

# FOOD (IN)SECURITY: MERCOSUR RESPONSES IN A CONTEXT OF GREATER GLOBAL DEMAND

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## **1. Introduction**

Latin America and the Caribbean (LAC) in general, but the economies of the four full members of the Southern Common Market – Argentina, Brazil, Paraguay and Uruguay – (henceforth Mercosur 4) in particular, are some of the world's primary food-producing areas. This is thanks to indicators that show high natural resource endowment, fertile land suitable for the planting of diverse crops, water availability, qualified human resources applied to the management of eco-sustainable agri-food policies and strategies, foreign and domestic investment that have increased yields and productivity over the years, and biotechnical advances. They characterise a highly competitive production zone comprising the four economies that make up the Mercosur 4 bloc.

Over the last two decades, global demographic changes led by China and a dynamic India (which together account for 44% of the world's population) have powered production; markets once closed or where access was limited by tariff barriers (TBs) and nontariff barriers (NTBs) have opened up; trade has liberalised thanks to rampant globalisation; and there has been sustained global demand for agricultural commodities and food arising from processes of urbanisation, with breakneck growth particularly in the emerging economies of Asia, Africa, LAC and Southeast Asia. These have been and continue to be the drivers behind decisions on public and private investment, expansion of farming activities, consolidation of agribusiness chains and the promotion of technological innovation.

Since the start of the 21<sup>st</sup> century, the incorporation of new technologies applied to improve yields, an increase in exportable surpluses, the expansion of the agricultural frontier in each of the member countries, an upsurge in the use of fertilisers, and the lure of the expansion of the food-processing industry in China, India and Southeast Asia associated with dietary and nutritional changes among the emerging urban middle classes have coincided with a boom in international prices of agricultural commodities. In addition, alliances among European, US and Asian producers, logistics firms and technological companies via mergers and

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acquisitions increased the options of intra-Mercosur agri-food business and raised its export profile. Over the last five years, in the face of the disruption caused by the pandemic and the war between Russia and Ukraine, the Mercosur 4 economies have, to varying degrees, managed to make the most of a favourable international situation to recast themselves as reliable global suppliers that help to uphold the principle of food security.

In fact, despite the different incentives employed by each member country, the bloc forms an expanding area of food supply and export that is set to be even more significant in the years to come. For that reason, assuming subregional co-responsibility in the management of a sustainable global agri-food system, Mercosur 4 offers resilience in the face of possible future crises.

Given the above, this chapter posits the idea of the importance of the Mercosur 4 economies in moderating and/or mitigating shifts in levels of production, trade, export and global supply of food. The appreciation of their natural assets and production capacity, in particular, in the European Union (EU) and China are proof of that. On the basis of these considerations, what follows is an analysis of national and regional strategies and approaches to policies by Brazil, Argentina, Paraguay and Uruguay, the Mercosur 4 members.

## **2. Latin American and the Caribbean as a supply base**

According to the definition provided by the Inter-American Institute for Cooperation on Agriculture (IICA), “the agri-food system is a complex, dynamic and comprehensive concept that refers to a set of production chains installed in a given territory (rural and urban) that operate thanks to the dynamics of social actors in a given national and international macroeconomic context. These production chains are supported by a set of natural resources and operate in tandem with consumer demands”. LAC is one of the most important net food exporting regions in the world and the Mercosur 4 economies make a particularly significant contribution. (IICA, 2021a).

From the European perspective, LAC is a major contributor to global agriculture. Between 2020 and 2022, it accounted for 14% of the net value of agricultural and fishing production globally (European Commission, 2023). According to the Food and Agriculture Organization of the United Nations (FAO), the region accounts for 13% of global production of agricultural and fish products, and 17% of the net value of exports of these products. They are share percentages that, according to the forecasts of the UN agency and the Organisation for Economic Cooperation and Development (OECD), will increase over the decade (OECD-FAO, 2022). By 2032 they are set to reach a global export share in excess of 30% for crops of corn, soybeans, sugar, beef and poultry, and fish flour (USDA, 2023).

