Rest of Central and South America

Author: Andrea C. Sanchez Bogado (Alliance Bioversity International – CIAT).

The countries in the "Rest of Central and South America" region are Bahamas, Belize, Bolivia (Plurinational State of), Chile, Costa Rica, Cuba, Dominican Republic, Ecuador, El Salvador, Guatemala, Guyana, Haiti, Honduras, Jamaica, Nicaragua, Panama, Paraguay, Peru, Suriname, Trinidad and Tobago, Uruguay, Venezuela (Bolivarian Republic of).

Pathway Assumptions

		A) CURRENT TRENDS	B) NATIONAL COMMITMENTS	C) GLOBAL SUSTAINABILITY	JUSTIFICATION (CURRENT TRENDS)	JUSTIFICATION (NATIONAL COMMITMENTS)	JUSTIFICATION (GLOBAL SUSTAINABILITY)
	General description	**We do not act differently than in the past decade / today**	**National actions/policies are aligned with national commitments**	**National actions/policies are aligned with global sustainability targets**			
1. Macroeconomics	**1.1)** GDP per capita	SSP3: 1.6% growth per year to 2032	SSP3: 1.6% growth per year to 2032	SSP1: GDP >5% per year to 2030	In the medium term, per capita GDP is expected to rise by 1.6% per annum, to approach USD 10,500 per capita by 2032. This is only 6% higher than in 2014 and remains 21% below the global average of USD 13 342. Source: OECD-FAO Agricultural Outlook 2023-2032. OECD/FAO 2023	There is no strategy to increase GDP at the regional level. Same as the current trend.	Annual per capita GDP growth of 5% up to 2030 and a yearly reduction of 1.5% in the Gini coefficient (in this case as of 2021) would only reduce extreme poverty to 5.7%, which would miss the target established under SDG 1 (ECLAC. 2020. The 2030 Agenda for Sustainable Development in the new global and regional context Scenarios and projections in the current crisis.
	1.2) Population	SSP1: 0.7 per year by 2031	SSP1: 0.7 per year by 2031	SSP1	The Latin America and Caribbean region are home to about 8.5% of the global population, growing at 0.7% per annum by 2031	There is no strategy to increase population at the regional level. Same as the current trend.	

					Source: OECD-FAO AGRICULTURAL OUTLOOK 2022-2031. OECD/FAO 2022		
	1.3) Inflation	Current	Current	Average	In June 2022, 12-month inflation in the economies of Latin America and the Caribbean stood at 8.4% as a regional average; and, while it has since eased, average inflation was still 6.5% in late 2022 —3.6 percentage points above the December 2019 level. The slacker pace of inflation since June 2002 suggests that the worst is over. However, inflation rates in most of the region's economies remain well above pre-pandemic levels; and their future trends remain highly dependent on the behavior of food and energy prices on international markets. Moreover, the heavy fiscal burden of food and energy subsidy programs in several of the region's countries makes it unlikely that these programs can be sustained for much longer, which could herald a resurgence in inflation. Source: Economic Commission for Latin America and the Caribbean (ECLAC), Halfway to 2030 in Latin America and the	There is no strategy to reduce inflation at the regional level. Same as the current trend.	Policymakers in the region should continue to use the full range of instruments at their disposal to ensure macro-financial stability and avoid an excessive focus on certain variables, such as interest rates. The monetary authorities should also strengthen coordination with other policy areas, in particular fiscal policy, so that measures aimed at reducing inflationary pressures and exchange rate volatility do not narrow the fiscal policy space further by increasing financing costs. The monetary and fiscal authorities need to coordinate their efforts to ensure that anti-inflationary policies do not crowd out financing for investment, especially in activities such as agriculture and agribusiness, where product prices have surged, and also in higher productivity activities that make it possible to create quality jobs. Source: Economic Commission for Latin America and the Caribbean (ECLAC), Halfway to 2030 in Latin America and the

