BRICS+ AGRI-SECTOR: Strategic Overview and Policy Recommendations

Hugo Jacques Kennedy[1]
Alberto Pfeifer[2]
Leandro Gilio[3]
Victor M. Cardoso[4]
Gabriela Mota Da Cruz[5]
Marcos S. Jank[6]

Executive Summary

As the world faces mounting food insecurity, climate disruptions, and growing geopolitical instability, the BRICS+ bloc has emerged as an indispensable actor in shaping the future of the global agrifood system. Representing over **42% of global agricultural land** (including partners) and producing nearly **half of the world's most-consumed grains and cereals**, BRICS+ countries hold strategic responsibility for ensuring food security at home and abroad.

Agricultural trade cooperation is essential and must be firmly integrated into the BRICS+ agenda. In 2024 alone, BRICS+ agribusiness trade reached **USD 882.8 billion**, nearly **one-fifth of global agrifood trade**. Yet, intra-bloc trade remains under-institutionalized, lacking formal agreements and comprehensive frameworks. Enhanced coordination, harmonized standards, and investment mobilization are crucial to unlock the bloc's full potential.

The **BRICS Agriculture Working Group (AWG)** has laid invaluable groundwork, fostering structured dialogue on sustainability, innovation, rural inclusion, and trade facilitation. Their work deserves strong praise as the foundation for deepened cooperation and action. This INSPER Agro Global working paper builds upon ideas and commitments repeatedly invoked in past BRICS dialogues and declarations, recognizing the urgent need to **move beyond discussion toward concrete, institutionalized implementation.** We strongly encourage BRICS+ leaders to adopt a **step-by-step, phased approach** to operationalize these proposals, ensuring they become enduring pillars of cooperation and sustainable development anchored in the BRICS framework.

Building on the groundwork laid by the BRICS Agriculture Working Group, this paper puts forward a set of concrete policy proposals for adoption at the 2025 BRICS Summit. These flagship initiatives span critical areas—from land restoration and trade digitalization to agri-infrastructure, risk insurance, and food security reserves—with the aim of transforming long-standing commitments into operational, institutional frameworks. Together, they form a practical roadmap to strengthen BRICS+ agrifood cooperation and global leadership.

[1] Researcher at Insper Agro Global
[2] Associate Researcher at Insper Agro Global
[3] Professor and researcher at INSPER Agro Global
[4] Researcher at Insper Agro Global
[5] Researcher at Insper Agro Global
[6] Senior Professor of Agribusiness and coordinator of Insper Agro Global. Member of the Board of Trustees at the Brazilian Center of International Relations (CEBRI).

BRICS+ Agrifood Policy Recommendations Summary

The BRICS+ agrifood agenda recommendations lay out eight interconnected policy frameworks designed to strengthen food security, agricultural sustainability, and trade cooperation across member states. These recommendations reflect a pragmatic roadmap for institutionalizing cooperation and addressing pressing food system challenges through innovation, investment, and strategic governance. It draws on the institutional work of the BRICS Agriculture Working Group (AWG), including the BRICS Agricultural Action Plan (2021–2024) and work from international organizations such as the UN, the FAO, ASEAN as well recent national innovations from Brazil.

1. Land Restoration Strategy
Objective: Restore degraded land to improve food security, rural livelihoods, and climate resilience.

2. Digital Trade Certification Roadmap
Objective: Modernize trade processes and eliminate inefficiencies in Agri-exports through digital solutions.

3. Food Import Financing Facility (FIFF)
Objective: Provide short-term food crisis financing and long-term support for domestic production and resilience.

4. Agri-Trade Infrastructure Platform
Objective: Address infrastructure gaps through private-sector engagement and market-based solutions.

5. Academic & Research Cooperation
Objective: Foster a new, climate-resilient BRICS Green Revolution through knowledge sharing.

6. Agroinsurance & Reinsurance Mechanism
Objective: Build risk resilience across BRICS agriculture through shared insurance frameworks.

7. BRICS Grain Exchange
Objective: Explore a common grain trading platform to enhance food sovereignty and price transparency.

8. BRICS Food Security Reserve
Objective: Create a coordinated food reserve to stabilize markets and respond to crises.

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Introduction

BRICS, the alliance of **Brazil, Russia, India, China, and South Africa** which has recently expanded in 2024 to include **Egypt, Ethiopia, Iran, Saudi Arabia** (invited but not confirmed), **the United Arab Emirates and Indonesia in the BRICS+ category**; as well as Belarus, Bolivia, Kazakhstan, Cuba, Malaysia, Thailand, Uganda, Uzbekistan, Nigeria and Vietnam as 'partner countries' — has become an increasingly influential actor in global affairs in its 15 years of existence. In the last couple of years in particular, the group has received greater political and public attention worldwide in an increasingly unstable geopolitical context marked by conflicts, trade wars and the erosion of multilateral norms. The group's 2024 expansion signaled yet again the group's desire to pursue its objectives of reshaping global governance and to increase its influence.

In the agri-food sector, BRICS+ countries are major agricultural powerhouses and critical to global food security supply chains. In 2024, BRICS+ accounted for approximately **19.5% of global trade volume across agricultural commodities**, with total trade in agricultural inputs reaching around **USD 1.1 trillion**. The bloc holds dominant shares in key commodity categories such as **grains**— including soybeans (63%), corn (20%), and wheat (23%)—underscoring its leading role in global agricultural exports and imports. This agri-food strength, with Brazil, India, Russia, China, and other members playing complementary roles as exporters and importers, underpins BRICS+'s growing geoeconomics and geopolitical influence. On top of the bloc's responsibility of feeding its large population - which constitutes more than **54,6% of world population** (BRICS+ and partners), the group is set to play an indispensable role in international Agri-trade to guarantee future food security in the more vulnerable regions of the Global South and for a world population which should reach 10 billion inhabitants by 2050.

As Brazil assumes the rotating presidency of BRICS for 2025, emphasizing a renewed commitment to sustainable development and multilateral cooperation among Global South nations and operating under the theme *"Strengthening Global South Cooperation for More Inclusive and Sustainable Governance,",* an Agrifood agenda appears not only to be a necessity but also an opportunity to provide a additional layer of strategic cooperation for the bloc that could help cement its cohesion and political agenda in the future.

In this working paper, INSPER Agro Global provides a short strategic overview of the BRICS+ Agri-food sector as well as policy-recommendations and orientations in light of the priorities set by the Brazilian presidency for this July 2025th's leader's summit in Rio de Janeiro.

1. Strategic Context: BRICS+ in a Multipolar World

1.1 From BRICS to BRICS+: geopolitics and institutional dynamics

BRICS has over the last few years—marked by increasing geopolitical instability and unpredictability—attracted renewed political and public attention. In particular, the arrival of new members and partner countries in 2024 and early 2025 has given the coalition new momentum—despite potential internal conflicts and tensions that could prevent the group's success. In 2024, the bloc welcomed Egypt, Ethiopia, Iran, and the United Arab Emirates (UAE) as new members. Subsequently, in January 2025, Indonesia joined as a full member, followed very recently by Vietnam on June 13, 2025, bringing the total to eleven. This enlargement signifies a strategic move to enhance South-South cooperation and reduce dependency on Western-centric institutions. Additionally, BRICS introduced a "partner country" status, extending invitations to nations such as Nigeria, Belarus, Bolivia, Cuba, Kazakhstan, Malaysia, Thailand, Uganda, and Uzbekistan. This expansion, often referred to as BRICS+, aims to enhance the bloc's representation of emerging economies across different continents, fostering greater economic cooperation and promoting a more multipolar world order.

Other countries that have openly expressed interest or have been linked to potential BRICS+ membership or partnership—including Argentina, Mexico, and Turkey—should not be forgotten, as their future inclusion could further diversify and strengthen the group. Their potential membership underscores BRICS' ongoing ambition to broaden its geopolitical and economic reach, while also highlighting the need to manage the complexities of an increasingly diverse coalition.

