

Soya in Bolivia: Dependency and the production of oleaginous crops

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Soya arrived in Bolivia with the first Japanese and Mennonite settlers who arrived in the east of the country in the mid 1950s. In those days, the characteristics of soya were very different from those of today, as the crop was grown for family use. Its expansion as a commercial crop began in the 1970s as a result of State policies that favoured the crop and promoted it on a commercial level.

During the first stage (the 1970s) the policies were:

- The implementation of the Bohan Plan (1942), created by an economic mission from the USA which proposed the colonisation of eastern Bolivia for the development of large-scale agriculture (a recommendation known as 'La Marcha al Oriente'- The March to the East).
 - The completion of the plans for the physical integration of the Department of Santa Cruz with western Bolivia through the construction of road and railway links.
 - The implementation of an aggressive internal policy for the colonisation of the east, and the attraction of foreign communities during the mid 1950s.
 - The execution of State policies which contradicted the Agricultural Reform of 1953 by not affecting the large properties, giving away large tracts of land to the business sector, and by providing loans from social funds.
- As a result, the production of the agro-industrial sector was consolidated in what became known as the 'Integrated Northern Zone', a region to the north of the city of Santa Cruz on the banks of the Rio Grande.

During the second phase (the 1980s) soya expansion increased due to:

- The commencement of the 'Lowlands of the East' project which was financed and lead by the World Bank. Through the project finances were assigned to the agricultural expansion in the so-called lowlands of the east, that is, east of the Rio Grande.
- The declaration from the Comunidad Andina de Naciones (CAN, the Community of Andean Nations) as an area of free trade, resulting in the creation of a new agro-industrial centre: the 'Eastern expansion Zone'.

Today, the two zones of the Department of Santa Cruz (Integrada and Expansion) are the geographical base for soya production and related industries in Bolivia. Soya is one of the most important export products to come out of this area (valued at approximately US\$360 million in 2006), and its development has caused a series of negative socio-economic impacts.

This chapter describes the dependence caused by the soya industry in Bolivia on a political, economic, and recently, at a nutritional level. It has been written as a result of a review of existing literature, as well as interviews and visits to different individuals within the soya industry.

Approval processes for GM soya: Consigning Bolivian policies to the interests of the oleaginous crop sector.

Few agricultural activities in Bolivia have benefited as much from State aid as soya. Its consolidation has been facilitated by policies whose objectives are to:

- Improve the infrastructure through the construction of routes for the transit of goods, agricultural produce and value-added products;
- Increase the availability of manual labour and providers of cheap raw materials through policies to colonise the east of the country with families from the valleys and the high plateau;
- Facilitate the sale of large expanses of land by private companies and foreigners;
- Provide fiscal loans to the business sector dedicated to the production and processing of soya; and
- Open regional markets for soya and its by-products.

The approval process for GM soya in Bolivia (where this is the most important oleaginous crop) has received open support from the Government despite a series of legal and technical considerations and lawsuits from social groups, civil organisations, public petitions and even some government officials.

The most obvious irregularities of the above process have been:

- The approval in 2005 of GM soya resistant to the herbicide glyphosate within a legal context characterised by the lack of legislation on Biosecurity and an absence of regulations reached through public consensus.
- The appeal against the Supreme Decree (D.S. 25929) for the creation of an agreement on biosecurity¹. This appeal took place in 2002 and was carried out by Government officials. It was a necessary part of the strategy of the soya industry to re-initiate field trials of glyphosate-resistant GM soya.
- The exclusion of growers and consumers from the review process

¹ Based on social protests brought about by the setting up of GM trials in the country, the D.S. 25929 was announced in 2000. It established the creation of regulations on biosecurity with the collaboration of social groups, although this never took place.

for requests for approval of GM soya, and the inclusion of applicants through the justification that the National Biosecurity Committee (CNB) proclaimed itself as an impartial, specialist jury for the review and evaluation of applications for approval of genetically modified organisms, whilst representatives of social groups and civil society were excluded from the evaluation process. Nevertheless, representatives of the Fundacion de Desarrollo Agricola de Santa Cruz (FUNDACRUZ, the Agricultural Development Foundation of Santa Cruz) and the Asociacion Nacional de Productores de Oleaginosas y Trigo² (ANAPO, the National Association of Producers of Oleaginous and Wheat Crops) took part in the 8th meeting of the CNB in July 2004. This contradicted the CNB's supposedly impartial position. Justification for the approval of GM soya were based on the international market and the need to reduce soya production costs. However, the real undercurrent of FUNDACRUZ activities has been the elimination of the competition from Bolivian soya in non-GM soya markets, being as Bolivia and the Mato Grosso are the only regions in the Southern Cone producing soya by conventional means.

