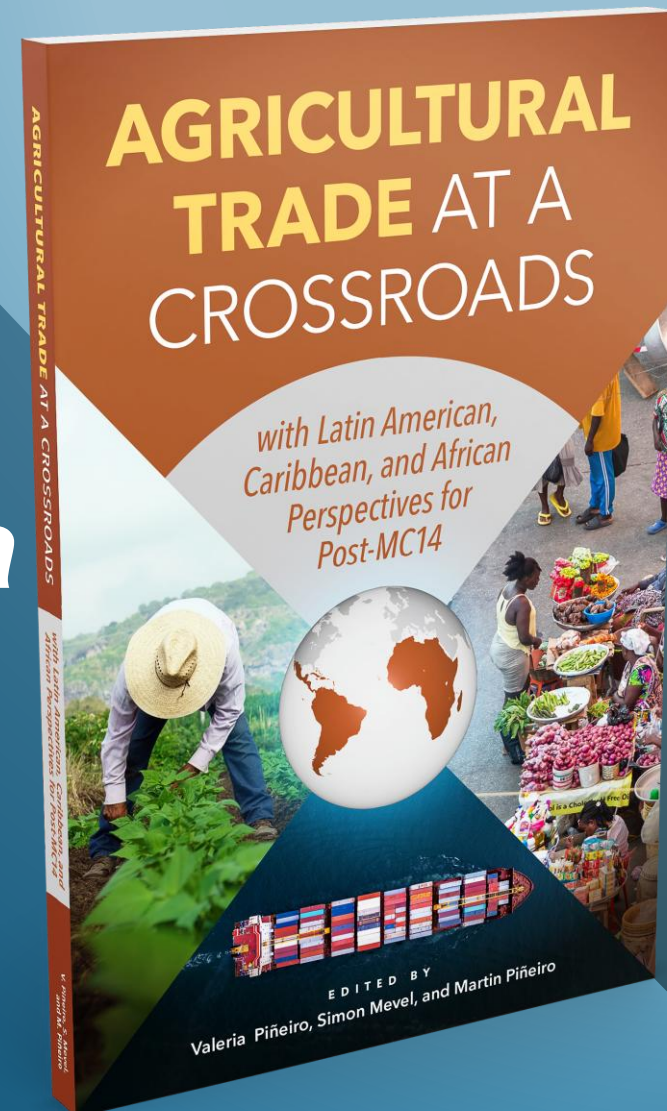


Agricultural Trade at a Crossroads with a Latin America, Caribbean and Africa Perspective