From this perspective, the Mercosur 4 countries are set to reassert their regional production leadership, boosting exports and benefiting their respective trade balances and national development strategies.

### **3. Mercosur 4: production and export expansion, associated factors**

The Mercosur 4 account for 62% of the population of South America and 67% of its GDP. The area's exports include soybeans, corn, beef and sugar cane (IICA, 2023). Its main export destinations are Asia (60%) and the EU (13.2%). By country, the top positions are held by China (26.8%), the United States (3.5%), India (3.2%) and the Netherlands. In 2022, exports from the Mercosur 4 countries increased by 18.2%, or \$71bn (by 36.5% in 2021). Most of the growth was attributable to an increase in exports from Brazil and to, a lesser extent, Argentina, which saw its soybean exports hit by a severe drought (ECLAC, 2023).

A string of factors explains the bloc's expansion in terms of production and exports. One of them is the expansion of the land used for agriculture (IICA, 2021a), a process common to all four economies since the start of the century. Brazil, for example, went from having 30.3m hectares of land available for soybean cultivation in 2013/14 to 43m in the 2022/23 crop season. In the case of Paraguay, it has tripled the area sowed with soybeans over the last 20 years and the share of agricultural production in exports increased from 35% to 43% in the same period. In Argentina, the introduction of genetically modified soybeans in the mid-1990s triggered a production revolution that saw planting spread to other provinces and regions that had previously been considered unproductive. This process is continuing with the reclaiming of land previously used for pasture and, partly, because of advancing deforestation, which is particularly serious in the Amazon.

The current situation and the trends under way suggest that the process will continue to drive leaps in both production and exports. OECD-FAO projections on the incorporation of agricultural land for crops 2020-22 to 2032 indicate that LAC is set to gain 8m hectares, with gains too for India (10m), sub-Saharan Africa (16m) and China (1m), while there will be sharp drops in Europe and Central Asia (20m hectares) and North America (3m) (OECD-FAO, 2023). As a result, over the coming decade the shifting location of the main production bases are set to further strengthen the role played by African economies and Latin American producers.

These projections imply attractive conditions for the reception of foreign direct investment (FDI), increases in public investment, use of new technologies – drones, artificial intelligence (AI) –, innovations in farm machinery and careful management of natural resources through the application of climate-smart, regenerative agricultural techniques (European Commission, 2023).

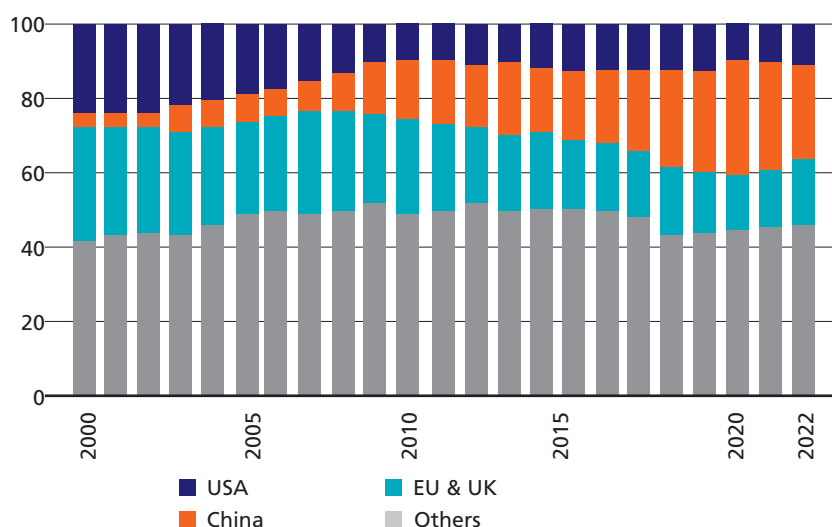
#### **3.1. The pandemic: a window of opportunity?**

The COVID-19 pandemic established the need for sustainable agri-food strategies and bolstered Mercosur 4's role as a global supplier. This was boosted still further by the outbreak of the Russia-Ukraine war and the resulting destruction of production bases, grain stocks and the disruption of regional supply chains that hit markets in the EU particularly hard.