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					Caribbean: progress and recommendations for acceleration (LC/FDS.6/3/Rev.1), Santiago, 2023		Caribbean: progress and recommendations for acceleration (LC/FDS.6/3/Rev.1), Santiago, 2023
	1.4) Inequalities				1.5% reduction in the Gini coefficient and 3% growth in GDP per capita will reduce poverty to 8.4 by 2030 Source: Economic Commission for Latin America and the Caribbean (ECLAC), The 2030 Agenda for Sustainable Development in the new global and regional context: scenarios and projections in the current crisis (LC/PUB.2020/5), Santiago, 2020. The disruptions of the past three years reversed years of progress in reducing poverty and hunger in the region. During the subsequent period of rising food prices, the prevalence of under-nourishment increased further and in 2021, reached levels last seen in 2006. In 2022, the persistently high global food prices, which were exacerbated by Russia's war against Ukraine, combined with high general inflation, left little room for improvements in affordability and consequently food security, particularly in a region where the cost of healthy eating is the	End poverty in all its forms everywhere by 2025 (Food and nutrition security and the eradication of hunger CELAC 2025)	End poverty in all its forms everywhere by 2030

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					highest of those covered in this chapter (FAO, IFAD, PAHO, UNICEF and WFP, 2023) Source: OECD-FAO Agricultural OutlOOK 2023-2032. OECD/FAO 2023		
2. Land	**2.1)** Constraints on agricultural expansion / deforestation	FreeExpansion	NoExpansion	NoDefor2030	The agriculture bias in the region's export structure is increasing, at the expense of forest ecosystems. Bárcena et al. Quadrennial report on regional progress and challenges in relation to the 2030 Agenda for Sustainable Development in Latin America and the Caribbean.	EU Deforestation-free Regulation. To respond to market forces for reduced-emission agricultural products, new WBG support for deforestation-free, low-carbon agricultural value chains and associated certification systems is a priority in Brazil, Colombia, Paraguay, Peru, and Uruguay, which are among the countries likely to be most affected by the proposed EU regulation on deforestation-free agricultural products. Under the proposed EU regulation, operator companies are obligated to conduct due diligence to ensure only deforestation-free products are allowed into the EU market. Companies must show that commodities were not produced on any land deforested or degraded after 31 December 2020. Commodities must also have been produced legally. The regulation applies to cocoa and chocolate, coffee, soy, palm oil, cattle and beef, wood and	By 2020, promote the implementation of sustainable management of all types of forests, halt deforestation, restore degraded forests and substantially increase afforestation and reforestation globally (SDGs 2030)

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						rubber (World Bank Group. A Roadmap for Climate Action in Latin America and the Caribbean 2021-2025) Source: EUDR – EU Deforestation-free Regulation	
	2.2) Afforestation, and forest plantations targets	NoAffor	BonnChallenge	BonnChallenge	In the region, ecosystems are deteriorating, and biodiversity is declining at alarming rates, contrary to Goal 15 (Protect, restore and promote sustainable use of terrestrial ecosystems, sustainably manage forests, combat desertification, and halt and reverse land degradation and halt biodiversity loss). Between 1990 and 2020, 150 million hectares of natural woodland were lost in Latin America and the Caribbean, and the area of man-made forest doubled. In total, forest cover shrank by 7% (ECLAC, 2020g). The loss of tropical and subtropical forests has a major impact on the biodiversity and hydrology on which economic systems depend on. Economic Commission for Latin America and the Caribbean (ECLAC), Building Forward Better: action to strengthen the 2030 Agenda for Sustainable	BonnChallenge and 20X20 initiative: Protect and restore 5,000,000 hectares by 2020 and 7,500,000 hectares of natural habitats by 2030 (Belize, Bolivia, Chile, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Nicaragua, Panama, Peru, Uruguay). Latin American and Caribbean Forestry Commission - restoration of forests and other ecosystems Initiative20x20 Bonn Challenge	BonnChallenge and 20X20 initiative: Protect and restore 35 million hectares by 2020, and 50 million hectares of forest farms, pasture, and other landscapes by 2030 Latin American and Caribbean Forestry Commission - restoration of forests and other ecosystems Initiative20x20 Bonn Challenge

