AGRICULTURAL POLICY LANDSCAPE
SYMPOSIUM
13 AND 14 JUNE, 2018

AGRICULTURAL GLOBAL TRADE AND FOOD SECURITY: SOME MAJOR TRENDS

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FIVE STRUCTURAL TRENDS IN AGRICULTURAL TRADE

1. GROWING DEPENDENCE OF GLOBAL FOOD SECURITY ON TRADE

2. MORE PLAYERS FROM DEVELOPING AND EMERGING ECONOMIES CREATE A MORE COMPLEX TRADING ENVIRONMENT

3. FOOD TRADE WILL BE DOMINATED BY A SMALL NUMBER OF FOOD NET IMPORTING/EXPORTING COUNTRIES

4. CONSUMPTION PATTERNS DIVERSIFY BUT TRADE COMPOSITION MIGHT NOT

5. TRADE IS PART OF THE SOLUTION TO CLIMATE CHANGE CONCERNS DERIVED FROM AGRICULTURAL PRODUCTION
A continuous trend towards the internationalization of the food market

Percentage of calories produced that cross an international border

- 1975: 12.3%
- 1985: 13.9%
- 1995: 16.1%
- 2005: 18.2%
- 2015: 19.1%
FOOD PRODUCTS IMPORTING COUNTRIES

1990

2015

THE SIZE MEANS PREDICTED GROWTH ON DEMAND FOR FOOD FROM 2000 TO 2030

Annual growth in nutritive intake per capita (2000-2030)

SE Asia, Africa and India are the main food demand pullers

Sources: United Nations, FAO, LDC analysis
FOOD PRODUCTS EXPORTING COUNTRIES

1990

2015

FOOD TRADE BETWEEN DEVELOPING MARKETS HAS INCREASED
PRODUCER SUPPORT ESTIMATE, THREE YEAR AVERAGE (2010-2012)

Source: Illescas, Nelson; Jorge, Nicolás; and Perini, Sofía C. 2017
MAJOR NET FOOD EXPORTERS (INCLUDING FISHING)

Pablo Elverdin on the basis of TradeMap
MAJOR NET FOOD IMPORTERS (INCLUDING FISHING)

Pablo Elverdin on the basis of TradeMap
GLOBAL IMPORTS OF AGRIBUSINESS PRODUCTS, BY GRADE OF PROCESSING

million of dollars

FIRST TRANSFORMATION
SECOND TRANSFORMATION
NO TRANSFORMATION

Fuente: Fundación INAI en base a OMC
FOR THE FIRST TIME THE GLOBAL DEMAND WILL HAVE ITS LARGEST COMPONENT IN ANIMAL FEED

AGRICULTURAL GLOBAL DEMAND (BILLION TONS)

- 1960: 0.8
- 1970: 1.2
- 1980: 1.6
- 1990: 1.9
- 2000: 2.1
- 2010: 2.8
- 2050: 5.2

- Food
- Animal Food
- Bio Fuel
Net emissions of Rural sector activities are slightly favorable in all MERCOSUR countries and specially in Argentina.

Countries/regions with ample natural resources that use appropriate technologies will have less CO2 emissions.
THANK YOU
<table>
<thead>
<tr>
<th>Country</th>
<th>1995</th>
<th>2015</th>
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<tbody>
<tr>
<td>Japan</td>
<td>62%</td>
<td>43%</td>
</tr>
<tr>
<td>UE</td>
<td>35%</td>
<td>19%</td>
</tr>
<tr>
<td>USA</td>
<td>9%</td>
<td>9%</td>
</tr>
<tr>
<td>China</td>
<td>6%</td>
<td>21%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>6%</td>
<td>29%</td>
</tr>
<tr>
<td>Russia</td>
<td>15%</td>
<td>15%</td>
</tr>
</tbody>
</table>
ADDITIONAL ARABLE LAND WHICH COULD BE IN USE IN 2050 IN SELECTED REGIONS (MILLION HA)

Source: Van der Mensbrugghe, D. FAO. IADB and CIAT Seminar, March 2012.
ADVANCES OF DEVELOPING COUNTRIES IN GLOBAL AGRICULTURAL PRODUCTION

Share of World Agricultural Production
(PPP US dollars 2004-2006)

- Developing and emerging w/o China and India
- China
- India
- European Union
- USA + Canada
- Developed
- LAC

1990s, 2000s, 2010s
ANNUAL RENEWABLE WATER RESOURCES PER CAPITA
(THOUSAND CUBIC METERS PER YEAR)

MAJOR FOOD NET EXPORTERS
(INCL. FISHING)
What’s on the world’s menu

Daily calories per person by type of food

- Cereals, roots and pulses
- Sugar
- Vegetable oils
- Meat
- Dairy
- Other

Source: FAO