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The pandemic brought new challenges like changes in consumption patterns because of prolonged isolation and additional demands on the quality of imported products. It also caused severe global trade disruptions because of unilateral suspensions of exports over fears of domestic shortages and import blockages and/or restrictions. As a result, the need to replace supply sources and cushion the impact on food security increased the importance of Mercosur 4 as an alternative supplier both to Europe and, especially, to China, whose production bases were hit by the spread of the pandemic among factory workers and farm labourers, as well as by interruption of agricultural activity.

**Graphic 1. Destination of exports from Mercosur 4 (%)**



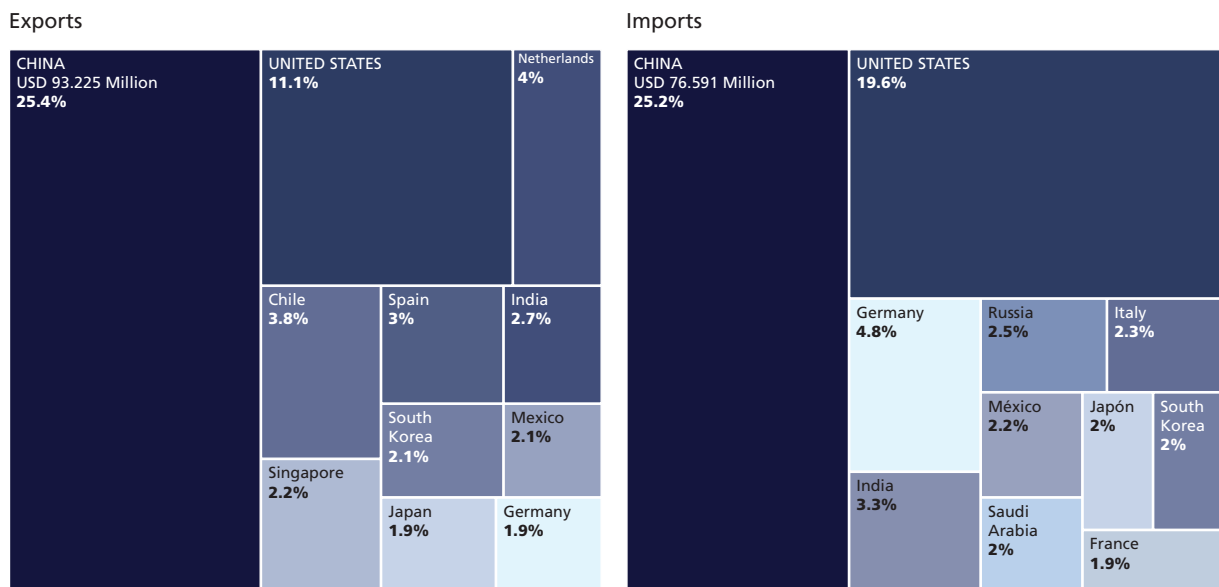
Source: Percentage changes in destination of exports from Mercosur between 2000 and 2022, © Sophie Ramis, Helena Gisbert Sánchez / AFP, 2023

As a result of these changes, in 2022 Mercosur 4 exports increased by \$71bn over the previous year. Most of this increase was down to exports from Brazil and, to a lesser degree, from Argentina, while the contributions from Uruguay and Paraguay (the world’s fourth-largest soybean producer) were limited by production scale differentials (ECLAC, 2023).

### 3.2. Drive from China

Economic exchange in general, and two-way trade between Mercosur 4 and China in particular, have expanded over the last two decades. The Chinese economy’s high rates of growth, rising demand for grain and cereal on the part of its oil-processing industries and greater protein consumption (meat) among its emerging and potent middle class are driving subregional sales whose final destination is the Chinese market. The main Mercosur 4 exports to China include soybeans, pellets, soy flour and barley. Brazil is China’s main partner in South America and a key exporter to the Asian giant thanks to its competitive agricultural sector. In Argentina’s case, 62% of its sales of agricultural products go to China, as well as 90% of its beef sales.