Book Launch

June 30th, 2026



Section I

The Changing Geopolitical Landscape and the WTO

Geopolitical Changes and the New Agricultural Trade Environment



Martin Piñeiro



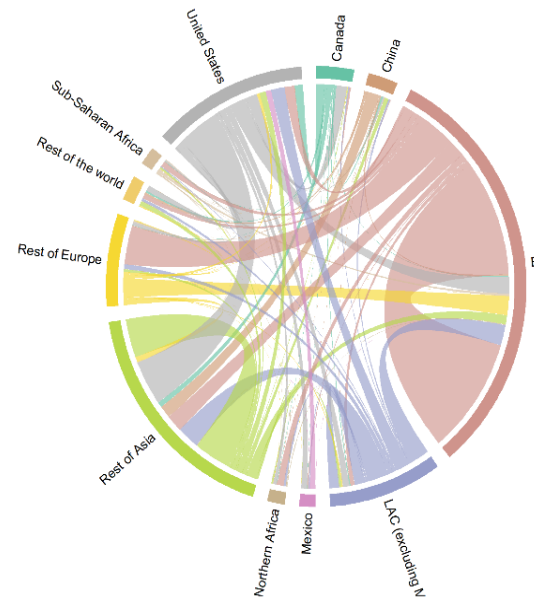
**Valeria
Piñeiro**



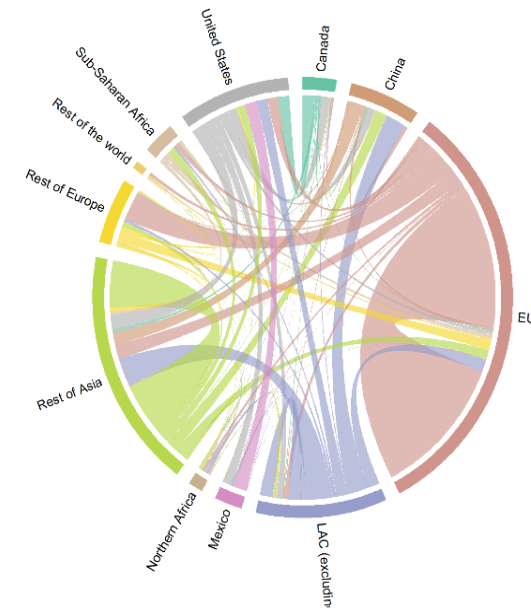
**Mauricio
Mesquita Moreira**

Agrifood Export Trade Flows. In current USD, 1990 and 2024.

1990 Agrifood Export Trade Flows



2024 Agrifood Export Trade Flows



Notes: Fisheries are not included in agrifood products.

Source: Author's calculations based on FAOSTAT data.

The shifting geopolitical landscape of agricultural trade is deepening global asymmetries. Leveraging regional frameworks, such as the AfCFTA in Africa and Southern Cone integration in LAC, is now a strategic imperative, not an option. Resilience against global volatility must be built from within.

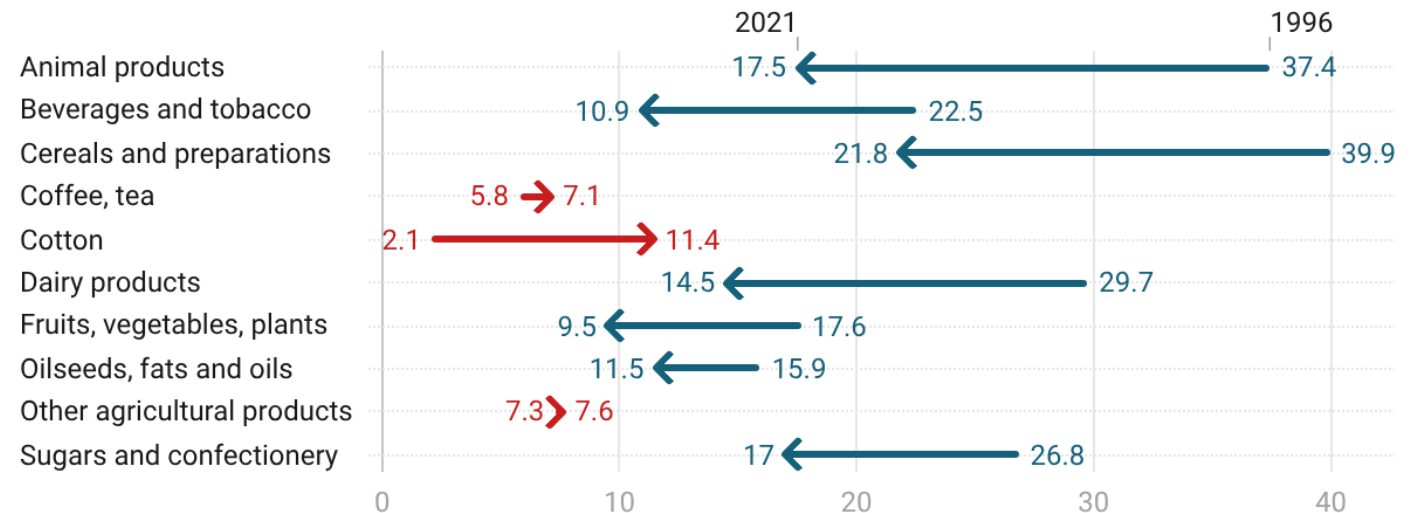
The WTO Today and Tomorrow: Revisiting Core Issues in Agriculture