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					Development (LC/FDS.4/3/Rev.1), Santiago, 2021.)		
	2.3) Urban and settlements area	SSP2	NoChange	NoChange	Cities of more than 5 million inhabitants, historically the main poles of development, have experienced relative stagnation in the past two decades. It is estimated that cities with fewer than 300,000 inhabitants (small) and 1 to 5 million inhabitants (medium-sized) will grow the most in the coming years (DESA, 2015) within the context of a continuous but low rate of urban population growth. The new urbanization phase in the region, characterized by a slowdown of urban population growth (Habitat III Regional Report Latin America and the Caribbean Sustainable Cities with Equality. 2017)	The region has set for itself the following goals: 3.5 Achieve a compact, connected, integrated, safe and inclusive urban form through urban and territorial planning and design tools and instruments. 3.5.4 Mechanisms that prevent urban expansion and require the incorporation of unurbanized land in a planned and connected way, considering the coherent distribution of land use and activities (Regional Action Plan for the implementation of the New Urban Agenda in Latin America and the Caribbean 2016-2036)	The region has set for itself the following goals: 3.5 Achieve a compact, connected, integrated, safe and inclusive urban form through urban and territorial planning and design tools and instruments. 3.5.4 Mechanisms that prevent urban expansion and require the incorporation of unurbanized land in a planned and connected way, considering the coherent distribution of land use and activities (Regional Action Plan for the implementation of the New Urban Agenda in Latin America and the Caribbean 2016-2036)
	2.4) Protected areas	NoChange	PAExpansion: 30%	PAExpansion: 30%	LAC has the highest biological diversity in the world. Forests and green corridors, such as the Mesoamerican Biological Corridor, play an essential role in carbon sequestration globally. However, deforestation, pollution, overexploitation and illegal trafficking of species, and urban sprawl and densification exert continued pressures on the	The region has set as a target 30% of terrestrial and marine areas are protected by 2030 (Lima declaration 2019)	The Global Biodiversity Framework target of the CBD aims to effectively conserve and manage 30% of the national territory including terrestrial, inland water, and coastal and marine areas by 2030.

					natural environment, causing habitat loss and fragmentation, and a degradation of ecosystem services. Biodiversity as measured by the Red List Index is declining at twice the rate observed across OECD countries. This in turn undermines the ability of ecosystems to provide a shield against growing climate-related risks and reduces their resilience to impacts of climate change. The region progressed in taking measures to protect its biodiversity and landscapes. In 2022, it had 24% of its land area and 21% of its Exclusive Economic Zones, designated as terrestrial and marine protected areas, respectively. Although many of these areas are designated under the least stringent protection objectives, the region as a whole achieved the 2020 Aichi targets. Further efforts are needed to reach the Global Biodiversity Framework target of the CBD to effectively conserve and manage 30% of the national territory including terrestrial, inland water, and coastal and marine areas by 2030 (OECD (2023),		

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					Environment at a Glance in Latin America and the Caribbean: Spotlight on Climate Change, OECD Publishing, Paris.		
3. Productivity and management	**3.1)** Crop productivity for the key crops	HighGrowth	HighGrowth	HighGrowth	Between 2020 and 2050, crop productivity increases: - soybean: from 2.90 t/ha to 3.48 t/ha = 20%; - wheat: from 3.49 t/ha to 4.34 t/ha = 24%; - rice: from 4.95 t/ha to 6.07 t/ha = 23%. Source: Food and agriculture projections to 2050 (BAU scenario) Productivity growth between 2000-2010: - soybean: 15% - wheat: 3% - rice: 13% Source: FAO stat	Between 2020 and 2050, crop productivity increases: - soybean: from 2.76 t/ha to 3.15 t/ha; - wheat: from 3.34 t/ha to 3.98 t/ha; - rice: from 4.78 t/ha to 5.64 t/ha Source: Food and agriculture projections to 2050 (BAU scenario) For major crops such as maize and soybeans, yields improved by 23% and 13%, respectively, over the past decade. This trend is expected to continue, with average yield gains of around 10% projected by 2031 for most major crop commodities. This enables continued improvement in the net value of crop production per hectare of land, which is already the second highest amongst the regions in this Outlook and set to rise by a further 1.2% p.a. over the coming decade. The region is an intensive user of fertiliser, second only to the Developed	By 2030 double the agricultural productivity (SDGs)