**Table 1. Mercosur 4 trade, main importers and suppliers 2022**



Source: Mercosur

Despite Paraguay maintaining diplomatic relations with Taiwan, trade with China has doubled over the last eight years. In Uruguay’s case, exports to the Asian giant (excluding free zones) came to \$1.5bn in 2022, a 27.4% increase over the same period of 2021 (*Revista Parlasur*, 2023).

Another variable to take into account in China’s relations with Mercosur 4 in terms of agriculture are the investments made by Chinese state-owned and private companies in the subregion’s agricultural sector. Chinese capital has arrived in search of agricultural production opportunities, development and innovation in seed genetics and improved beef. Financing provided by Chinese state banks flows largely into bi-oceanic infrastructure and port logistics projects at a national and subregional level, under the Belt and Road Initiative (BRI).

China is certainly a primary market for Mercosur 4. As such, Uruguay declared its interest in negotiating a free-trade agreement (FTA) with China, but, at the moment, the initiative does not have the backing of the other members of the bloc, particularly Argentina, as they believe it would be a breach of the commitments taken on multilaterally in the Treaty of Asunción.

### 3.3. The Mercosur-EU agreement

Against a backdrop of global agri-food disruptions and given the importance of upholding the principle of intra-EU food security in the face of the Russia-Ukraine conflict the signing of a Mercosur-EU agreement to create a free trade area has gained new traction. First conceived in 1999 after a meeting of EU heads of state or government and Mercosur held in Rio de Janeiro, the agreement has been under negotiation for two decades, with an initial “political” deal

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struck in early 2019. The main points negotiated under the agreement include the EU liberalising 99% of its agricultural trade with Mercosur, while the Mercosur economies would remove 88% of their tariffs. The agreement also provides for the bloc opening up to imports of industrial goods, cars, telecommunications, insurance and financial services provided by EU companies (Argentine government, 2019).

The 500 million inhabitants of the EU certainly comprise a prime market for the Mercosur bloc and the EU economies are also an important source of FDI. Brazil is the EU's main trade partner, and the EU is the biggest foreign investor in Mercosur. Brazil is also the main destination of FDI placed by European firms in the region, and the fourth-biggest outside the EU. It is a similar picture in Argentina, where European FDI is in first place. For the EU, the FTA would ensure greater access to a food-supplying production area (ECLAC, 2023), allowing it to diversify supply risks caused by a war in Ukraine with no clear end in sight (Ghiotto, L and Echaide, J., 2019). The European economies' imports from Mercosur 4 include meat, sugar cane ethanol, soybeans, soy flour and fish products, and they have few options as far as expanding their border devoted to agriculture is concerned. Spain is the second-biggest destination of agri-food products shipped from Mercosur, accounting for 21.4% of sales to the EU.

Yet, despite these apparent mutual benefits, there are major obstacles to signing the agreement. Prominent among them is European resistance to endorsing the deforestation of the Amazon through a trade deal, as well as the incorporation of additional environmental protocols on the part of the EU that would affect the entry of agricultural products from the bloc. In addition to these restrictions, there are subsidy increases for European producers thanks to political determinants and the current policy of the European Green Deal, which seeks to reduce the use of pesticides by 50%, the use of fertilisers by 20% and devote 25% of the agricultural land to agroecology by 2030. These conditions are considered impositions that clash with the systems of production of the Mercosur 4 economies (Mira, 2022).

### 3.4. Brazil the driving force

Brazil is the region's biggest exporter and the main driver of agri-food export growth in Mercosur 4. The factors powering Brazil's transformation into an efficient food producer include sustained public-private investment, gains in arable land (particularly in the southeastern states), the incorporation of technology into different crops and greater global demand for food (*Clarín*, 2023).