Joseph Glauber

Change in applied MFN tariff rates between 1996 and 2021

Ad valorem equivalent (%)



Source: Monia Snoussi-Mimouni and Edvinas Drevinskas (2023) "Tariffs applied by WTO members have almost halved since 1996" WTO Trade Blog 13 April 2023 https://www.wto.org/english/blogs_e/data_blog_e/blog_dta_13apr23_e.htm

Agricultural trade has grown despite the WTO, not because of it (unilateral reforms and regional agreements). The easy wins are gone; what remains are the hardest, most contested issues. With the risk of backsliding now real, keeping the multilateral system functional is itself a strategic achievement.

Scenarios for Agricultural Trade in a Changing World



**Juan Pablo
Gianatiempo**



Valeria Piñeiro



David Laborde

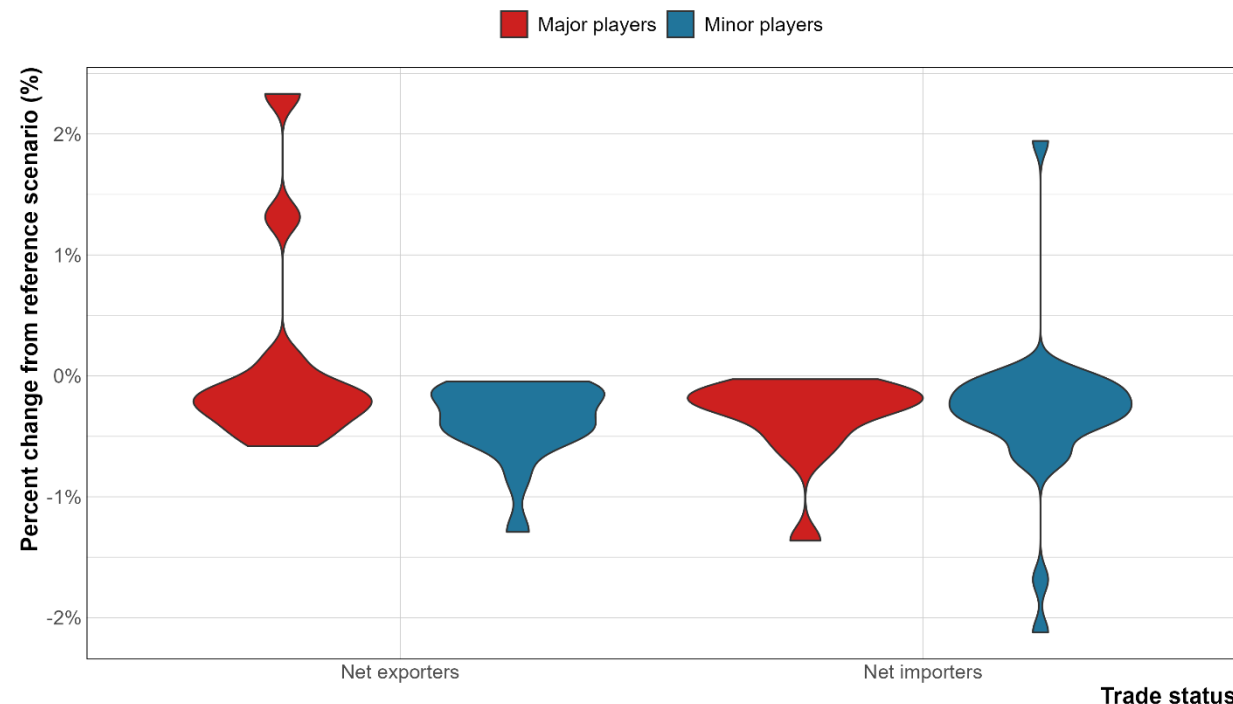


Jorge Rueda



Joseph Glauber

Distribution of impacts on welfare by country trade status and size of trade category, with changes relative to the reference scenario



Source: Author's calculations based on MIRAGRODEP model simulations

Trade fragmentation carries real costs, creating regional winners and losers with no guarantee that reallocations offset aggregate losses. The shift toward a more MFN-oriented tariff approach changes the form, not the reality: agricultural trade still faces reduced predictability and greater uncertainty.