- The evaluation and approval of GM soya by using incomplete and inappropriate information. Reports on GM soya were compiled by the Oficina Regional de Semillas (ORS, the Regional Seed Office) in Santa Cruz, whose personnel lacks the skills to carry out risk evaluations on GM crops, as they specialise in the certification of conventional seeds. The ORS personnel were trained by Monsanto to carry out this study and they openly supported the release of GM soya. The evaluation did not consider the technological package associated with soya, its socio-economic impacts of cultivation, nor any estimate of risk. The safety study was carried out by the Servicio Nacional de Sanidad Agropecuaria e Inecuidad Alimentaria (SENASAG, the National Agricultural Health and Nutritional Safety), and was limited to one revision of the literature provided by Monsanto relating to studies carried out in other countries. The safety study did not include the technological package characterised by soya's heavy use of agrochemicals. There were no laboratory trials on allergies, toxicity, or genotoxic effects from a local nutritional and socio-economic context. Added to these failures is the fact that the CNB did not present any report whatsoever to the Department of Natural

² FUNDACRUZ is a private company composed mainly of Brazilian agricultural producers. It was created by agreement with the Fundacion de Apoyo a la Investigacion Agropecuaria de Mato Grosso (the Foundation for the Support of Agricultural Research in Mato Grosso).

Resources and Environment, as required by Biosecurity regulations. The decision to approve GM soya was taken simply on the basis of the ORS and SENASAG report.

On a technical level, weaknesses within the study are evident when comparing what is specified within the final evaluation report presented by the ORS with the actual events taking place in the field:

- Negative effects on ecosystems: the report states that '*Given that the EPSPS³ proteins produced in soya plants can be found naturally in wild plants and fungi, and these are not toxic to fish, birds, insects. Mammals and other species [...] the commercialisation of soyaRR is not expected to produce any adverse effects on wildlife.*' The reality is that the way the evaluations were carried out did not allow for the measurement of adverse effects on the natural flora and fauna. The report only considered introduced protein as a separate entity, without taking account of the genetic 'package' it contains, the modifications that the protein undergoes within the GM soya plant, nor that it relates to an independent genetic segment which is susceptible to mutations and other factors.

- Resistance to weeds: The report indicates that '*glyphosate is considered to be a herbicide with a low-risk of weed development [...]. Although there is no confirmation that resistance to glyphosate does not take place, the development of weed resistance to glyphosate is expected to be a rare occurrence as [...] plants and crops do not have a natural tolerance to this herbicide [...]. Glyphosate has many unique properties, such as [...] a lack of residual activity in the soil [...]. Resistance to glyphosate in whole plants or in cross-crop techniques has not been possible. Therefore it would be unusual if this occurred in nature under normal conditions*'. Since 1996, there have been reports from different countries of plants resistant to glyphosate. In Santa Cruz, of the 34 herbs related to soya crops, two have already developed symptoms of resistance to this herbicide: Santa Maria (*Flaveria bidentis*) and Chiori (*Amaranthus spp.*).

- Soya's ability to become a weed: The report points out that '*the introduction to glyphosate tolerance is unlikely to increase soya's ability to become a weed [...] even if such glyphosate-resistant weeds do exist [...] many other control methods would be available.*' Nevertheless, residual soya plants in conventional crops have become weeds and are commonly known as *soya soka*. According to farmers. They are hosts for various diseases and have a dispersal

³ The protein integrated into glyphosate-resistant GM soya.

range of up to 2 kilometres from their point of origin. Possibilities for controlling *soya soka* are reduced when weeding is carried out by hand or through the application of other highly toxic herbicides. Both of these options involve increased production costs.