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						and East Asia region, and imports large quantities, suggesting that sharp increases in fertiliser costs, exacerbated by the war could potentially constrain yield growth and output in the short term. (OECD-FAO Agricultural Outlook 2022-2031)	
	3.2) Cropland under agroecological practices	Mixed: - organic: 1.1 %	- Mixed: - organic= 20%, - no/minimum tillage=10%, - Embedded natural=30%	- Mixed: - organic= 30%, - no/minimum tillage=10% - Embedded natural: 30%	1.1 percent of the total agricultural land in Latin America and the Caribbean is under organic production. FiBL & IFOAM – Organics International The World Of Organic Agriculture - statistics & emerging trends 2020	BonnChallenge: restore~7,600,000 hectares of degraded agricultural land by 2030 (Belize, Bolivia, Chile, Costa Rica, Ecuador, El Salvador, Guatemala, Honduras, Nicaragua, Panama, Peru, Uruguay). PERU: 20% increase in the share of certified organic crop area 2021-2030 Source: Decreto Supremo que aprueba el Plan Nacional Concertado para la Promoción y Fomento de la Producción Orgánica o Ecológica - PLANAE 2021-2030 URUGUAY: The National Plan for the Promotion of Production with Agroecological Bases promotes the implementation of agricultural systems such as ecological or organic agriculture, biodynamic agriculture,	SDG 2.4 By 2030, ensure sustainable food production systems and implement resilient agricultural practices that increase productivity and production, that help maintain 2.4.1 Proportion of agricultural area under productive and sustainable agriculture PAGE | 9 ecosystems, that strengthen capacity for adaptation to climate change, extreme weather, drought, flooding and other disasters and that progressively improve land and soil quality.

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						permaculture, agroforestry systems, integrated agricultural and livestock systems, rotations, cover crops, polycultures. Source: Plan Nacional Para el Fomento de la Producción con Bases Agroecológicas. LAC: 38% increament in the area under organic certification between 2020-2030 (fully transition) from 6.794.843 to 9.391.705 hectares (Argentina, Bolivia, Brazil, Ecuador, Guatemala, Honduras, Mexico and Paraguay) (Comision Interamericana de Agricultura Organica (CIAO). Plan Estratégico para el fomento y Control de la producción orgánica al 2030, en los países Miembros de la Comisión Interamericana de Agricultura Orgánica-Ciao.	
	3.3) Livestock productivity for the key livestock products	HighGrowth	HighGrowth	HighGrowth	Livestock production in the region is projected to expand by 28% from 2022-2021. Poultry production will account for more than 55% of growth in meat production by 2031, with bovine and pork production accounting for 29% and 16%, respectively. Despite short-term pressure in the early years of the outlook, meat-to-feed grain price ratios	Livestock production in the region is projected to expand by 28% from 2022-2021. Poultry production will account for more than 55% of growth in meat production by 2031, with bovine and pork production accounting for 29% and 16%, respectively. Despite short-term pressure in the early years of the outlook, meat-to-feed grain price ratios	Global agenda for sustainable livestock production Projected increases in animal protein demand and consumption are likely to maintain livestock's position as one of the fastest growing sub-sectors in agriculture for the foreseeable future, particularly in low-income and emerging

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					will be favorable over the medium term, boosting the expansion of poultry and pork production, both of which rely on intensive use of feed in production. Bovine meat expansion will result from productivity gains, increased carcass weights, and a 3% expansion of herd numbers by 2031 to yield growth of 10.8%. (OECD-FAO Agricultural Outlook 2022-2031)	will be favorable over the medium term, boosting the expansion of poultry and pork production, both of which rely on intensive use of feed in production. Bovine meat expansion will result from productivity gains, increased carcass weights, and a 3% expansion of herd numbers by 2031 to yield growth of 10.8%. (OECD-FAO Agricultural Outlook 2022-2031)	economies. But the following areas need attention: - Reducing waste and losses, including production, harvest, and processing losses. - Increase efficiency. * Enhance livelihoods and human well-being. - Protect resources. * Increase resilience. - Improve governance.
	3.4) Pasture stocking rate	HighGrowth	HighGrowth	HighGrowth	Animal numbers are predicted to grow in Latin America by 5% to 413 million head from 2019 to 2029. Source: OECD. Making Better Policies for Food Systems	There is no strategy to reduce pasture stoking rate at the regional level. Same as the current trend.	Higher livestock densities for cattle increases nitrogen balances; this is supported by recent empirical work undertaken by the OECD which found a 1% increase in cattle density resulted in a 0.3% increase in the nitrogen balance (OECD, 2019[61]). Source: OECD. Making Better Policies for Food Systems
	3.5) Forest management	-	-	-	-	-	-
4. Trade	**4.1)** Share of consumption which is imported for key imported products (%)	I1: increased imports for maize and wheat	I2: stable imports for maize and wheat	I2: stable imports for corn and wheat	With the exception of MERCOSUR countries, all other LAC countries are net importers of cereals, often sourced from within LAC. Agricultural and food imports in these countries will	The Caribbean countries Members of the Caribbean Community (CARICOM) are working to reduce their dependence on imports, with the goal of reducing them by 25	The Caribbean countries Members of the Caribbean Community (CARICOM) are working to reduce their dependence on imports, with the goal of reducing them by 25