Section II

Latin America and the Caribbean: Regional Perspective

Agricultural Trade Structure, Disruptions, and Competitiveness in Latin America and the Caribbean

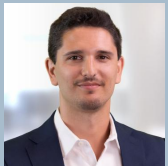
Share of total agricultural production by food group, LAC, 2020–2024 Average.



Jorge Rueda



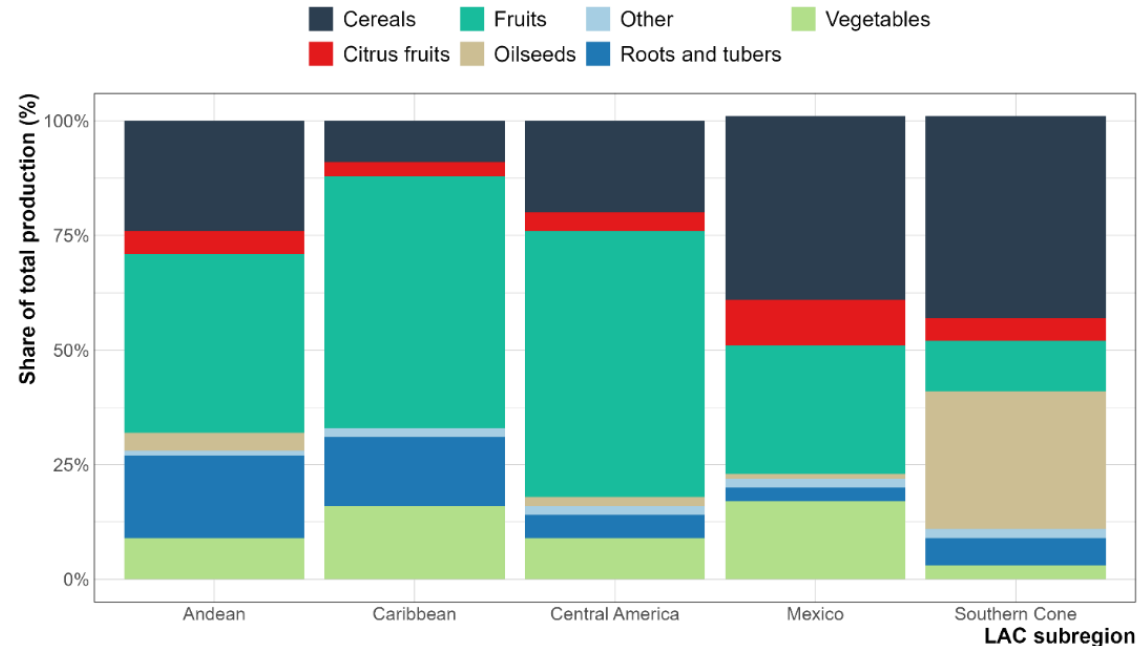
Valeria
Piñeiro



Juan Pablo
Gianatiempo



Mauricio
Moreira



Source: Author's computation based on FAOSTAT 2026.

LAC's agricultural sector is characterized by concentrated exports, slowing productivity growth, and strategic import dependencies, which amplify the region's exposure to external shocks. Their impact, however, is uneven: where productivity is low and diversification limited, the cost of adjustment is higher and resilience harder to build.

Innovating for Competitiveness and Sustainability



Pablo Elverdin



Sabine Papendieck



Federico Villarreal

Market access & competitiveness

Sustainability now shapes trade regulations, traceability and due diligence requirements across global value chains.