In Bolivia, the approval process for GM soya experienced no obstacles during 3 government terms (those of J. Quiroga – 2001-2002; C. Mesa – 2003-2005; and E. Rodríguez Beltze – 2005). On the contrary, it was during these periods that the legal instruments were decreed to facilitate the free use and legalisation of soya, even though during and after this period, there were various protests because of the legal and technical weaknesses within the process. Because of this, one can conclude that the approval of GM soya in Bolivia was carried out in an arbitrary manner and that there was an irresponsible lack of coordination between the applicants and the government panels, as well as the subjugation of the underlying biosecurity policies to the interests of the soya industry.

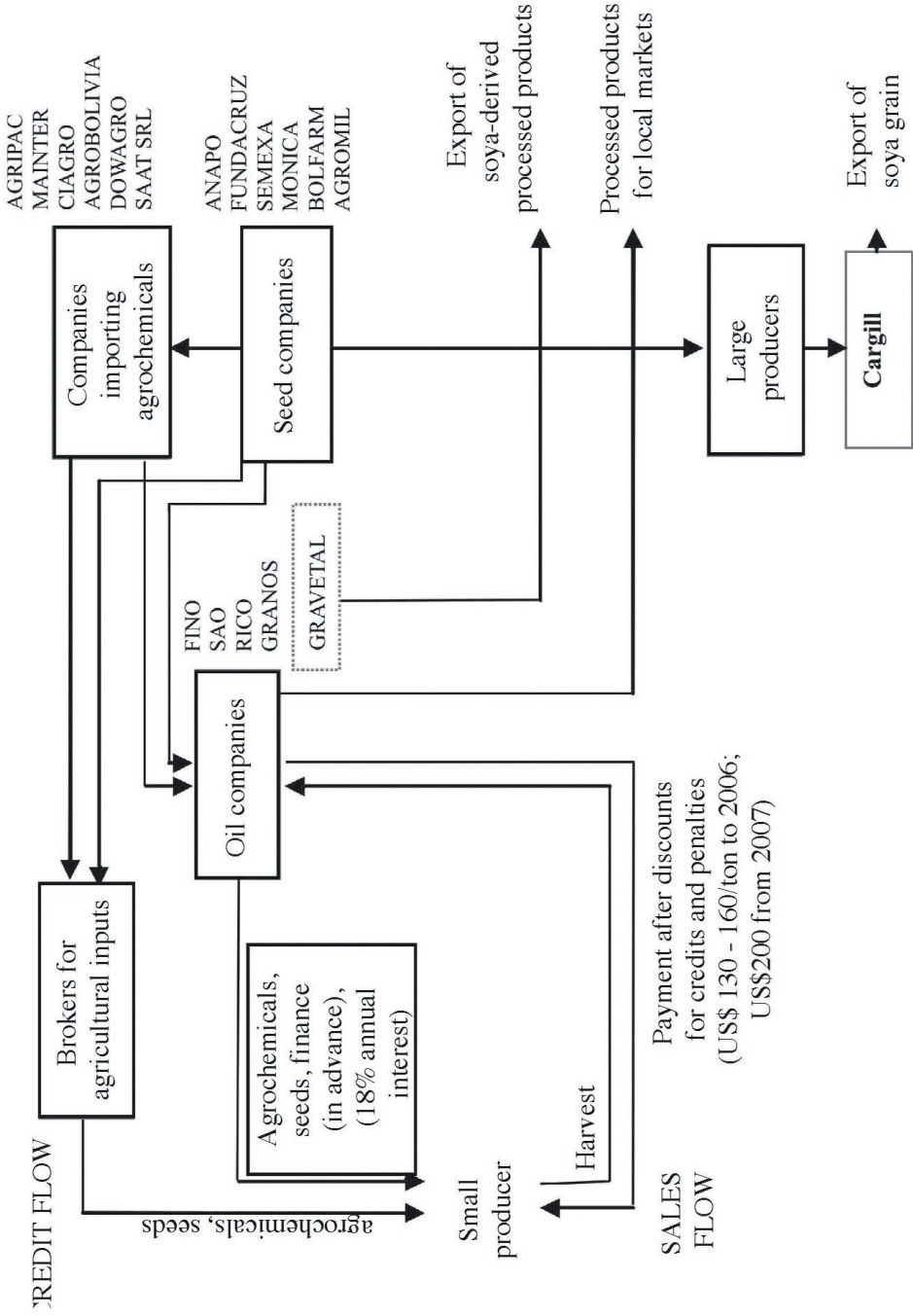
The soya chain: increasing debt for the small farmer

When thinking of soya production in Bolivia, one normally thinks of the eleven thousand small farmers immersed in this industry. But in reality, small producers are only in the limelight when two situations arise: 1) When the soya industry needs to project a caring image that takes account of socio-economic factors, and 2) When the soya industry needs cheap raw materials.