The expansion of BRICS to include Egypt, Ethiopia, Saudi Arabia, the UAE, Iran, and Vietnam reflects a strategic move to amplify the bloc's global influence. China and Russia have championed this growth to counter Western dominance, while Brazil and India have expressed reservations, fearing a dilution of their sway within the group. India's cautious stance is further influenced by its complex relationship with China.

The inclusion of Egypt and Ethiopia brings significant African representation, with both nations seeking economic revitalization through increased investment and trade opportunities. Egypt's strategic location and economic challenges make BRICS membership appealing, while Ethiopia's ties with China and its role in the Belt and Road Initiative underscore its geopolitical importance.

Saudi Arabia and the UAE, as leading Arab economies and major oil producers, add substantial economic weight to BRICS—in the case that Saudi Arabia makes the move to officially join. Their involvement also introduces their roles as regional mediators in conflicts.

Iran's entry, amid its adversarial stance toward the U.S., aligns with BRICS' broader objective of reducing Western economic influence. Nonetheless, the diverse foreign policy orientations of BRICS members, including those with closer ties to the West like India, Brazil, Saudi Arabia, and the UAE, highlight the bloc's internal complexities.

There are frequent concerns that the BRICS group's growing size and diversity may undermine its internal cohesion and make collective decision-making more difficult. In addition, certain geopolitical rivalries among members—such as Iran and Saudi Arabia (still on the fence) or China and India—and the lack of a formal institutional framework

or permanent secretariat continue to raise doubts about the group's long-term unity and effectiveness.

1.2 BRICS+ in a multipolar world - towards a new international trade order

This recent expansion, the renewed interest as well as relevance of the BRICS on the international stage is intrinsically linked to the return of great power rivalry, exemplified by escalating conflicts and the revival of tariffs and sanctions—such as those seen with Trump's return to the US presidency.

These recent events have exposed the fragility of global supply chains, particularly in agri-food systems. In this context, deeper cooperation among BRICS+ members is not only a geopolitical necessity but a geoeconomic imperative.

Under Trump's leadership following his return to the presidency this year, the United States has increasingly embraced unilateral trade measures, including sweeping tariffs and the imposition of trade barriers against various countries and sectors. This shift undermines the principles of the GATT and WTO, which have historically emphasized non-discrimination and the resolution of disputes through established legal frameworks. The US administration's preference for bilateral negotiations and informal, transactional diplomacy has replaced the collaborative, rule-based approach that characterized earlier U.S. foreign economic policy.

This trend reflects a resurgence of mercantilist strategies, where economic policies are designed to maximize national advantage, often at the expense of international norms and alliances. Furthermore, Trump's foreign policy has been characterized by efforts to realign global power structures, emphasizing the establishment of spheres of influence with strong ideological components.

This reordering challenges the multilateral consensus that has underpinned international relations over the past decades. Central to this strategy is Trump's focus on tariffs as a primary tool of economic diplomacy, viewing them as instruments of deterrence and leverage in negotiations. While this approach aims to assert U.S. dominance and rectify perceived trade imbalances, it risks destabilizing established economic partnerships and eroding the cooperative frameworks that have facilitated global prosperity.

Strengthening intra-BRICS trade, especially in agriculture, and jointly advocating for a more inclusive, rules-based multilateral trading system (MTS) can help safeguard their shared interests. Such collaboration would enhance food security, boost economic resilience, and offer a counterbalance to growing global fragmentation.

1.3 Brazil's 2025 BRICS Summit: an opportunity to advance agrifood cooperation and food security

As Brazil assumes the rotating presidency of BRICS for 2025, emphasizing a renewed commitment to sustainable development and multilateral cooperation among Global South nations and operating under the theme *"Strengthening Global South Cooperation for More Inclusive and Sustainable Governance,"* an agrifood cooperation agenda appears increasingly relevant. An agrifood sector agenda goes beyond food security. It is transversal and allows for the strengthening of ties in science, technology, academia, business and trade.

The hosting country has established six core priorities - which will all involve directly or indirectly the agrifood sector - for its presidency: (1) advancing global health cooperation, including equitable access to medicines and the elimination of neglected tropical diseases; (2) enhancing trade, investment, and financial governance, with reforms to financial markets and local currency use; (3) leading on climate change, through a BRICS Climate Leadership Agenda and a Leaders' Framework on Climate Finance; (4) promoting the responsible governance of artificial intelligence to support inclusive technological development; (5) reforming the multilateral peace and security architecture, aiming to strengthen diplomatic mechanisms and conflict prevention; and (6) deepening institutional cohesion within BRICS.

The proliferation of sanctions, trade restrictions, and geopolitical value-based alliances is fragmenting the global trading system and undermining the safety net provided by agricultural trade. Empirical studies consistently show that unhindered trade is essential for food security, particularly in the face of intensifying climate and environmental stresses.

However, sanctions—often implemented in pursuit of political change—rarely achieve their intended goals and may instead cause widespread collateral damage, especially in food systems (Pape, 1997; Makinsky, 2024). The Global South, already vulnerable to hunger and malnutrition, faces heightened risks from protectionist policies and failed multilateralism.

In this context, BRICS+ holds strategic potential as a stabilizing force, offering an alternative to Western-centric, geopolitically motivated trade blocks. By fostering internal trade integration, minimizing non-tariff barriers, and institutionalizing cross-border cooperation—through instruments such as the proposed BRICS grain exchange or shared digital certification platforms—the bloc can enhance food system resilience while promoting a more inclusive, multipolar order. Diplomatic investment in such cooperative mechanisms is not just economically sound, but also geopolitically prudent—especially in tackling shared global challenges like climate volatility, poverty, and conflict. (Gopinath 2024) BRICS+ should therefore be viewed not only as a potential geoeconomic alliance but as a critical node in safeguarding global food security through principled, pragmatic multilateralism.

2. BRICS global agri-sector outlook

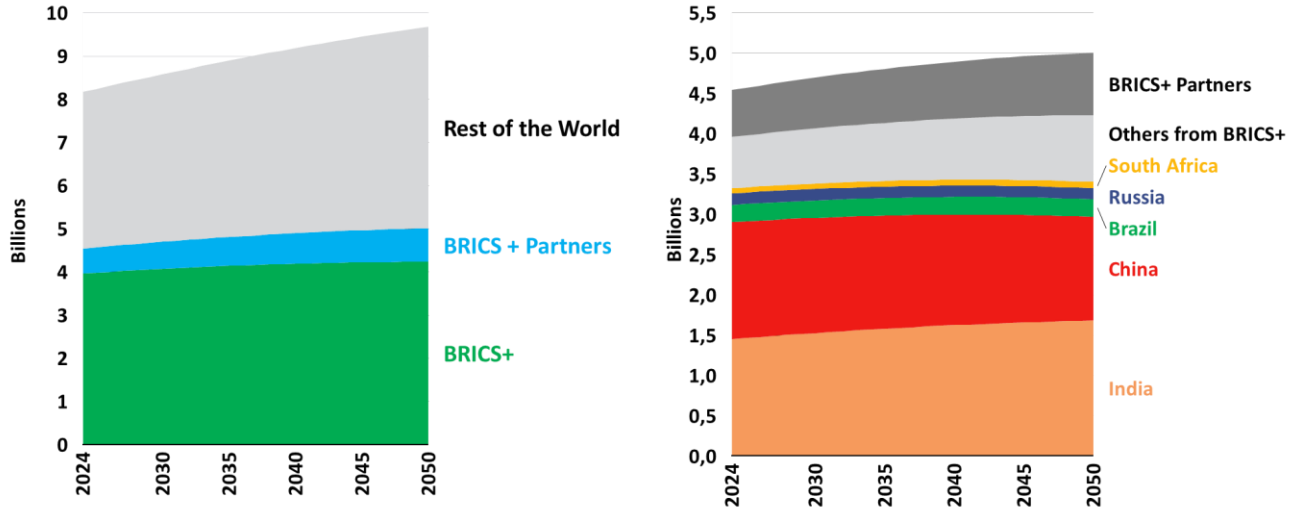
2.1 Feeding a growing world population

The demographic trajectory of the BRICS, BRICS+ nations, and the addition of the bloc's "partner countries" highlights the strategic urgency of prioritizing agricultural cooperation both within and beyond the bloc. As global population growth continues - projected to surpass 9.7 billion by 2050[7] -, significant and growing share of this increase will be concentrated in the Global South, particularly among BRICS+ countries and their partners (approximately 55%), which include populous and fast-growing nations such as Egypt, Ethiopia, Iran, and Nigeria. It is essential to emphasize

[7] Source: United Nations - Demographic Indicators, available at: https://population.un.org/wpp/downloads?folder=Standard%20Projections&group=Most%20used accessed on June 26, 2025.

that this aggregated growth conceals sharp disparities among individual members: India and several BRICS+ partner countries, including Ethiopia and Egypt, are experiencing robust demographic expansion, whereas others, such as China and Russia, face stagnation or demographic decline (Figure 1). These dynamics not only reflect broader global population trends but also redefine future food demand and exert growing pressure on agri-food production systems.