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					continue to grow in the next decade. LAC wheat imports, for instance, are projected to increase by 3.5 Mt by 2028, and maize imports will increase by almost 7 Mt, reaching 40.3 Mt in 2028. Source: OECD Library : Chapter 2. Latin American Agriculture : Prospects and Challenges	percent by 2025, by giving special attention to priority crops and products such as poultry, corn, soya, meat (Goat, Sheep, Beef), rice and niche vegetables which are highly imported products in the region wheat, maize, and sunflower oil. Line of Action 2: Facilitating Intraregional Food Trade. Strengthen knowledge and create conditions for overcoming the obstacles and/or restrictions to intra-regional trade: tariffs (negotiation margins); non-tariff measures (exchange and harmonization of national rules to stimulate production, phytosanitary measures, food safety, technical standards, etc.) and operational measures (funding, infrastructure, transportation, logistics, private/public administration, etc.), so that the commercial exchanges between the states and the operators is fluid and facilitates the creation of trade flow (The CELAC plan for food and nutrition security and the eradication of hunger 2025)	percent by 2025, by giving special attention to priority crops and products such as poultry, corn, soya, meat (Goat, Sheep, Beef), rice and niche vegetables which are highly imported products in the region wheat, maize, and sunflower oil

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	4.2) Evolution of exports for key exported products (1000 tons)	E3	E2	E3	- Maize: 72688.17 thousand tons (in 2023) – 84297.1 thousand tons (in 2031). - Soybean: 103667.31 thousand tons (in 2023) - 109 208.47 thousand tons (in 2031). - Bovine meat: 5161.46 tons, carcass weight equivalent, thousands (in 2023) – 5658.33 tons carcass weight equivalent, thousands (in 2031) - Poultry meat: 4570.75 tons ready to cook, thousands (in 2023) – 5066.54 tons, ready to cook, thousands (in 2031). Source: OECD-FAO Agricultural Outlook 2022-2031	The region has become the largest exporter of agricultural commodities in the world and is expected to further reinforce this position in the coming decade. Source: OECD-FAO Agricultural Outlook 2019-2028	The agriculture bias in the region's export structure is increasing, at the expense of forest ecosystems. Modernizing agricultural and livestock production processes would increase production, generate income and create employment while limiting their environmental impacts
5. Food	**5.1)** Average dietary composition	FatDiet	FatDiet	EATLancetAverage	At present, the region exceeds the global average, with the FAO estimating a caloric supply of 3,069 calories per person per day in the 2014-2016 three-year period, or 15% more than in 1990-1992. Food grains were the main source of calories in the region in the 2009-2011 three-year period: 36% of the total caloric supply (Food and nutrition security and the eradication of hunger CELAC 2025).	The region is not on track to meet the 2025 target of the World Health Assembly to halt the rise in obesity Source: FAO, IFAD, PAHO, UNICEF and WFP. 2023. Regional Overview of Food Security and Nutrition – Latin America and the Caribbean 2022: towards improving affordability of healthy diets. Santiago. Most national food guidelines recommend reducing consumption of sugar, salt,	EAT–Lancet: By 2050, the average daily calorie consumption per capita is 2500 kcal and composed as: 811 kcal of whole grains, 39 kcal of tubers or starchy vegetables, 78 kcal of vegetables, 126 kcal of fruits, 153 kcal of dairy foods, 151 kcal of animal protein sources, 575 kcal of plant source protein, 450 of added fats, 120 added sugars.