The soy chain in Bolivia is structured to work in such a way that, along with agro-industrial investors from the soya industry (such as oil refiners, importers of agrochemicals, and seed companies), it has become the creator of debts for small farmers. Figure 1 summarises the credit flows and the sales of soya harvest that determine this financial dependency.

The majority of Bolivian soya producers are small-scale farmers who own a maximum of 50 hectares. According to research and to the experience of the farmers, soya production is not profitable on small areas of land because of the high production costs that are, on average, US\$270 per hectare. As initial costs in soya production are high and small-scale farmers do not have enough money to pay for items up front, they are forced to take out loans from the companies importing goods through local agents or through the oil processing companies.

Figure 1. The flow of credit and sales from the harvests of small soya producers in Santa Cruz



The loans given by the agro-industrial sector of the soya industry are characterised by:

- Loans for goods have high interest rates: The loans obtained through agents or oil processing companies consist of goods, that is, herbicides and seeds. These loans are provided at an annual interest rate of 18%, charged on the calculated value of goods requested. In some cases, the oil companies also provide cash 'advances' on future payments for the harvested crops, but this also carries an interest rate of 18%.
- Guarantees with risks: Generally loans are available to farmers 24 hours after the application has been made (this is the main advantage of the credit system awarded by the agro-industry). The requirement for the loan is the provision of a mortgage guarantee for property (land, machinery, or a home, depending on the amount requested). In the majority of cases, as the land is the goods owned by a farmer, this acts as the guarantee. This contradicts Bolivian legislation that states that the smallholding is an integral heritage and cannot be seized, and therefore, technically, it is forbidden to mortgage this. To get around this, the smallholding is presented as a 'temporary guarantee' (with the oil companies) and in some cases there are 'fictitious sales with agreements for recovery' (with the agent of the agricultural loan brokering agencies). To this guarantee is included the condition of forced sale of the harvest to the loan company (the oil company) at prices stipulated by the company at the time that they purchase the grain.
- Discounts for the harvest: The harvest and the transportation of the grain is the financial responsibility of the farmer, and it is often carried out under the supervision of the agent from the company that provided the loan. This is so they can verify that all the harvest is destined for the credit company (as the agent receive a commission based on the volume of grain harvested as well as the goods sold). The harvest is transported to whichever silo the company directs and once it arrives it is checked for quality. There is a discount taken by volume equivalent to a penalty for excess damp, physical damage to the grain, or any impurity. Of the resulting net volume, a calculation is made of the payment due to the farmer (until 2006 purchase prices were between US\$ 130 – 160 /ton; in 2007 US\$200/ton). To this amount a deduction is made of the value of the loan and any interest due, and a US\$ 0.5/ton is taken as an obligatory contribution to ANAPO. Many small producers are unhappy with the contributions to this association, as ANAPO does not offer them any benefits. On the contrary, the farmers are sure that ANAPO has given preferential treatment to Brazilian producers in order to gain access to the Andean market, and they have left the small producer at the mercy of the oil processing companies and the agents.

In the majority of cases, the value of all the deductions is greater than the value of the harvest, and the farmer can only pay off part of the loan, leaving the remainder of the loan to be paid off at the next harvest. As, once more, the farmer does not have the funds to buy seeds for the next sowing period, he asks the same credit company for another loan using his smallholding and the sale of the next harvest as guarantee. This cycle of debt is repeated year upon year, and the soya industry's credit system ensures that the small farmer is in a permanent state of deficit.

This constant debt puts the small-scale soya farmer in apposition where it is impossible to pay off the acquired debts, obtain any other source of funding, and be free to dispose of his harvest and property as he chooses, as these are under the semi-permanent control of the credit company, and often at the risk of being lost altogether: 'Everything is acquired through loans [...]. That is the problem; that is why many farmers have been left stranded and have lost their machinery, lands and homes.' 'Some farmers have lost their land because they could not pay, because the costs of farming are very high. The first few years do not yield any profit. There is no produce! And even if there is produce, there is no profit. And then what is there to eat! The interest on the loan is consuming the people. Then you are forced to sell your smallholding, or the bank takes it from you.'