Figure 1. Population projection, in billions of people between 2024 and 2050



Source: Insper Agro Global based on United Nations (2025)

In addition to demographic growth, many of the countries associated with BRICS+ are experiencing economic expansion, with their populations attaining higher income levels, thereby increasing the demand for more diversified foods—particularly animal protein—at a rate that is expected to outpace population growth. This ongoing dietary transition further strains agricultural systems, intensifying resource use and underscoring the urgency of strategies that not only promote sustainable production growth but also ensure accessibility (availability and affordability) for a growing population. Meeting the food needs of this emerging population places food security and the development of the agri-food sector at the core of domestic policy agendas and the strategic cooperation efforts of BRICS. Given the persistent vulnerabilities in food systems across many of these nations - from climate risks to infrastructural fragility - coordinated action is not only a development imperative but also a critical geopolitical concern. Agricultural cooperation within BRICS and BRICS+ thus becomes a vital pathway to mitigating risks, strengthening resilience, and ensuring the bloc can sustainably meet the future needs of its populations.

Currently, food security is already a pressing concern in several BRICS+ countries. In Brazil, approximately 2,5 million people were affected by severe food insecurity[8]. India ranks 107th out of 121 nations on the Global Hunger Index, with nearly 195 million undernourished people, accounting for one-quarter of the world's undernourished

[8] https://www.gov.br/secom/en/latest-news/2024/07/un-hunger-map-2023-severe-food-insecurity-drops-85-in-brazil

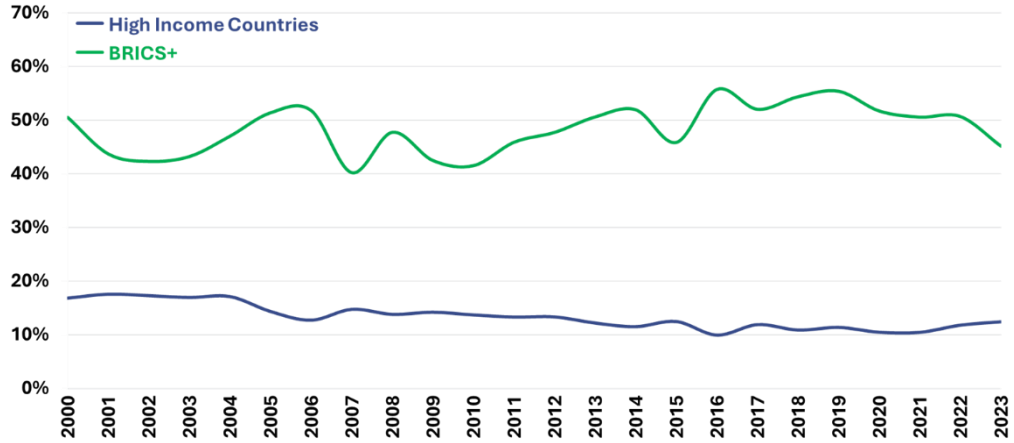
population[9]. This underlines the pressing need for food production and population access to become a strategic priority for bloc member states.

2.2 BRICS+ agricultural strengths and global food security potential

The BRICS+ countries account for approximately 35% of the world's agricultural land (42% when considering partner nations)[10] and contribute around 45% to the total global value of the most important grains and cereals in global food consumption[11] (Figure 2), encompassing some of the world's largest agricultural producers and exporters. Spanning over 800 million hectares of diverse agro-climatic zones, this region supports a wide range of crops and livestock activities, as well as a significant production of exportable surpluses - notably, China, Brazil, India, and Russia rank among the top five global agricultural producers.

Figure 3 illustrates the growth of the Total Factor Productivity (TFP) index in agricultural production, highlighting that BRICS nations, particularly China and Brazil, have shown significant advancements in productivity over the years - outperforming the global average and developed countries. This underscores a substantial untapped potential for further growth and development in agricultural productivity within these nations. The BRICS is also notable for low-cost food production, driven by high productivity levels, particularly in Brazil's tropical agriculture, which enables the cultivation of multiple harvests within the same production year —a factor that enables significant productivity gains with reduced land resource usage.

Figure 2. Share in the production of the most consumed grains and cereals for global food consumption[6] (%), between 2000 and 2023.



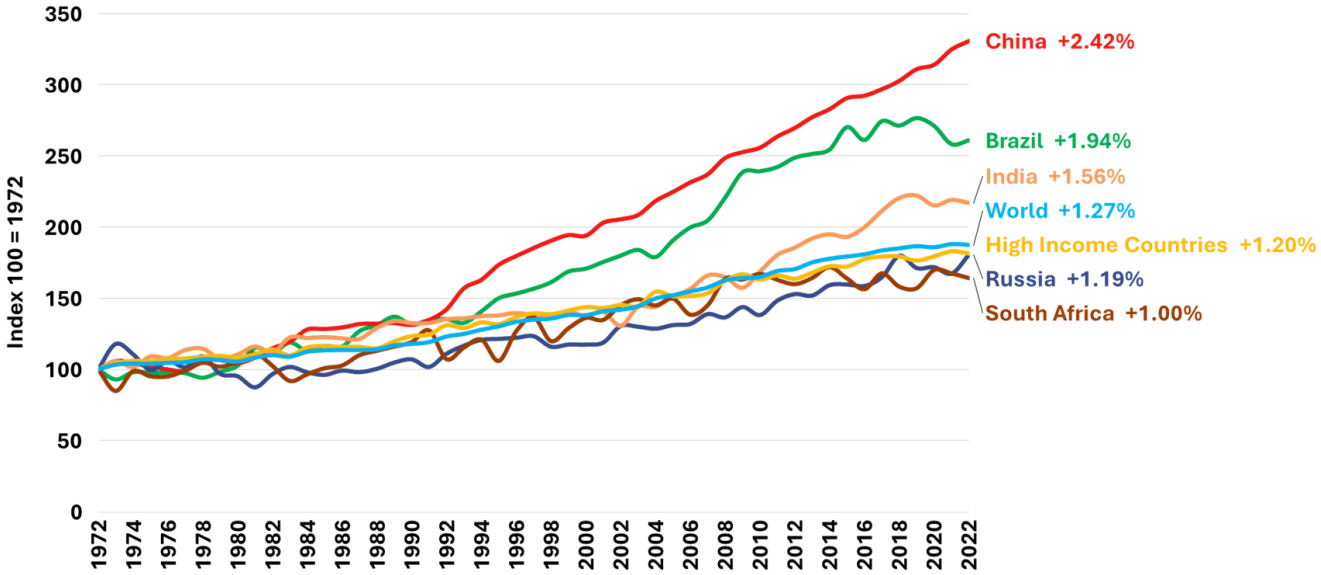
Source: Insper Agro Global based on FAOSTAT (2025)

[9] *Global Hunger Index 2024: Food Systems Transformation and Local Governance* (Concern Worldwide and Welthungerhilfe, 2024), https://www.globalhungerindex.org.:

[10] Source: FAOSTAT – Land Use, Avaliable at: https://www.fao.org/faostat/en/#data/RL accessed on June 26, 2025.