Brazilian exports came to \$53.7bn in 2022 (up 19.1%). The main driver was the increase in international prices. The soybean industry accounted for \$13bn; corn (exports of which nearly tripled) provided \$8.1bn, and beef represented \$3.8bn (ECLAC, 2023). Brazil, then, has become the United States' main competitor in the global corn market, and even in the meat market. United States Department of Agriculture (USDA) projections for 2031 indicate that red meat and poultry production is set to increase from 61m tonnes in 2021 to 70m by that year (USDA, 2023). As a global agro-exporter, Brazil stood in sixth place 40 years ago; today it takes third place in the global ranking (*Infobae*, 2023).

### 3.5. “Junior partners” count

Uruguay’s natural resource endowment affords it comparative advantages in the production of food. With over 90% of its land suitable for agricultural activity (16.5m hectares), the sector accounts for between 6% and 7% of GDP. During the 2021-2022 crop season, the total cultivated area increased by 14% year-on-year, driven primarily by soybeans, and the expansion of barley, rice and corn. The agribusiness sector plays a significant part in the country’s export mix. Its share of the global market puts it in seventh place in sales of rice, tenth in barley and sixth in soybeans (Uruguay XXI, 2022).

Paraguay is remarkable because of its rapid transformation into a competitive agro-exporting economy. According to the World Bank, “during the last two decades, Paraguay has experienced robust economic growth thanks to favourable terms of trade that have led to improvements in the prices of the country’s exported products and solid macroeconomic policies, including institutional reforms such as the inflation targeting mechanism and fiscal responsibility legislation” (World Bank, 2023).

Beef and soybeans account for nearly 70% of its exports and a third of its GDP, and the country is the world’s fourth largest soybean producer. In order to boost its export drive, certain logistics projects are looking to interconnect its domestic routes with the Bi-oceanic Road Corridor that is set to link Brazil, Bolivia, Paraguay and Argentina. The purpose of the corridor is to connect Brazilian soybean producers and Paraguayan farmers with Asian markets, crossing northern Argentina to the ports of northern Chile, providing a gateway to the Pacific, or the Atlantic, rather like the Panama Canal (Manrique, L., 2022).

According to the president of Paraguay, Santiago Peña, while it maintains diplomatic relations with Taiwan, on a trade level the country has “no restrictions” with China, which is its “main trading partner” and “one of the chief destinations of Paraguayan exports, primarily soybeans” (Infobae, 2023).

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## 4. Mercosur 4: global responsibility, internal food security and policy coordination

Projecting the principle of intra-bloc food security correlates with the commitment undertaken by the bloc as a productive ecosystem with high levels of sectoral integration in the area of agriculture. For the Mercosur 4 economies, food and nutritional security provides order to strategies relating to national development, the organisation of production, job creation, the contributions the agricultural sector makes to local development, sustainable development, technology diffusion, biotech innovation, the internationalisation of farming SMEs, and industrial development by creating intra- and extra-bloc production chains.

For Brazil, for example, the importance of the principle of food security lies in the need to eliminate exclusion and the concentration of wealth or minimise situations of social vulnerability because “the challenges are permanent, as hunger and poverty are structural problems that require long-term action” (IICA, 2021). For its part, the Tekoporã food

security programme in Paraguay, geared towards families facing poverty and vulnerability, “coordinates action with soup kitchens and one of our specific goals is to diversify family diets”. In Uruguay, the legal framework approved in 2014 “establishes preferences for family farmers and artisanal fishing in public purchases”, which “fosters the sustainable development agenda and favours local production circuits” (IICA, 2021b).

In line with the above, and with a view to increasing internal levels of coordination and taking concerted external action, for two decades the Mercosur 4 economies have created various consultation mechanisms on sectoral strategies and courses of action. One example is the Southern Agricultural Council (CAS), a ministerial forum for consultation and coordinating regional action comprising the ministers and secretaries of agriculture of the member states. Its chief goal is to set priorities on the farming agenda and adopt common positions on matters of regional interest. The mechanism includes other associated states such as Chile.

