtPh

Provocation 3: Power, Governance, and Accountability

Here we surface the persistent challenge of concentrated power and weak accountability.

The goal is not to vilify any one actor, but to understand how power dynamics have historically and continue to shape outcomes — and how alternative governance structures might unlock more equitable, participatory, and reparative futures. Who benefits, who pays, and who gets to be at the table when new rules are being written?

Questions for reflection:

- ***Power redistribution:*** What are the limits of corporate self-regulation, and where is external accountability essential?
- ***Supply chain architecture:*** How can we redesign supply chains to share control and accountability, not just trace risk? What would collaborative transparency as a shared tool for improvement and trust-building look like?
- ***Producer agency and local power:*** What examples exist of shared governance, democratic decision-making, or producer-led coalitions that redistribute power? How could royalties, dividends, or service contracts help do this?
- ***'Hospicing' parts of the current system:*** Are there parts of the current system that need to be wound down or radically transformed,, rather than adapted, to accelerate any transition. Who gets to lead that process?

School of yellowfin tuna. ©imagesourcecurated

Provocation 4: Financing the Transition

Finance is often cited as the biggest barrier, but also the most powerful enabler of change. This provocation doesn't just ask where money comes from, but what it's for, who controls it, and how risk and return are defined. It invites reflection on both transition finance (e.g. catalytic capital, subsidies, blended models) and deeper questions about what kind of financial infrastructure is fit for the future..

Questions for reflection:

- ***Incentives:*** What mechanisms (public, private, philanthropic) are needed to incentivise real transformation, not just optimisation?
- ***Risk perception and capital logic:*** What if more regenerative systems were seen as lower risk due to their long-term resilience? Could we re-engineer insurance, credit, and subsidy systems to reflect this?
- ***Blended finance and catalytic capital:*** How can catalytic capital facilities be structured to accelerate innovation and reduce risk for regenerative models? What can we learn from existing and emerging models?
- ***Community-scale finance:*** What would decentralised, place-based finance look like, from community banks to bioregional investment platforms? What can we learn from existing and emerging models?
- ***Finance as relational infrastructure:*** Could finance become a relational infrastructure that supports stewardship, reciprocity, and resilience — rather than short-term extraction?

6. Conclusion

The current agri-food system delivers, but increasingly at ecological and social cost. Yet in the face of deepening paradoxes and rising uncertainty, it continues to crowd out alternatives and constrain the very imagination we now most need. By promoting a singular vision of industrial efficiency and market logic, it suppresses plurality — narrowing the space for models that could offer greater resilience, equity, and ecological integrity.

We must continue the important work of reforming the dominant system: after all, it still feeds billions and will continue to play a central role for years to come. But this work alone is not enough. We must also support the emergence of the new — investing in alternative pathways, sharing power with those experimenting on the edges, and building parallel infrastructure that can carry us toward a more life-giving future. As in the energy transition, where renewables had to be incubated alongside the continued use of fossil fuels, this is not about a sudden rupture, but about enabling transition finance, rebalancing attention, and intentionally resourcing the future we hope to inhabit.

This requires *imagination*, not as a luxury, but as a strategic necessity. Without new mental models, we will keep pouring piecemeal innovations into old systems and wonder why transformation remains out of reach. It also requires *courage*: to name uncomfortable truths, to challenge entrenched interests, and to take risks in pursuit of deeper change. And it requires *collaboration* — across sectors, ideologies, and lived experience — to cultivate the trust, relationships, and collective intelligence that any real shift will demand.

Ostara's Imaginal Studios are one such space — not to debate the perfect solution, but to sit in the paradoxes, open new conversations and practice the kind of systems thinking, collective visioning, and grounded experi-mentation that true transformation demands. Alongside enquiry and imagination, we'll also roll up our sleeves to shape practical ideas and solutions that can help advance the emergent system.

Be it as part of our Imaginal Studios or beyond, we invite you to join us in this endeavour. To not just reform the food system, but to reimagine and remake it.

To ask different questions. To share power. To redefine value. And to begin, wherever you are, to plant the seeds of the system we need next.

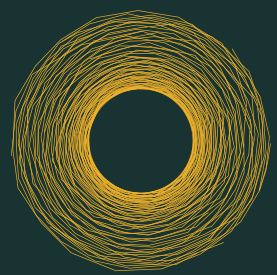
"We need to reclaim the power of our imagination — to push to the edges of the system, and allow ourselves to dream beyond it."

— Ostara

Young Plant ©amenic181

We are tremendously thankful to all the interviewees who kindly gave us their time and expertise to talk to us about these topics. This work would not have been possible without you!

This work was funded by the Gordon & Betty Moore Foundation



ostara

www.ostaracollective.org | connect@ostaracollective.org | ostaracollective