The introduction of GM soya has exacerbated the debt situation and the dependency of farmers. The introduction of the GM variety Tambaki in 2005, along with its resounding failure (productivity in the 2005/2006 harvest was 0.5 – 1.5 ton/ha, when conventional soya yields were 1.5 – 2.5 ton/ha) has affected the farmers' economy, not only by leaving many in debt to the oil companies by up to US\$30,000, but many have also lost their lands.

Even so, GM soya continues to be promoted and publicised extensively. ANAPO representatives insist that GM soya 'constitutes a fundamental tool for the reduction of production costs and an improvement in the levels of competition.' This definitely does not have any relevance to the situation experienced by small farmers, and is only relevant to the large growers and the agro-industrial sector. This became evident at the 3rd Soya Olympics (2007) in which the majority of the varieties were genetically modified (10 from the Eastern Zone and 8 from the Southern Zone). These are produced by private companies linked to the industrial production of oleaginous crops that have costly and contaminating technological packages which give productivity levels of up to 4.3 to 4.5

ton/ha. The purpose of these Olympics is solely the dissemination and commercialisation of technological resources for the production of GM soya.

The wager on GM soya made by ANAPRO and the private companies is about to bear fruit. Currently ANAPO and the private companies that have provided agricultural goods⁴, oil refiners⁵, research centres⁶ and public panels such as the Regional Seed Office – Santa Cruz, have formed a management committee to research and approve finances for the 'introduction of technological packages for the use of modern biotechnology in the cultivation of soya in the Department of Santa Cruz.' ANAPO has specifically developed a project proposal for the 'Genetic Resistance of Asiatic rust in soya.' The initial stage of this will be dedicated to the description and identification of soya-resistant germoplasm, the molecular description of the rust pathogens in Brazil, Argentina, Bolivia, Paraguay and Uruguay, and the creation of rust-resistant varieties: all this is evidence of a probable preamble to the next generation of GM soya in the Southern Cone.