The regular meetings of the CAS serve to organise and coordinate action on production, logistics, customs issues and external negotiations, among other topics, and representatives from the public and private sectors take part. Meanwhile, in December 2022, the Ad Hoc Group on Trade and Sustainable Development (GAHCDS) was formed to address the challenges the green transition poses the Mercosur 4. These initiatives provide intra-bloc cohesion and predictability on common strategies and policies aimed at building trust among local and international operators.

## 5. Conclusions

The pandemic and the Russia-Ukraine war have caused disruptions in global food supply, raising international prices of agricultural commodities that had a direct effect on inflationary increases in both developed and developing economies. The confirmation of a cycle of production instability and restrictions on the world's supply of food revived debates over how to safeguard food security in the face of a breakdown in supply chains, fall in the global supply of food, trade restrictions and environmental degradation.

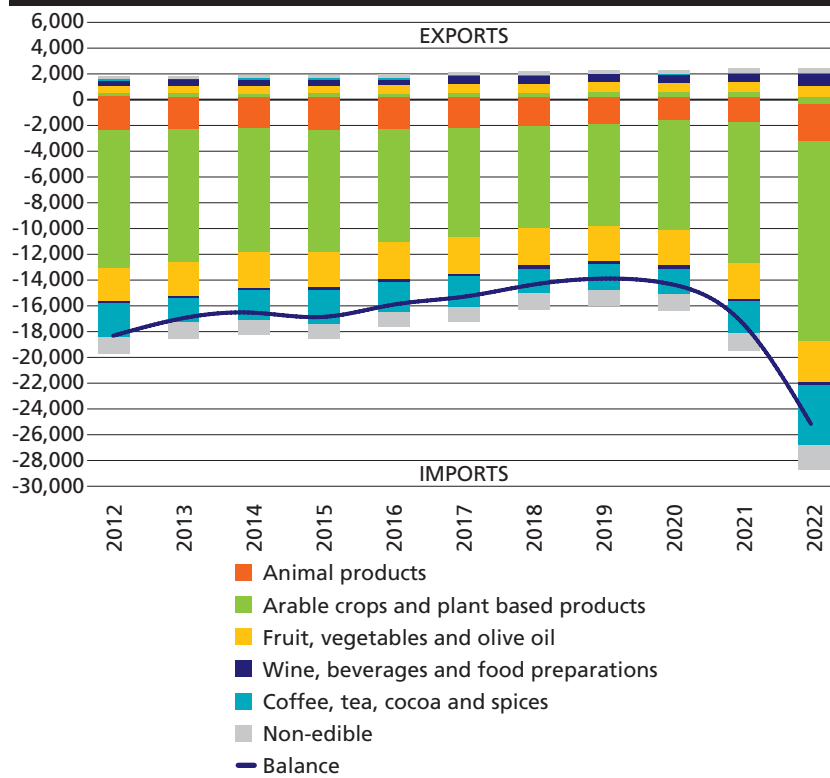
Given this general outlook, the producing economies of Mercosur 4 responded by maintaining strategies geared towards expanding production frontiers, investing in infrastructure and connectivity, introducing greater phytosanitary and veterinary checks and standardising quality-control and traceability procedures for agricultural products bound for export, particularly to the demanding markets of the EU and the Asia-Pacific, such as China.

In the current situation, and in order to minimise future risks, the EU's renewed interest in signing a free trade agreement and an anticipated cycle of increasing imports on the part of China and other rapidly developing economies of the Pacific and India, confirm the decisive role that the Mercosur 4 countries are playing as competitive and efficient agri-food producers.



## Appendix

Figure 2. Structure of EU agri-food trade with Mercosur 4, 2012-2022



Source: AGRI-FOOD TRADE STATISTICAL FACTSHEET, European Union - Mercosur 4 European Commission, Directorate General for Agriculture and Rural Development [https://agriculture.ec.europa.eu/system/files/2023-05/agrifood-mercotur-4\\_en.pdf](https://agriculture.ec.europa.eu/system/files/2023-05/agrifood-mercotur-4_en.pdf)