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					By 2050, the average daily calorie consumption per capita is 3004 kcal (table 4.2 BAU - The future of food and agriculture – Alternative pathways to 2050) and composed as: 605 kcal animal product consumption (table 4.3 BAU - The future of food and agriculture – Alternative pathways to 2050); 158 kcal fruit and vegetables consumption (table 4.4 BAU - The future of food and agriculture – Alternative pathways to 2050; 38% cereals, roots and tubers (FAO STAT).	processed food, fried food; increase consumption of fruits, vegetables, pulses, include at least one portion of dairy products. An important point to highlight is that the guides usually use ambiguous terms such as “increase”, “moderate” or “decrease” the consumption of certain foods, without specifying quantities or portion sizes, which makes it difficult for the population to understand exactly the recommended amount and, therefore, put them into practice. Source: FAO El estado de las guías alimentarias basadas en alimentos en América Latina y el Caribe It is recommended that the Calorie intake includes between 10 and 15% of proteins, between 55 and 75% of carbohydrates and between 15 and 30% fat, and that the sugar intake does not exceed 10% of calories totals (América Latina y el Caribe Panorama de la seguridad alimentaria y nutricional)	

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	5.2) Share of food consumption which is wasted at household level	Current	Reduced	Reduced	Almost the same: 12.2 % of food loss in 2016, 14.52 % of food loss in 2021 (FAO stat). In Latin America, 34% of food for human consumption is lost or wasted: 13.4% of losses occur during production; 7.5% during post-harvest; 5% during preparation and packaging; 4.1% during distribution; and 3.7% at the point of consumption. (Food and nutrition security and the eradication of hunger CELAC 2025)	By 2030, halve per capita global food waste at the retail and consumer levels and reduce food losses along production and supply chains, including post-harvest losses (Food and nutrition security and the eradication of hunger CELAC 2025)	Sustainable Development Goal Target 12.3. SDG 12.3 aims to "by 2030, halve per capita global food waste at the retail and consumer levels and reduce food losses along production and supply chains, including post-harvest losses."
6. Biofuels	**6.1)** Targets on biofuel and/or other bioenergy use	NoChange	OECD_AGLINK	OECD_AGLINK	Geothermal energy, biofuels and coal are seen remaining about the same on average from 2016 to 2040. (Source: The energy path of Latin America and the Caribbean/ Rigoberto Ariel Yépez-García, Yi Ji, Michelle Hallack, David López Soto 2018)	With a starting point of 2019, achieve a regional target of at least 70% renewable energy penetration in Latin America and the Caribbean by 2030 (RELAC). Massive electrification of economic activities through the use of electric vehicles, electric boilers and heating systems for industrial and residential uses and, where this is not possible, replacing fossil fuels with carbon-free fuels such as hydrogen and sustainably produced biofuels. (De estructuras a servicios: el camino a una mejor infraestructura en América Latina y el Caribe. 2020)	OECD_AGLINK

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	6.2) Targets on other non-food use	-	-	-	-	-	-
7. Water	**7.1)** Irrigated crop area	7 % increment in irrigated crop land BY 2050	NoChange	NoChange	2.012: 20,701,608.61 ha of irrigated arable land; 2050: 25,385,451.23 of irrigated arable land (Business as usual FAO and agriculture 2050 data portal)	- Promote integrated water, soil and energy management and its relationship with ecosystems as heritage that feeds productive agricultural activities, energy generation and life in human settlements. Through watercourses, waste is returned to the nature. The integrated approach promotes common intersectoral goals reflected in policies, plans and projects which highlight that without water security there cannot be food security or food sovereignty. - Recover ancestral food production and water-use practices that are sustainable and aligned with nature-based solutions. (CEPAL Regional Water Action Agenda 2023 Latin America and the Caribbean).	SDG: 6.4 by 2030, substantially increase water-use efficiency across all sectors and ensure sustainable withdrawals and supply of freshwater to address water scarcity, and substantially reduce the number of people suffering from water scarcity