Risk of unilateral action

Without cooperation, unilateral measures risk fragmentation, protectionism, and exclusion of small producers.

Innovation redefined

Beyond technology: building institutional & informational infrastructures as global public goods.

LAC strategic opportunity

Preparations for the upcoming MC14 call for LAC to lead a deliberative process of learning and convergence, not merely adapt to externally defined standards, but actively shape emerging trade-environmental governance.

Key levers: interoperable traceability systems · harmonized sustainability metrics · integration of small farmers

Integrating sustainability through equivalence-based cooperation offers a way to align environmental effectiveness, competitiveness, and inclusive development, positioning sustainability as the new frontier of competitiveness in the global agri-food economy.

LAC's Role in Global Food Security and the Multilateral System

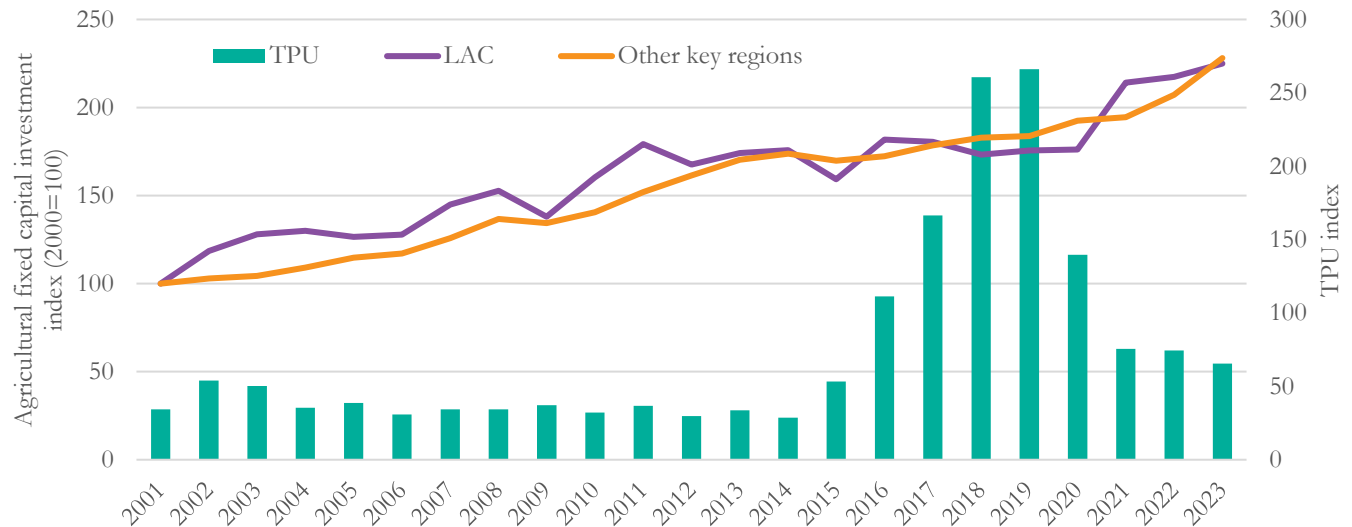


Nelson Illescas



Jimena Vicentin

Agricultural investment dynamics and trade policy uncertainty.



Notes: LAC and Other key region Agricultural Fixed capital investment are shown as indexes (2000=100). The Trade Policy Uncertainty (TPU) index is shown on the right-hand axis and scaled so that 100 indicates that 1% of news articles reference trade policy uncertainty. For more methodological details see Caldara, Matteo Iacoviello, Molligo and Andrea (2019).

Source: Authors' calculations based on WTO data and Caldara, Matteo Iacoviello, Molligo and Andrea (2019) from FED.

Food security offers a pathway for WTO reform by aligning trade, development, and resilience objectives, while LAC can strengthen its role through resilient production systems and active engagement in a rules-based multilateral system.