[11] For this assessment, we considered wheat, corn, rice, and soybean as the most consumed grains for food purposes.

Figure 3. Index of Total Factor Productivity (TFP), between 1972 and 2022, and CAGR



Source: Insper Agro Global based on USDA (2025).
Note: Compound Annual Growth Rate (CAGR) calculated in relation to the Total Factor Productivity (TFP) growth over the years.

2.3 Environmental Vulnerabilities

BRICS+ nations, as major agricultural producers, face significant risks from climate change, including rising temperatures, water scarcity, erratic rainfall, and extreme weather events. These challenges vary by region due to the bloc's diverse climates and directly impact agricultural productivity, food availability, and rural livelihoods, especially in areas reliant on rainfed farming and minimal infrastructure. For instance, recurrent droughts in India and Ethiopia disrupt grain and legume production, while water shortages in Iran and Egypt—aggravated by inefficient irrigation—limit crop yields. In 2024, floods in Indonesia and southern Brazil caused significant losses in staple crops like rice and corn, alongside droughts and wildfires in Brazil.

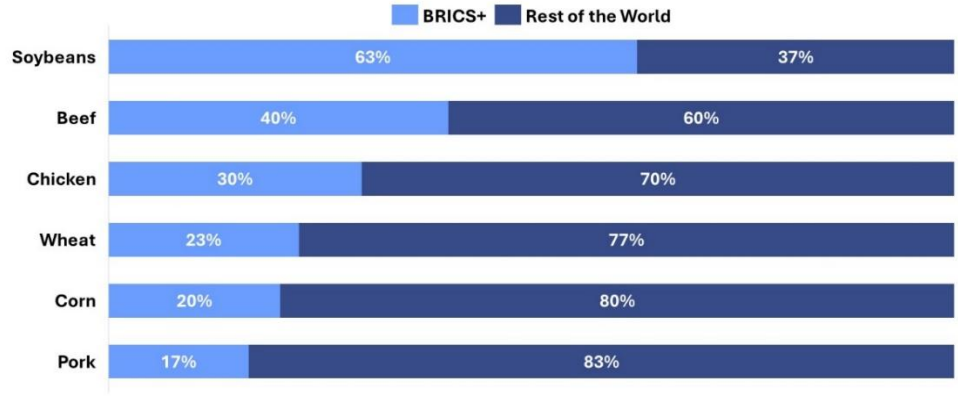
Climatic volatility also threatens bioenergy production, such as Brazil's sugarcane-based ethanol and Indonesia's palm oil, both vital to global biofuels market. These shocks disproportionately affect poorer populations, intensifying inequalities in countries like South Africa, India, and Egypt, where food insecurity is prominent. Furthermore, climate risks combined with logistical and institutional challenges weaken governmental responses. Without investments in resilient agricultural systems—irrigation, adaptive technologies, and land restoration— the BRICS+ bloc’s crucial role in global food security could be severely compromised.

2.4 BRICS+ an indispensable key player in the international trade of agriproducts

BRICS+ exhibits high intrabloc trade complementarity (demand within the bloc met by internal supply) and significant influence in the extrabloc product market. Analyzing the total trade volume of BRICS+ member countries, both intra- and extrabloc, highlights the bloc's pivotal role in the international food market — a trend reinforced by the noted productive growth. In 2024, trade — aggregating exports and imports — amounted to approximately USD 882.8 billion, accounting for 19.5% of global trade volume. For

agricultural inputs, this figure rises to USD 1.1 trillion. Moreover, as illustrated in Figure 4, BRICS+ countries hold major shares in global trade for highly significant food commodities, such as soybeans (63%), corn (20%), and wheat (23%).

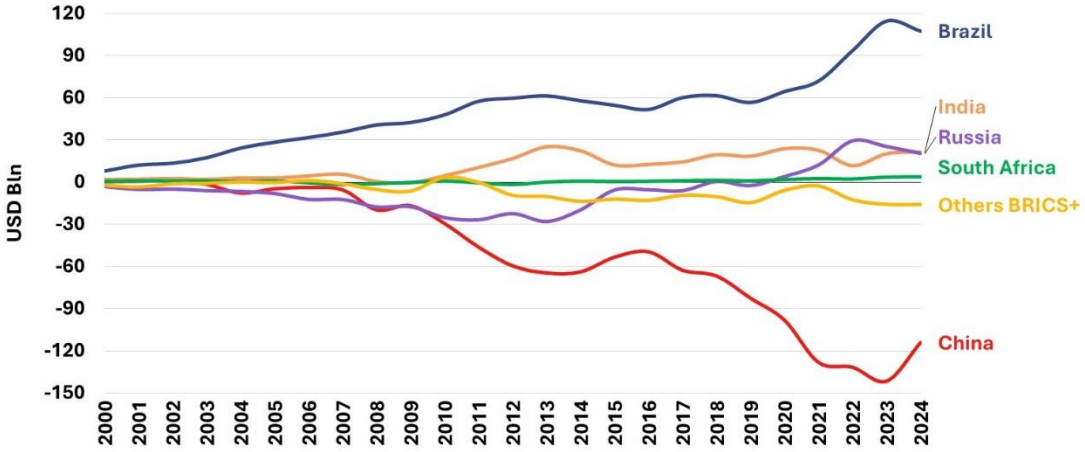
Figure 4. Share of trade volume (exports plus imports) of BRICS+ and the rest of the world by product



Source: developed by Insper Agro Global based on USDA data (2025).
Note: the calculation considers intra and extra-BRICS+ trade.

The high trade volume results from the complementarity between the countries. Brazil, India, and Russia emerge as predominant net exporters of agricultural commodities, while China and MENA (Middle East and North Africa) countries rely on imports to satisfy domestic demand. In 2024, the bloc recorded a positive agribusiness trade balance of USD 23 billion, driven by a collective surplus of USD 153 billion from Brazil, Russia, India, and South Africa, juxtaposed against a combined deficit of USD 130.1 billion from China and other member nations. This trade dynamic underscores the synergistic interactions within the bloc, positioning BRICS+ as a distinctive and influential entity in the global agrifood market.

Figure 5. Evolution of the total agribusiness trade balance of BRICS+ member countries, in US$ billion (current values), between 2000 and 2024

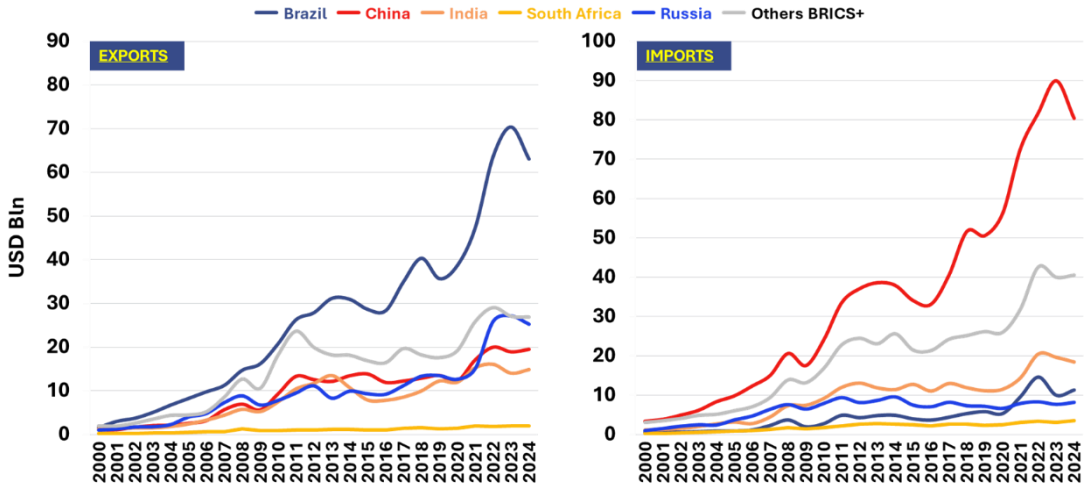


Source: developed by Insper Agro Global based on data from the Trade Data Monitor (2025).
Note: the calculation considers (1) agricultural products and inputs and (2) intra and extra BRICS+ trade.