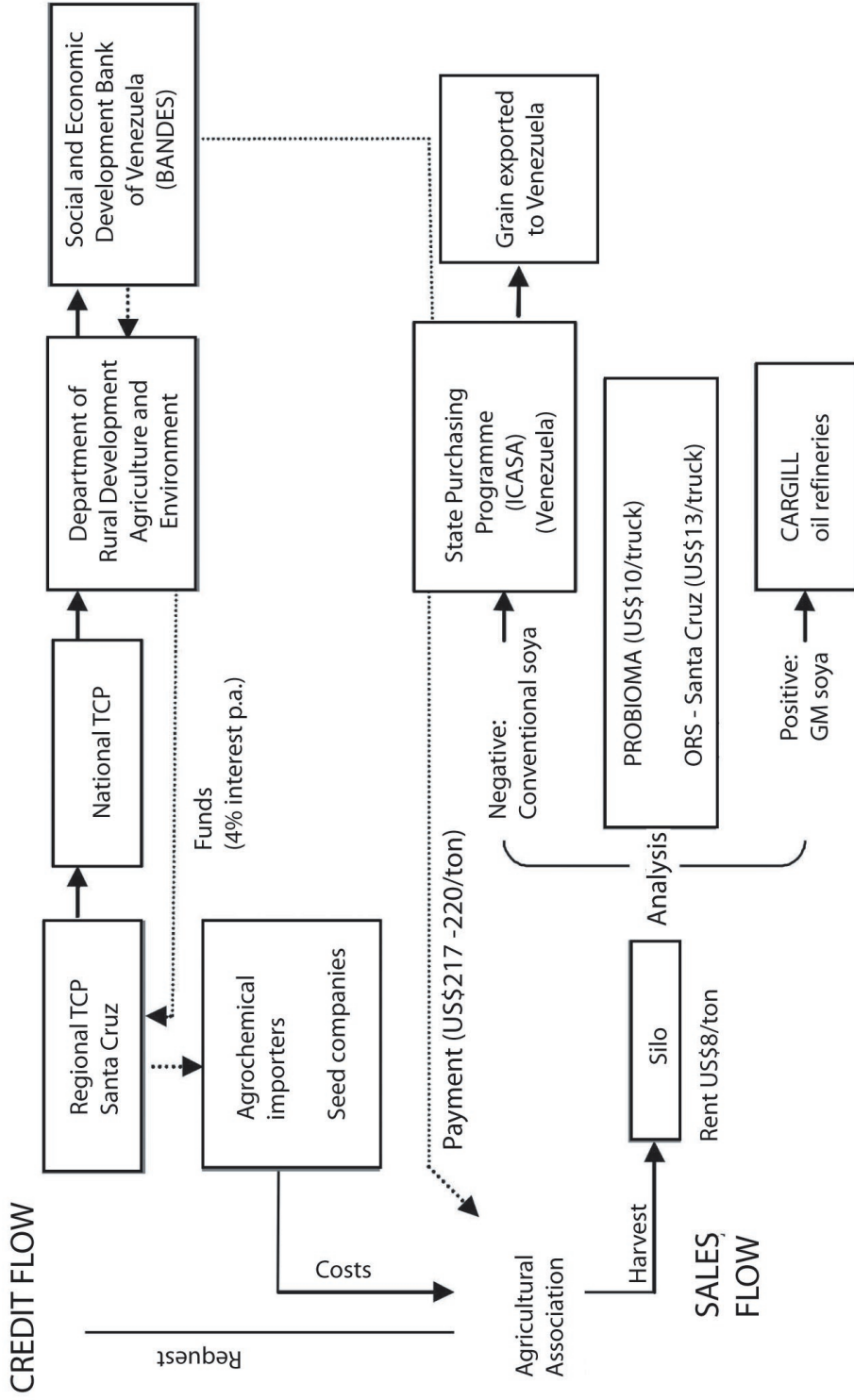
A campesino explains that *'soya production is very important: not for the small producer, but for the large companies... the middlemen. They will end up with the profits. The same happens with mineral mining. The small farmer will end up with the worst deal, with exhausted soils, and in time we will not be able to produce anything [...]'. The ones who are keeping all the profits are the large companies, the international merchants [...].'* The beneficiaries of today's soya industry are not the small farmers, but the large producers who own at least one thousand hectares of land in production (these constitute a mere 2% of soya producers), foreign producers who farm approximately 63% of the area dedicated to soya in Bolivia (dominated by the Brazilian community with almost 30% of the sown area), and the agro-industries and export companies (of which 4 out of 7 operate with foreign capital). The small farmer is relegated to the role of 'consumer' of agricultural goods and provider of cheap raw materials (grain). Because of the small farmers' debts, the soya industry continues to function and generate millions of dollars in royalties. These are not converted into the well-being or the improvement of living conditions for the small farmer, his family or his community.

⁴ The Association of Providers of Agricultural Goods, ABOSEMILLAS, FUNDACRUZ.

⁵ ADM, SAO, Aceite Fino, GRANOS, Gravelta Bolivia S.A., Industrias Oleaginosas, Camara de Industrias Oleaginosas de Bolivia (the Chamber of Commerce for Oleaginous Industries of Bolivia).

⁶ Centro de Investigacion de Agricultura Tropical (Centre for Research into Tropical Agriculture).

Figure 2. Credit and sales flows for the harvests of small soya producers in Santa Cruz with TCP



The Trade Treaty with the Nation (TCP): An option

Since 2005, the TCP has given rise to new sources of credit and the sale of Bolivian soya through the opening of the Venezuelan market for 200,000 tonnes per year (Figure 2). The basic criteria for access to this market are: 1) Soya has to be traditionally grown; 2) It has to be sourced from small producers farming an area of 50 hectares or less; and 3) The small producers should be organised into associations.