Section III

Africa: Regional Perspective

Africa's Agricultural Trade Performance and Structural Barriers

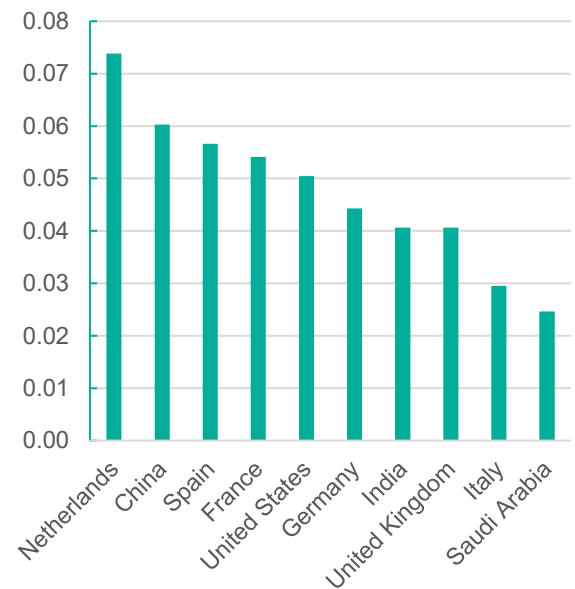


Moukaila Takpara



Fousseini Traore

Top 10 Africa partners (2019-2023 average)



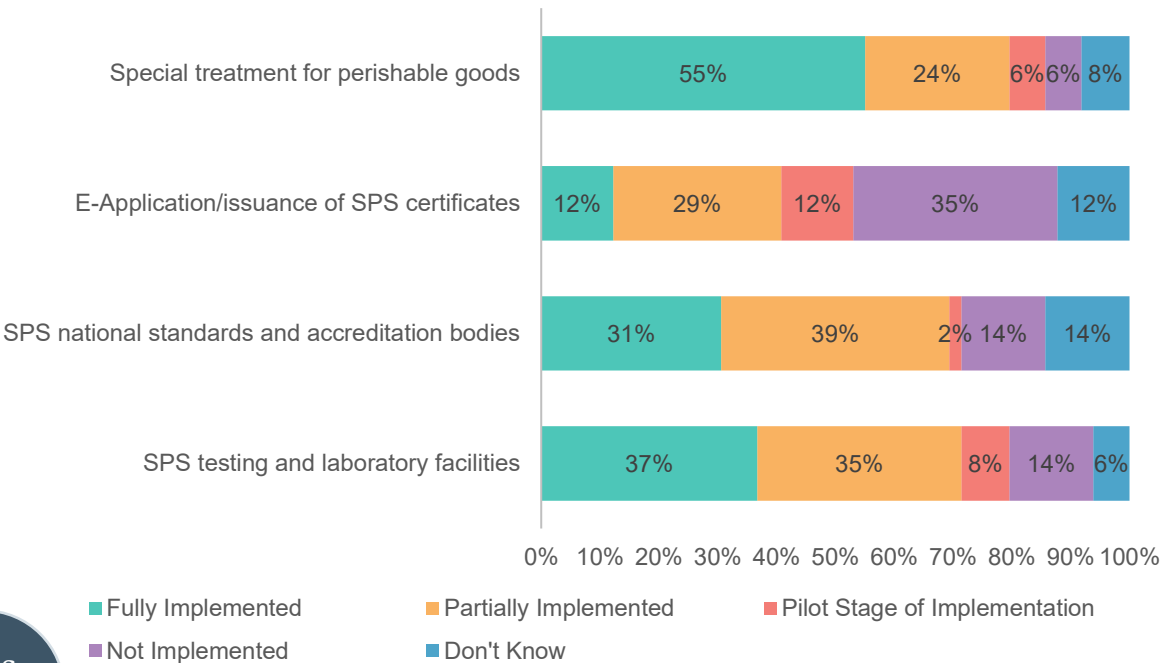
Source: COMTRADE and authors computation

Africa's agricultural trade remains structurally fragile and highly exposed to global shocks due to :

- high export concentration,
- weak productive capacity, and
- persistent trade facilitation gaps,

While intra-African trade, despite its significant potential, remains largely untapped.