Intra-bloc trade has been strengthening over the years, indicating that increased cooperation among countries in this sector could yield significant benefits. Since the early 2000s, trade exchanges among BRICS+ countries (intra-bloc trade) have grown

at a Compound Annual Growth Rate (CAGR) of 11.3%, increasing their share from 14% to 29% of the bloc's total trade volume, as illustrated in Figure 6. Given the composition of the bloc, which includes both major net exporters and net importers, the diversity of internally traded products is substantial. Among key agricultural commodities, soy complex products account for 29% of intra-bloc agricultural trade, followed by agricultural inputs (11%), meat (9%), palm oil (7%), sugar (6%), cereals (6%), seafood (3%), and various others – Figure 8.

Figure 6. Evolution of the major agribusiness intra-BRICS+ exporters and importers, in US$ billion (current values), between 2000 and 2024



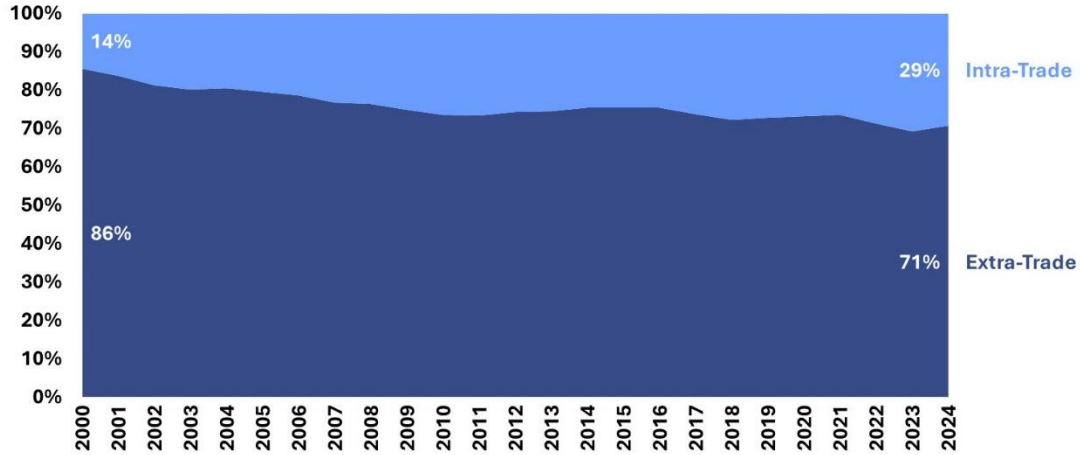
Source: developed by Insper Agro Global based on data from Trade Data Monitor (2025).
Note: the calculation considers both agricultural products and inputs.

Among the countries that trade with each other in the BRICS+, Brazil and Russia stand out as the main exporters of agribusiness products and inputs, while China and other members of the bloc as importers. Brazilian and Russian agriexports have grown at a galloping pace of 13.2% and 11.4% per year, on average, since the 2000s, representing 58% of intra-bloc sales in 2024. It is important to note that other BRICS+ members have also grown their participation, albeit small, rapidly in the same period, as is the case with Ethiopia and Egypt. On the other hand, China and countries located in the Middle East are among those that import the most from other BRICS+ members. Together, these countries imported the equivalent of US$ 107 billion in agribusiness products and inputs last year. Although the Chinese are net importers in intra-BRICS+ trade, their role as a supplier of agricultural inputs has gained relevance over the years, growing their exports of these products at a rate of 11.6% per year.

It is important to highlight that the growth in intra-bloc trade does not necessarily represent greater integration among all BRICS+ member countries. This expansion primarily reflects the increasing trade flows between Brazil and China. In 2024, Brazilian agribusiness exports to the bloc totaled USD 63 billion, with 70% directed to China. Similarly, Chinese imports of agricultural products from BRICS+ countries reached USD 79 billion, of which Brazil accounted for 65%. As Brazil stands as a major exporter of raw materials and China as a key supplier of agricultural inputs, this commercial partnership dominates a significant portion of the bloc’s internal trade

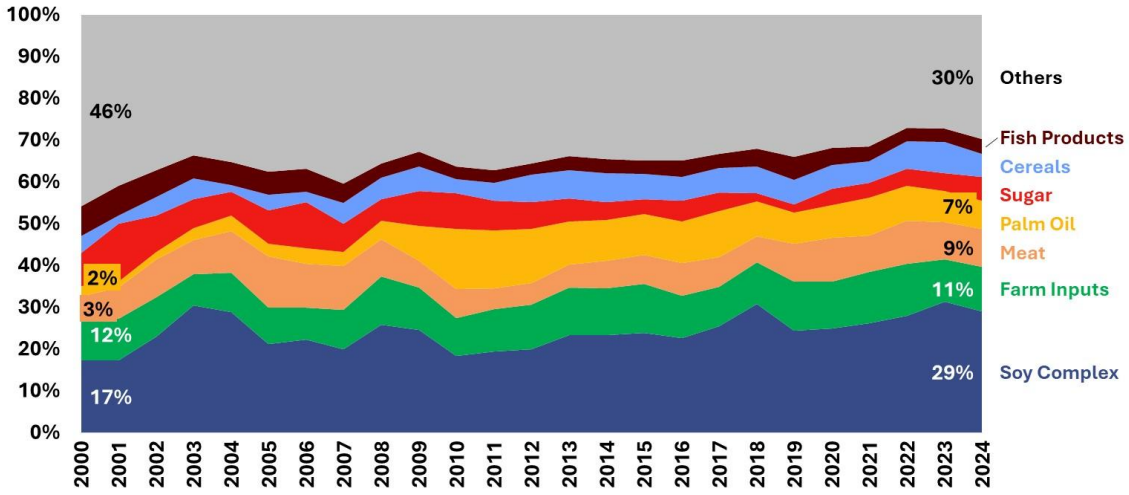
flows. Furthermore, BRICS+ does not yet have any formal trade agreements (such as trade benefits or tariff reductions) to support this evaluated growth.

Figure 7. Evolution of the share of intra- and extra-BRICS+ agribusiness trade, as a percentage of total trade (exports and imports)



Source: developed by Insper Agro Global based on data from the Trade Data Monitor (2025).
Note: the calculation considers both agricultural products and inputs.

Figure 8. Evolution of the share of agribusiness products traded intra-BRICS+, as a percentage of total trade (exports plus imports)

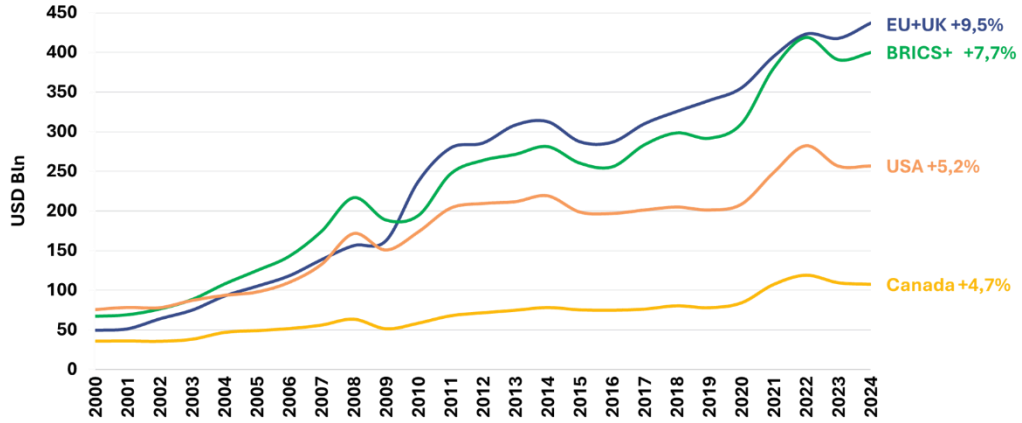


Source: developed by Insper Agro Global based on data from the Trade Data Monitor (2025).