Some of the most significant advantages that TCP provides within the soya industry are of a commercial and structural nature:

- An improvement of sale prices. TCP pays US\$217 – 220 ton/ha for traditionally grown soya, that is, from 35 to almost 70% more than the purchase prices of the oil companies until 2006. This development has made the oil companies raise the prices they pay to the farmers to US\$200/ton (instead of US\$130-160/ton): 'We were very pressured by the agents because they would not let us go, because we had to sell to them. Now with TCP Alba [...] has opened the way. This is why the price remains high.'
- The beginnings of the break in dependency from the agents and the oil companies for the small farmer. With the winter 2007 harvest, the small farmers have been able to place up to 20% of their produce with the TCP. This percentage of their production means:
 - The beginning of a gradual 're-capitalisation' of the farmer, as this means that 20% of production is not subject to debts or sale agreements, but can contribute towards paying off the debts owing to the oil companies.
 - Availability of alternative sources of credit and sales with lower interest rates and better prices, breaking away from the oligopoly of the oil companies, the effect of which can be seen in the increase of soya prices.
 - The differentiation of traditional soya from GM soya. The demand by TCP for good quality soya has increased the level of information on the impacts of GM soya and has also shown that this type of soya carries the risk of closing markets.
- Strengthening organisations for small producers through associations that unite and represent them. To date the TCP has enabled the creation of almost twenty agricultural associations in the North and East Zones of Santa Cruz, bringing together around 2,000 farmers with approximately 6,000 hectares in production. This puts an end for the need of small farmers to deal with the oil companies 'on their own' and provides a real alternative through representation. ANAPO has not shown any interest in this.

Nonetheless, the TCP also have some problems. The most significant of these are:

- **The bureaucratic process of approving funding:** This is causing delays of up to two months to approve applications sent to the TCP regional office when this should only take ten days, as opposed to the 24 hours taken by the loans provided by the oil companies. Also, payments are delayed, and these have caused the farmers to go into debt temporarily to cover the costs incurred during the sowing season.

- **Issuing funds and goods through agents:** The TCP maintains its loan system through goods supplied by agents, that is, providers of agrochemicals and seeds who are contacted and contracted from the TCP's regional office in Santa Cruz. This makes it difficult for the farmers to have direct negotiations with the providers of the goods.

- **The dependence of large companies on goods:** The same companies that support the soya agro-industry of Santa Cruz provide goods (agrochemicals and seeds) for the TCP. In spite of attempts to produce and buy seeds from small farmers, it has not yet been possible to break off relations with the large agrochemical and seed companies.

- **Lack of infrastructure:** One of the greatest problems faced by the conventional soya growers is the lack of availability of their own silos in which to store grain destined for the TCP. This implies an additional cost (US\$8/ton), which is profit for the large companies that own the silos – the oil companies that control the oleaginous industry. Considering that in 2007 there were 800,000 tonnes of conventional soya sold, the oil companies received the equivalent of US\$640,000 for the use of their silos. The farmers are proposing that TCP provide funds for the construction of their own silos, to be repaid over 5 to 6 years.

- **Contamination of conventional soya by GM soya:** To date, reports state that 32% of soya destined for TCP has been contaminated. The principal causes of this are:

- Poor handling and separation of conventional and GM soya.
- Total or partial mixing of conventional and GM soya.
- Residual *soya soka* in the fields.
- Production of GM soya on neighbouring estates.
- Residues of harvested crops in harvesting equipment.

- Harvesting of adjacent plots with no clear boundaries.
- Remains of GM grains or seeds in transportation trucks.
- **A boycott of conventional soya:** The possibility of selling conventional soya to the TCP has meant a reduction in the soya offered for sale to oil companies, and a potential impairment to their supply. In order to guarantee their supply, the oil companies:
 - Sell unlabelled GM seeds.
 - Speculate with conventional seeds (*'as sometimes there are no conventional seeds to be found anywhere, it is better than growing nothing at all. You have to sow whatever you can find.'* The lack of conventional seeds is due to the *'seed companies pretending that conventional seeds are scarce so that GM seeds will be bought instead.'*)
 - Falsifying results of trials when grain arrives in the silos destined for Venezuela TCP.

- **Misinformation:** In many cases the farmer does not have the choice of which type of seed to buy, either because the agent company does not have the relevant information, or because the small farmer sows what the company give him through loans. In addition, there are still those within public panels who are responsible for providing information to farmers, but who have their own interests at heart. For example, the 2005 Annual Report for the National Seed Programme provides incomplete and misleading information on the certified varieties of GM seeds, and only mention one category as 'glyphosate-resistant', whilst other GM varieties, such as MO-250 and Tambaki are not specified as GM. Other GM varieties are difficult to recognise as they have similar names to conventional varieties.