**Table 2. Evolution of EU agri-food imports from Mercosur 4, 2018 - 2022**

	Imports						
	Value Mio €					%	
	2018	2019	2020	2021	2022	Share in all Agri 2022	Change 2021-2022
<b>Agri-food:</b>	<b>16,429</b>	<b>16,051</b>	<b>16,491</b>	<b>19,577</b>	<b>28,240</b>	<b>100.0</b>	<b>44.3</b>
<b>Animal products</b>	<b>2,120</b>	<b>1,995</b>	<b>1,711</b>	<b>1,851</b>	<b>2,721</b>	<b>9.6</b>	<b>47.0</b>
Beef and veal	1,223	1,166	967	1,065	1,480	5.2	39.0
Pigmeat	0	0	0	0	0	0.0	
Poultry and eggs	479	435	360	397	712	2.6	79.3
Sheep and goat	9	8	8	5	15	0.1	200.0
Dairy products	0	0	0	0	0	0.0	
Other animal products	407	386	375	383	513	1.8	33.9
<b>Arable crops and plant based products</b>	<b>7,950</b>	<b>7,933</b>	<b>8,447</b>	<b>10,911</b>	<b>15,560</b>	<b>55.1</b>	<b>42.6</b>
Cereals	833	898	764	825	2,615	9.3	217.0
Cereal preparations and milling products	13	17	28	19	27	0.1	42.1
Oilseeds and protein crops	6,865	6,720	7,396	9,654	12,173	43.1	26.1
Vegetable oils (oilseeds and palm)	87	106	67	142	211	0.7	48.6
Margarine and other oils and fats (vegetable)	42	41	46	64	88	0.3	37.5
Sugar and isoglucose	109	151	147	207	446	1.6	115.5
<b>Fruit, vegetables and olive oil</b>	<b>2,881</b>	<b>2,720</b>	<b>2,806</b>	<b>2,760</b>	<b>3,132</b>	<b>11.1</b>	<b>13.5</b>
Vegetables	130	137	171	168	205	0.7	22.0
Fruit and nuts	1,484	1,391	1,520	1,571	1,754	6.2	11.6
Preparations of fruits, nuts and vegetables	1,235	1,175	1,088	990	1,158	4.1	17.0
Olives and olive oil	32	19	27	30	15	0.1	-50.0
<b>Wine, beverages and food preparations</b>	<b>237</b>	<b>225</b>	<b>225</b>	<b>235</b>	<b>319</b>	<b>1.1</b>	<b>35.7</b>
Wine and wine based products	118	108	124	112	130	0.5	16.1
Spirits and liqueurs	17	11	13	14	31	0.1	121.4
Beer, cider and other beverages	1	1	1	2	2	0.0	0.0
Confectionery and chocolate	7	6	5	5	8	0.0	60.0
Mixed food preparations and ingredients	93	99	82	102	147	0.5	44.1
<b>Coffee, tea, cocoa and spices</b>	<b>1,964</b>	<b>2,002</b>	<b>2,040</b>	<b>2,532</b>	<b>4,555</b>	<b>16.1</b>	<b>79.9</b>
Coffee, tea, cocoa and spices	1,964	2,002	2,040	2,532	4,555	16.1	79.9
<b>Nonedible</b>	<b>1,278</b>	<b>1,175</b>	<b>1,262</b>	<b>1,288</b>	<b>1,952</b>	<b>6.9</b>	<b>51.6</b>
Pet food and forage crops	286	253	246	266	371	1.3	39.5
Tobacco, cigars and cigarettes	580	601	538	547	634	2.2	15.9
Horticulture	10	9	12	10	9	0.0	-10.0
Nonedible for technical use	402	312	466	466	938	3.3	101.3
Unspecified					0	0.0	

Source: AGRI-FOOD TRADE STATISTICAL FACTSHEET, European Union - Mercosur 4 European Commission, Directorate General for Agriculture and Rural Development [https://agriculture.ec.europa.eu/system/files/2023-05/agrifood-mercotur-4\\_en.pdf](https://agriculture.ec.europa.eu/system/files/2023-05/agrifood-mercotur-4_en.pdf),

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