The trade relations between BRICS+ countries and the rest of the world also hold significant importance, reinforcing the bloc's position as a major supplier of food and agricultural inputs. In 2024, exports outside the BRICS+ bloc reached approximately USD 400 billion, with 20% directed to the European Union and the United Kingdom, 14% to the United States, and 6% to Japan. Imports, on the other hand, amounted to USD 366.2 billion, primarily originating from the European Union and the United Kingdom (21%), the United States (14%), Thailand (6%), and Australia (6%), among others. Most of the externally traded goods include agricultural inputs (18%), such as fertilizers and machinery, as well as fruits and vegetables (9%), cereals (7%), and soybean complex products (7%), among others.

BRICS+ plays a prominent role when compared to other global agricultural trade actors. Considering exports of agribusiness products and inputs, the bloc ranks second only to the European Union and the United Kingdom, which together exported USD 437.3 billion last year. Although it is possible to make this comparative calculation, it should be noted that BRICS+ is not an economic bloc like the European Union that has a common external tariff and free transit of goods between its members. Therefore, it is important to exercise caution when comparing them as global players in the trade of agribusiness products. The United States follows in third place with USD 256.9 billion, trailed by Canada with USD 107.6 billion – Figure 8. Thus, it is impossible to overlook BRICS+ as a true powerhouse in the context of international agribusiness trade, given its undeniable global relevance.

Figure 9. Evolution of the world's largest agribusiness exporters, in billions of current dollars, between 2000 and 2024



Source: developed by Insper Agro Global based on data from the Trade Data Monitor (2025).
Note: calculation considers only extra-bloc exports from BRICS+ and EU+UK and exports of agricultural products and inputs.

It is important to highlight the strategic asset that the group holds in the current scenario. With increasing geopolitical and commodity price volatility, being a major agribusiness player is crucial to mitigating supply shocks. In addition, it works as a bargaining tool in trade wars, such as the one between the US and China. To ignore this growing role in global trade in food and inputs is to underestimate the bloc's potential in geopolitical dynamics and global market influence.

3. BRICS+ Agrifood agenda, initiatives, priorities and policy recommendations

3.1 BRICS+ Agrifood current agenda and priorities

Since 2010, BRICS countries have engaged in structured agricultural cooperation through annual Agriculture Ministers' Meetings (AMMs), establishing a multilateral framework focused on food security, rural development, innovation, and sustainability. This collaboration has been progressively institutionalized through the BRICS Action Plan on Agricultural Cooperation (2021–2024) and further strengthened by the 2016 Memorandum of Understanding (MoU) on the BRICS Agricultural Research Platform

(BARP), which became operational in 2021 under India's leadership. BARP has the potential to become a central mechanism for advancing joint research in climate-smart agriculture, biotechnology, and digital farming.

Recent declarations and action plans have emphasized inclusive value chains, resilient food systems, and sustainable agricultural practices in the face of global shocks such as climate change and the COVID-19 pandemic. The upcoming 2025–2028 Action Plan—adopted at the 15th BRICS Ministerial Meeting on Agriculture—builds on these foundations and introduces a multi-dimensional strategy for cooperation across sustainability, innovation, trade facilitation, and rural inclusion.

Key national and regional initiatives featured in the current agenda include Brazil's National Program for Converting Degraded Pastures into Sustainable Production Systems (PNCPD), which supports ecological land rehabilitation and sustainable intensification. The plan also prioritizes digital innovation through the commitment to adopt electronic certification systems to enhance traceability, safety, and efficiency in agricultural trade.

In terms of infrastructure development, the declaration recognizes significant deficits in storage, transport, and logistics—particularly in countries like Brazil, where only 15% of grain storage capacity is on-farm, compared to 54% in the U.S. and 80% in Canada.[12] Addressing these gaps is central to reducing post-harvest losses and strengthening agricultural value chains.

Inclusivity is a key pillar of the agenda, with targeted policies to empower smallholder farmers—who make up a substantial share of the agricultural workforce across BRICS nations—and to promote rural youth engagement. The agenda also places a strong emphasis on agroecological sustainability, including the promotion of native and indigenous crop varieties, efforts to reduce food waste along the supply chain, and the encouragement of biodiversity-friendly farming practices.

To strengthen food system resilience and fight food price volatility, BRICS countries are discussing the establishment of a **grain exchange mechanism** to facilitate intra-BRICS trade in staple commodities and reduce reliance on external grain markets. In parallel, the Action Plan underscores the importance of **strategic food reserves** and enhanced storage capacity to stabilize food access during crises, with a particular focus on supporting vulnerable populations.

The **BRICS Food Import Financing Facility** is also under consideration, drawing inspiration from existing FAO frameworks. This proposed facility would help ensure food access for low- and middle-income countries during periods of high import costs or supply disruptions, complementing other financial and technical cooperation mechanisms.

In alignment with broader BRICS trade policy, the Agriculture Working Group's 2025 declaration reaffirms the bloc's commitment to **agricultural trade facilitation**, reduced non-tariff barriers, and strengthened multilateralism. Emphasis is placed on WTO reform, digital trade governance, and cooperation in sanitary and phytosanitary (SPS) measures. These priorities are consistent with the BRICS 2030 Economic Partnership

[12] COMPANHIA NACIONAL DE ABASTECIMENTO (Conab). *Estudo sobre a capacidade de armazenagem no Brasil (2013–2017)*. Brasília: Conab/CEDES, 2017. Disponível em: https://antigo.conab.gov.br/armazenagem-k2/item/download/23466_6914c98c5f82180075c25ef4af895c31.

Strategy, which aligns food system development with green growth, reduced transaction costs, and greater South-South cooperation.

Taken together, these initiatives reflect BRICS's intention to shape a more inclusive, equitable, and resilient global agrifood order. This working paper now proceeds to outline detailed, action-oriented policy recommendations aimed at maximizing the implementation effectiveness of the BRICS+ agrifood agenda.

3.2 Policy Recommendations and Key Actions

The following recommendations build on the work of the BRICS Agriculture Working Group (AWG), past contributions from member states, and research from leading international organizations such as the UN, FAO, WHO, and ASEAN. They have been developed into clear policy actions designed for step-by-step adoption, with the objective to institutionalize cooperation, sustain ongoing efforts, and turn ideas into concrete realities. Achieving this requires structured collaboration among governments, the private sector, academia, and the scientific community.

Together, these initiatives form a practical and phased roadmap to embed longstanding priorities within BRICS+ cooperation. Their implementation will reinforce the bloc's leadership in food security and sustainable agrifood trade—delivering tangible benefits to millions, fostering inclusive economic growth, and strengthening geopolitical influence.

I. BRICS land restoration strategy: advancing sustainable agriculture and food security

Objective:
Restore degraded land across BRICS to enhance food security, climate resilience, and rural development—without creating new barriers to trade or food access.

Key policy actions:

1. Prioritize Land Restoration for Food Security
Adopt degraded land restoration as a central policy for sustainable agriculture. Scale programs like Brazil's PNCPD to boost productivity without expanding land use, reducing deforestation and inequality.

2. Recognize Environmental Co-Benefits
Integrate restoration into climate, biodiversity, and soil policies. Highlight benefits including carbon sequestration, erosion control, and water and soil quality improvements.

3. Deliver Measurable Results
Set clear targets for soil health, water retention, erosion reduction, and crop/livestock yields to ensure tangible, trackable progress.

4. Scale Technical Support
Strengthen rural extension and training for all producer sizes. Promote proven sustainable land management practices for broad adoption.

5. Unlock Blended Finance
Use models like ECO INVEST BRASIL to mobilize private capital via public-private finance platforms and long-term hedging tools to reduce investment risk.

6. Use Soil Suitability Zoning
Guide land use decisions (e.g., food crops, agroforestry, rewilding) with soil maps and technical zoning to optimize productivity and ecosystem benefits.

7. Build a BRICS Monitoring Platform
Develop a shared satellite and AI-driven system for land degradation mapping, data sharing, and transparent progress tracking.