In spite of these deficiencies, the TCP provides an option for the small farmer insofar as access to credit and sales. This emphasises a break in the dependency on the oleaginous agro-industrial sector and the development of farmers' organisations.

Dependency in a damaged environment

In 2006 the area sown with soya in Bolivia had grown to 950,000 hectares. That is a growth of almost 500% since 1991. In November 2005, ANAPO announced the cultivation of 200,000 hectares of GM soya. In the last few years, production has grown from 8% and exports have grown by 22%.

This increase in soya production has important environmental implications:

- **Deforestation:** The increase of the agricultural boundaries for soya cultivation has caused the deforestation of over 1 million forests in the last 15 years. This implies a rate of 60,000 hectares per year. In the Bolivian Chiquitania alone, 650,000 hectares have already been deforested for soya, with little respect for land use, protected areas or indigenous territories.
- **Soil degradation:** Bad management practices associated with soya crops, such as inadequate cultivation and chemical contamination, have already degraded 300,000 hectares of land. In addition, there have been changes in climate patterns, particularly those caused by deforestation, changes in biodiversity and the destruction of ecosystems.
- **The appearance of resistant weeds:** (*soya soka*, Santa Maria – *Flaveria bidentis* and Chiori – *Amaranthus spp*) which not only require more intensive applications of agrochemicals, but also the use of more toxic chemicals. These weeds are also related to the imbalances of native ecosystems.
- **Greater vulnerability to disease within soya crops:** particularly the Asian rust.

Monocultures of conventional and GM soya have a devastating effect on our ecosystems because of the technological packages applied to these crops. The exhaustion of soils within the Northern Zone of Integración (where large-scale soya production began) is a testament to the ecological damage caused by this crop. The exhaustion of the soil caused by soya has been one of the reasons for relocating this crop to the Eastern Zone.

Even though soya monocultures cause environmental damage, ANAPO is still planning to increase soya cultivation by an additional 500,000 hectares in order to reach 1.5 million hectares by 2013. Meanwhile farmers will have to increase their production costs to provide short-term temporary remediation for the environmental damage caused by soya production.

Soya: the *boom* that changed nutritional habits

With massive-scale soya agriculture there has been an invasion of soya-derived products in local markets, with the justification that soya provides a beneficial source of proteins. This *boom* has consequences relating to access and consumption habits:

- **A reduction in availability of local produce:** The expansion of soya

cultivation does not only cause the decline of forests, it also causes the decline of other crops which compete with it for land, particularly maize, yucca, rice, sugar cane, and even livestock such as cattle: *'Pastures are already being turned into sown fields (of soya). That is, the cattle are being reduced, and we won't be having much livestock in these parts.'* While the percentage of land occupied by soya has risen by 260%, other crops destined for local markets, such as maize and sugar cane have been reduced by 35% from 1990 to 2004. The reconversion of the land for soya production is causing a reduction in the quantity and variety of food available.

- **Massive-scale consumption and misinformation about soya-derived products:** There are a number of publicity campaigns for soya derivatives, particularly as a substitute for milk and as a source of vegetable protein. But these campaigns do not mention the precautions one should take when consuming soya-based products, as they have a high content of phyto-hormones affect the hormones and the immune system. It also contains anti-nutrients that inhibit the absorption of minerals, particularly calcium, magnesium and zinc. Societies that are not adapted to a regular consumption of soya are now convinced that this is one of the best substitutes for other foods without taking into account the risks, the agrochemical residues, or the fact it is genetically modified. They place their health at risk – particularly the health of the infant population - for the benefit of the agro-industry which promotes the production and consumption of soya.

Soya production: who benefits?

The extremes of the soya chain are the small producers and the consumers. They are the cogs in the machinery of the soya industry, as well as the ones who least benefit from the economic resources generated by this industry. The small farmer is subjected to a production system that generates commercial debt and dependency. The consumer pays for unsafe food that puts their health at risk and reduces their chances of having access to varied and healthy food. Even though the TCP are slowly positioning themselves as a fairer and strengthening option for farmers, the soya industry remains in the control of the large soya producers, the agro-industries and foreigners who grow fat on the resources generated by soya production, industrialisation and export, on the degradation and contamination of natural resources, on the debts of the small farmers, and on the uninformed consumption of soya and its by-products.

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