State of Africa's implementation of agricultural trade facilitation measures in 2025



Source: authors' computation based on UNTF Survey on Digital and Sustainable Trade Facilitation (2025)

A coordinated agenda that boosts productivity, promotes export diversification, and strengthens trade facilitation anchored in the AfCFTA is essential to enhance competitiveness, build resilience, deepen regional integration, and ensure that no one is left behind.

Africa's Key Issues in WTO Negotiations Beyond MC14

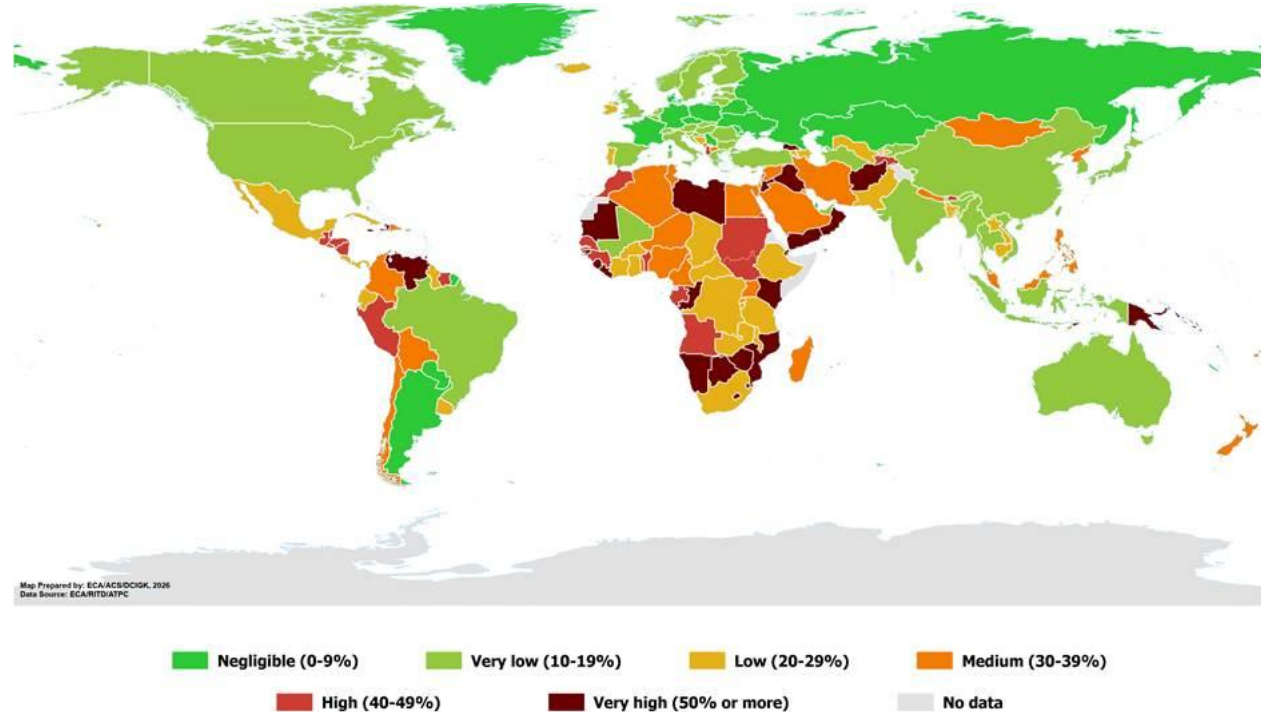


Ogwuche Sunday



Nelly Rita Muriuki

Food Import Vulnerability Index (all 15 staple foods)