8. Establish a BRICS Restoration Task Force
Create a task force under the BRICS Agricultural Research Platform (BARP) to coordinate policy, research, and implementation.

9. Integrate into BRICS Action Plan
Include pasture restoration as a core pillar of the 2025–2028 BRICS Agricultural Action Plan to ensure continuity and prioritization.

10. Mobilize Green Finance
Leverage climate finance, carbon markets, and green credit to fund national restoration programs. Consider a joint BRICS Restoration Finance Facility.

11. Promote South–South Collaboration
Expand knowledge exchange via replication of successful programs (e.g., Brazil's ABC+, PNCPD), joint pilots, and technical training.

12. Launch Joint R&D
Collaborate on soil regeneration, regenerative grazing, and climate-smart agriculture through research missions and innovation hubs.

13. Engage Global Partners
Work with FAO, UNCCD, IFAD, and others for funding, technical support, and international visibility of BRICS-led restoration.

14. Extend Cooperation to Global South
Offer BRICS-led technologies and finance tools to other developing nations to strengthen global South–South cooperation.

15. Institutionalize in BRICS Governance
Make pasture restoration a permanent agenda item at BRICS Agriculture Ministers' Meetings and Summits for sustained leadership and alignment.

16. Ensure Good Governance
Define clear rules, eligibility, and reporting for investment programs. Transparency will attract financing and ensure accountability.

17. Monitor, Evaluate, Communicate
Create unified indicators and M&E systems to measure outcomes in soil health, productivity, emissions, biodiversity, and rural incomes. Publicly report results for continuous improvement.

18. Avoid New Trade Barriers
Ensure that restoration and sustainability efforts support—not restrict—trade, food production, and access to affordable food.

II. BRICS digital trade certification roadmap: accelerating trade, food security, and efficiency

Objective:
Modernize trade processes across BRICS through a secure, interoperable digital certification system—enhancing efficiency, traceability, and compliance in cross-border trade, especially for agriculture—**without creating new trade or food access barriers**.

Key Policy Actions:

1. Launch BRICS+ Digital Certification Task Force
Establish a cross-sector task force (customs, trade, agriculture, food safety, veterinary, and tech) to lead development and implementation of a joint digital certification system.

2. Institutionalize Coordination
Hold regular task force meetings with clear agendas and annual reporting at BRICS Summits to ensure political support and track progress. The initiative and participation may be progressive and could also concern a limited number of sectors in order to promote the practice gradually.

3. Harmonize Technical Standards
Develop a BRICS+ model with unified digital certification protocols—starting with high-priority sectors—tailored to national contexts and compatible with existing systems.

4. Adopt a Phased Rollout Strategy
Integrate digital certification systems gradually, allowing countries to align with the roadmap at their own pace to ensure smooth adoption.

5. Digitalize Origin and SPS Requirements
Streamline and secure verification of origin, sanitary, and phytosanitary measures to enhance compliance and trade facilitation.

6. Promote Mutual Recognition of Standards
Advance science-based SPS and TBT equivalence to reduce redundant checks, strengthen food safety, and avoid unjustified Non-Tariff Barriers (NTBs).

7. Share Best Practices and Existing Frameworks
Facilitate inter-country learning and align with global standards such as Codex Alimentarius. Engage FAO, UN agencies, and others for technical guidance.

8. Upgrade Digital Infrastructure
Assess and invest in essential infrastructure to support interoperability. Address regulatory, technical, and operational barriers to implementation.

9. Mobilize Financing for Digital Systems
Leverage the New Development Bank and international institutions to fund infrastructure development and certification system deployment.

10. Set a Unified Timeline with Milestones
Define clear milestones for development, testing, and rollout. Communicate benefits, including reduced delays, cost savings, and improved traceability.

11. Extend Cooperation Beyond BRICS
Open standards and cooperation frameworks to non-BRICS nations to drive global adoption and increase the influence of BRICS-led trade innovations.

12. Ensure Sustainability Without Trade Disruption
Reaffirm that sustainability initiatives—while essential—must not restrict trade flows or access to affordable food and agricultural products.

III. BRICS Food Import Financing Facility (FIFF): strengthening crisis response and food system resilience

Objective:
Establish a dual-track financing mechanism to stabilize food imports during crises and support long-term food system resilience—without creating new barriers to trade or food access.

Key Policy actions:

1. Establish a Dual-Track Financing Model
   Use the CRA for short-term emergency financing and the NDB for medium-term development loans targeting food import substitution and resilience.

2. Amend CRA Protocols to Include Food Crises
   Allow CRA funds to respond to food-related balance-of-payment shocks.
   Introduce automatic triggers based on inflation, price spikes, or reserve depletion.

3. Create a Food Security Window at the NDB
   Launch a dedicated financing window to support food imports, infrastructure, and input supply with concessional loans, guarantees, and technical assistance.

4. Set Up a Joint Food Security Coordination Unit
   Establish a BRICS technical secretariat to coordinate project design, assess vulnerability, and guide applications in collaboration with FAO, IFAD, and national ministries.

5. Develop a BRICS Common Food Security Index (CFSI)
   Define shared indicators (e.g., import dependence, price volatility, household food spending) to guide fund allocation and ensure transparency.

6. Pilot the Facility in High-Risk BRICS+ Countries
   Start implementation in 2–3 vulnerable countries (e.g., Egypt, Ethiopia, South Africa), focusing on critical imports and trade infrastructure.

7. Ensure Inclusive Access for All Members
   Design flexible financial terms—including concessional rates, grace periods, and blended finance—for low-income and new BRICS+ members.

8. Link Financing to Strategic Conditions
   Require investments in domestic food production, local input industries, sustainable practices, and climate adaptation to reduce future import reliance.

9. Coordinate with Global Partners
   Collaborate with FAO, IFAD, World Bank, AfDB, and AIIB for co-financing, policy design, and technical support aligned with global food security goals.

10. Integrate FIFF into the BRICS 2025–2028 Action Plan
    Include the facility as a flagship initiative in the BRICS agricultural agenda. Report progress and expansion strategies at BRICS Summits and Ministerial Meetings.

IV. Infrastructure for agri-trade: enabling market-driven development for BRICS agroeconomies

Objective:
Address trade-related infrastructure gaps through market-based solutions, public-private collaboration, and private sector leadership—without introducing new trade barriers or undermining affordability.

Key Policy Actions:

1. Launch a BRICS Agri-Infrastructure Investment Platform
   Create a multi-stakeholder platform to connect governments, financial institutions, agribusinesses, and commodity traders. Enable transparent matchmaking and facilitation—not direct public investment.

2. Promote Innovative Financing Instruments
   Encourage development of green bonds, sustainability-linked bonds, and impact funds. Introduce risk-sharing tools such as credit guarantees and first-loss capital to mobilize private finance.

3. Support Private Sector Digital Solutions
   Facilitate the development of digital marketplaces, logistics platforms, and traceability tools through infrastructure support and regulatory clarity—without state ownership.

4. Streamline Trade Procedures and Harmonize Standards
   Advance voluntary harmonization of sanitary, phytosanitary, and customs protocols. Deploy tech-enabled customs systems (e.g., single-window platforms) to reduce costs and delays.

5. Leverage Commodity Value Chain Actors
   Engage traders, processors, and agribusiness firms as anchor investors to co-develop infrastructure. Support models such as contract farming and cooperatives to scale investment.

6. Enable Private and NGO-Led Capacity Building
   Support extension, training, and technology dissemination by private actors and civil society, reducing the need for expanded public-sector service delivery.

7. Embed Sustainability via Market Incentives
   Promote ESG-compliant infrastructure through voluntary certification schemes and climate-aligned financing incentives to mainstream climate resilience.

V. Agri-food Research and Academic Cooperation: Advancing a Sustainable BRICS Green Revolution

Objective:
Build a new, sustainable Green Revolution across BRICS through deeper academic collaboration—driving innovation, climate resilience, and productivity via shared research, mobility, and knowledge systems.