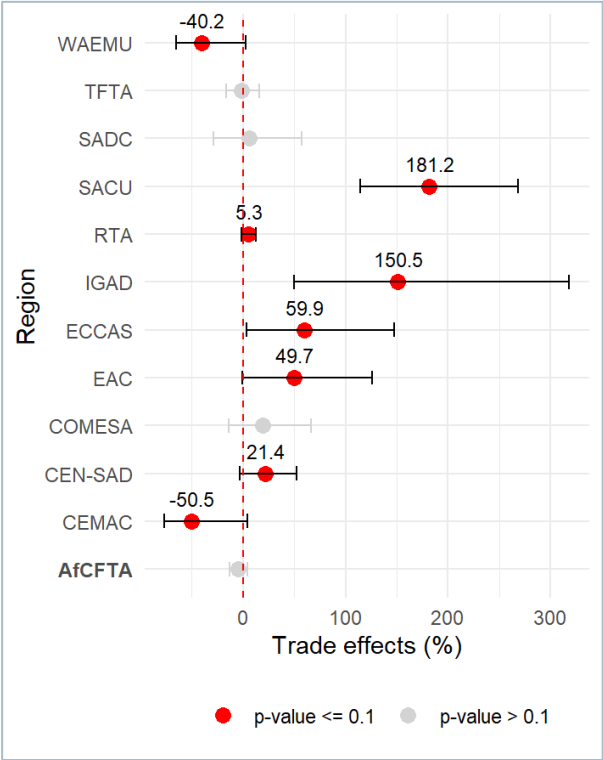


Source: Minot, N., Vos, R., Park, B., Kim, S., Zaki, S., & Mamoundou, P. (2023). *Vulnerability to Global Market Shocks V.2: Price Shocks to Major Staple Foods*. Food Security Portal.

Africa's agricultural transformation requires a level playing field, adequate policy space, proportional influence, and room to tackle food insecurity. At MC-15, the African Group seeks to protect what has been achieved and advance on PSH, SSM, and cotton.

Regional Integration, Resilience, and Innovation

Agriculture Trade effects by regions, 1995-2024



Regional Interaction Effects of the Legal Enforceability of Trade Agreement Provisions in agriculture

	Agriculture			Trade effects
	Estimate	Stderr	Stars	
WAEMU	✓ 1.86	0.59 ***	✓	198.16
EAC	✗ -2.08	1.23 *	✓	2.15
ECCAS	✓ 0.94	0.51 *	✓	82.37
SACU	✓ 0.91	0.13 ****	✓	90.73
WAEMU x Institution	✗ -22.78	6.11 ****		
EAC x Production	✗ -9.31	4.46 **		
ECCAS x Production	✗ -5.92	2.82 **		
SACU x Production	✓ 2.47	1.46 *		
WAEMU x Cooperation	✓ 2.30	1.36 *		
COMESA x Cooperation	✗ -1.48	0.68 **		
EAC x Other	✗ -41.79	6.78 ****		
SADC x Other	✓ 31.94	5.50 ****		
RTA x NTMS	✓ 7.35	1.31 ****		

Source: Author's estimations.

Note: * p<0.10; ** p<.05; *** p<.01; **** p<0.001. Only coefficients of statistically significant interaction terms are reported. Institution = "Institutions and Regulatory Frameworks" WTO-X area. Production = "Production Process and Economic Policies" WTO-X area. Cooperation= "Cooperation and Institutional Support" WTO-X area. Other= "Other Policy Areas". NTMs= "Nontariff measures" WTO-plus area.



Leysa Maty SALL



Mahlet Girma



Victoria Havsteen Branner

Trade gains are strongest where regional agreements are effectively implemented and supported by complementary policies. AfCFTA can be transformative if accompanied by effective implementation, is matched by trade facilitation, stronger regional value chains, and investments in productive, digital, and climate-smart capacities.

Governance determines whether regional integration translates into trade and development outcomes. Regulatory cooperation, standards harmonization and trade facilitation, institutional coordination prove stronger agricultural trade outcomes.

Section IV

Closing Dialogue: Building a Post-MC14 Agenda for
Agricultural Trade