Key Policy Actions :

1. Expand the Academic Role of the BRICS Agriculture Working Group (AWG)
   Create a dedicated academic subcommittee under the AWG to coordinate research agendas, joint publications, and curriculum development supporting a modern Green Revolution.

2. Establish a BRICS Academic Knowledge Hub
   Leverage digital certification infrastructure to launch an open-access hub for agricultural research data, innovations, and case studies, modeled on the collaborative spirit of the original Green Revolution.

3. Integrate Scholarship and Exchange Programs into AWG Projects
   Institutionalize multilateral student and faculty mobility linked to climate-smart agriculture, sustainable intensification, and innovation in line with the goals of a sustainable Green Revolution.

4. Scale the BRICS Agricultural Research Fund with Thematic Focus
   Co-finance joint projects focused on food security, low-emissions agriculture, and value chain innovation—advancing research to catalyze a second Green Revolution adapted to 21st-century challenges.

5. Host Annual BRICS Agritech Academic-Industry Summits
   Bring together academia, agribusiness, and policymakers to fast-track tech transfer and innovation uptake critical to productivity and sustainability gains.

6. Harmonize Research Standards and Ethics
   Develop unified protocols for data, intellectual property, and ethics aligned with AWG trade and certification frameworks to support cross-border collaboration.

7. Include BRICS+ Members in Academic Networks
   Expand academic frameworks to integrate new BRICS+ countries into the research ecosystem, ensuring inclusive leadership in global agricultural transformation.

8. Promote Public-Private-Academic Partnerships
   Facilitate trilateral collaboration through AWG platforms to link universities,

government, and industry in building the next-generation agri-innovation landscape.

VI. Agroinsurance and reinsurance: building risk resilience in Brics agriculture

Objective:
Establish a BRICS-wide agricultural reinsurance mechanism to strengthen rural resilience, stabilize food systems, and manage climate and market risks through pooled resources and innovation in insurance.

Key Policy Actions :

1. Create a BRICS Agricultural Risk & Reinsurance Working Group
   Form a joint task force led by ministries of agriculture and finance, national reinsurers, and the NDB to design a cooperative framework for agricultural reinsurance.

2. Pilot a BRICS Reinsurance Pool
   Launch a regional risk-sharing mechanism targeting droughts, floods, pests, and price shocks in vulnerable and export-oriented farming zones.

3. Include Sovereign and Private Agri-Insurers
   Adopt a co-reinsurance model that integrates state-backed insurers and private sector providers to expand coverage and reduce premiums.

4. Leverage the NDB and Development Banks
   Incorporate insurance-linked instruments into rural finance, irrigation, and storage projects. Mobilize the NDB to backstop risk exposure and develop blended finance products.

5. Promote Parametric and Index-Based Insurance
   Accelerate development of parametric insurance products for rapid payouts using climate, weather, and yield data to improve coverage reliability and affordability.

6. Facilitate Cross-BRICS Data Sharing
   Enable access to shared weather, satellite, soil, and yield data to enhance actuarial modeling, pricing accuracy, and innovation in insurance products.

7. Position the Facility as a BRICS+ Platform
   Open access to African, Asian, and Latin American partners facing similar climate vulnerabilities. Offer technical assistance and co-financing with support from NDB and FAO-aligned institutions.

8. Make Agroinsurance a Strategic Deliverable in 2025
   Embed the BRICS reinsurance initiative in the 2025–2028 BRICS Agricultural Action Plan as a flagship priority of Brazil’s Summit presidency.

VII. BRICS grain exchange: enhancing food sovereignty and market transparency

Objective:
Reflect about the strategic difficulties to create a unified grain trading platform. More in-depth research is required to turn this project into reality. Successfully implementing this project could however help boost food security, price transparency, and reduce dependence on Western markets through coordinated BRICS cooperation.

Key Policy Actions :

1. Mandate a Feasibility Study (2025–2026)
   Task BARP and national grain boards with assessing technical, legal, market, and currency frameworks—including infrastructure readiness and use of BRICS digital currency.

2. Establish a Multilateral Task Force
   Form a task force with representatives from agriculture, trade, finance ministries, private sector stakeholders, producers, and traders to steer design and implementation.

3. Launch a Pilot Program
   Begin with 2–3 key BRICS members (e.g., Russia, Brazil, India) to test logistics, storage, digital pricing, and trading systems under real conditions.

4. Develop a Unified Regulatory Framework
   Harmonize grain quality standards, certification, dispute resolution, and ensure mutual recognition of licenses and traceability protocols.

5. Leverage Technology and Fintech
   Build a blockchain-enabled digital platform with real-time pricing, integrating national payment systems and exploring a BRICS agri-token for settlements.

6. Enhance Infrastructure and Storage Capacity
   Jointly invest in logistics corridors, ports, and strategic grain silos—prioritizing rural areas to support smallholder farmers.

7. Ensure Food Security and Reserve Integration
   Align the grain exchange with the BRICS Food Security Reserve for surplus trade management and emergency procurement coordination.

8. Include BRICS+ Countries and Regional Partners
   Invite participation from key grain-importing BRICS+ countries (e.g., Egypt, UAE, Ethiopia) to increase market liquidity and broaden impact.

9. Provide Incentives for Participation
   Offer tax relief, fee reductions, and trade risk guarantees to encourage early adoption and manage price volatility.

10. Publicize and Institutionalize the Initiative
    Announce the roadmap at BRICS Summits, embed it in the 2025–2028 BRICS Action Plan, and provide regular updates through ministerial meetings.

VIII. BRICS food security reserve: strengthening resilience and price stability

Objective:
Create a coordinated food reserve to enhance resilience against global shocks, stabilize prices, and secure staple supplies across BRICS nations.

Key Policy Actions :

1. Study Existing Models
   Analyze successful food reserve systems like ASEAN+3 Emergency Rice Reserve, African Union Food Reserve, and WFP stocks to inform BRICS design.

2. Define Reserve Framework
   Establish clear guidelines on commodities, reserve sizes, storage standards, and operational rules.

3. Form an Expert Working Group
   Set up a BRICS Food Security Reserve Expert Group to coordinate planning and implementation.

4. Share Best Practices
   Facilitate knowledge exchange among national reserve agencies (e.g., CONAB, Gosrezerv, FCI, NAMC) to align management approaches.

5. Create Governance Structure
   Establish a multilateral secretariat or governance body for transparent coordination, activation, and replenishment oversight.

6. Secure Sustainable Financing
   Design cost-sharing mechanisms and leverage the New Development Bank to fund infrastructure and operations.

7. Develop a Shared Information Platform
   Build a real-time system for monitoring stocks, production forecasts, and market data to improve coordination.

8. Launch a Pilot Program
   Test the reserve system with select countries and commodities before full-scale rollout.

Conclusion

Agricultural cooperation and food security must become central pillars of the BRICS agenda, offering not only a pragmatic response to urgent global challenges but also a strategic opportunity to deepen the group's relevance and cohesion. By jointly advancing an Agri-trade sector cooperation agenda, BRICS+ countries can reinforce their collective capacity to address shared domestic issues—ranging from rural development to sustainable farming—while simultaneously positioning themselves as key players in the global food system.

With global food demand projected to grow even faster than population growth - in an increasingly unstable world, the ability of emerging economies to ensure food security will be critical to global stability. In this context, South–South cooperation under the BRICS+ umbrella can provide a robust platform for innovation, knowledge-sharing, and trade expansion in agri-food sectors. Strengthening these ties not only helps to tackle real-world problems—such as hunger, supply chain fragility, and environmental stress—but also unlocks significant economic opportunities for BRICS agricultural producers.

By embracing this agenda, BRICS can add a meaningful layer to its geopolitical and economic strategy, asserting itself as a driver of inclusive development and a guarantor of global food security.

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Expedient
INSPER – Global Agribusiness Center

General Coordination
Marcos Sawaya Jank

Researchers
Gabriela Mota
Cinthia Cabral da Costa (Embrapa Instrumentation)
Victor Martins Cardoso
Leandro Gilio*
Arthur Chiodi

Contact
*leandrog3@insper.edu.br / https://agro.insper.edu.br/

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