AGRICULTURAL POLICIES IN DEBATE

Market Opportunities for Agricultural Products under EUMETA

A Brazilian Perspective

NIELS SØNDERGAARD

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Introduction

At a time when multilateralism and international cooperation face deep challenges[1], the recent conclusion of the EU-Mercosur agreement stands out as an important step in the opposite direction. With the earliest phase of the negotiations initiated already in 1999, negotiations of the agreement have dragged out for decades. The agreement's conclusion has nonetheless created the world's largest interregional free trade area, encompassing more than 700 million people. For Mercosur, which until now has stood outside of many important value chains, the signature represents a unique opportunity for deeper global economic integration.

Agriculture is of central importance to the agreement. Europe has long been a highly closed market for this sector, which is viewed as extremely politically sensitive. This has been a recurrent point of contention for Mercosur countries, for whom agricultural exports play a critical role within their economies. The EU-Mercosur agreement is thereby important for these states, as it presents the prospects of increased agricultural market access in the EU. From a Brazilian perspective, the agreement is nonetheless still limited by remaining tariffs and Tariff-rate quotas (TRQ) on agricultural products of key significance. This raises important questions about the substantial gains provided by the agreement, and about the potential to increase agricultural trade with the EU in the future.

The EU-Mercosur agreement also goes beyond tariffs. This is particularly evident regarding sustainability-related issues, which are a key part of it. Within the field of agriculture, this both poses a risk that sustainability issues could become the object of disagreement, but also important opportunities for agro-environmental cooperation between the parties. On that background, it becomes crucial for European policymakers and practitioners to understand Brazilian perspectives on sustainability-related matters to better assess how positive-sum dynamics can be achieved through the rules and instruments embedded in the agreement.

This paper explores key issues related to market access and sustainability within the EU-Mercosur agreement to understand how they define the prospects for Brazilian agricultural exports to the EU market. Drawing on conversations with public officials

1 Albertoni (2025)

and Brazilian agribusiness leaders, which together represent a stakeholder sample with deep first-hand insights into the matter, this paper thereby seeks to provide a Brazilian perspective on the challenges and opportunities of the agreement. For this purpose, the analysis initially aims to understand how changes in tariffs, TRQs, and other trade-related points define Brazilian agricultural market access. Hereafter, the paper examines how specific clauses within the trade and sustainability chapter may provide preferential market access for products with a particularly strong sustainability profile, exploring the specific cases of cane-based ethanol and coffee. The paper concludes with the presentation of policy recommendations for how best to support Brazilian agricultural market access in the context of the implementation of the agreement. The goal is thereby to provide a constructive and timely contribution to how the EU-Mercosur agreement may spur positive outcomes in terms of increased agricultural trade and improved sustainability.

1. Market access – tariffs and TRQs

The EU-Mercosur agreement is expected to yield significant outcomes in terms of market access, mainly through tariff reductions and increased Tariff-Rate Quotas (TRQs). While many global regions saw substantial reductions in tariffs and TRQs from 1980 and onwards, trade between the EU and Mercosur countries still faces high tariffs, not least amongst the latter. The agreement is thereby expected to eliminate tariffs on more than 90% of bilateral trade[2]. For Brazil, specifically, the agreement is expected to eliminate more than 90% of tariffs on exports to the EU, and 76% of tariffs on imports from the EU over a 14-year period[3]. Overall, effective tariffs for Mercosur will fall from 11% to only 1% upon full implementation of the agreement, while they are expected to decrease from 4% to 2% in the EU. Some estimates thereby suggest an additional long-term increase of 40% in trade between the two regions[4]. However, for certain product categories amounting to approximately 10% of the total, tariffs would either remain at current levels or only be partially reduced. In the EU, this is the case for different agricultural commodities, many of which have received TRQs at levels close to existing trade flows[5]. These exemptions have been made due to the politically sensitive nature of these sectors. From exporters' perspectives, however, the remaining tariffs often apply to particularly important product categories, thereby constraining the agreement's potential gains. In the case of agriculture, highly competitive Mercosur producers will thereby only enjoy limited access to the lucrative European market.

Despite remaining barriers, market access concessions within the field of agriculture are still significant. Around 90% of agricultural tariffs are set to be liberalized over time, with non-sensitive products generally enjoying duty-free access. The agreement is expected to eventually eliminate approximately €4 billion in tariffs[6]. Immediate tariff eliminations within agriculture thus encompass 31% of Mercosur and 39% of EU tariff lines[7]. While Mercosur represents only a fraction of EU's total foreign trade, the bloc has an outsized

2 USDA (2021)

3 USDA (2026)

4 Campos et al. (2026)

5 Campos et al. (2026)

6 USDA (2026)

7 CNA (2022)

importance as a supplier of agricultural commodities[8]. This highlights the importance of closely mapping the agricultural tariff reductions and their expected effects within both blocks.

EU concessions on agricultural and fishery products fall into 39 different baskets, defining the specific modality of their liberalization. The most important categories for agricultural and fishery products are shown in Table 1 below:

Table 1 – Tariff regime liberalization for agricultural and fishery products (EU concessions)

Regime	Description	Tariff lines
0	Immediate liberalization	1004 (39% of total)
4	Liberalization in equal parts over a 4-year period	285 (11% of total)
7	Liberalization in equal parts over a 7-year period	370 (15% of total)
10	Liberalization in equal parts over a 10-year period	403 (16% of total)

Source: Adapted from CNA (2022)

Within agriculture, the agreement will have the immediate effect of eliminating 39% of tariffs on Mercosur exports to the EU, and an accumulated 50% within the first 4 years. After 7 years, this number will reach 65%, and more than 80% after 10 years. For Brazilian agricultural export to the EU, the tariff lines that will be eliminated within the first year of the agreement represent more than 70% of the total value. The agreement will reduce average EU tariffs on Mercosur agricultural exports from 16,7% to 3,6% by year 5, and 1,7% after 10 years[9]. Notably, some of the products that will continue to be subjected to high out-of-quota tariffs are beef, sugar, cheese, rice and poultry, which all are of key strategic trade interest to Brazil.

8 Campos et al. (2026)

9 CNA (2022)

Mercosur would also make significant concessions on EU food and agricultural exports, which is illustrated in Table 2 below:

Table 2 – Tariff regime liberalization (Mercosur concessions)

Regime	Description	Tariff lines
0	Immediate liberalization	423 (31% of total)
4	Liberalization in equal parts over a 4-year period	328 (24% of total)
8	Liberalization in equal parts over an 8-year period	265 (20% of total)
10	Liberalization in equal parts over a 10-year period	178 (13% of total)
15	Liberalization in equal parts over a 15-year period	48 (4% of total)

Source: Adapted from CNA (2022)

Agricultural market access concessions made by Mercosur to the EU encompass an immediate liberalization of 31% of tariff lines, and a liberalization of a further 24% within 4 years. After 8 years, this number reaches roughly 75%, with an additional 13% and 4% of tariff lines being liberalized, respectively, within a 10- and a 15-year period. Some EU agricultural exports to Mercosur that would be subjected to the largest reductions would be high value-added food and beverages such as wine, chocolate, olive oil, whiskey, canned peaches, biscuits and soft drinks, while a tariff-rate quota would be established for cheese[10].

The high protection of the EU agricultural sector means that Mercosur exporters mainly stand to gain increased market access through larger import quotas and lower intra-quota tariffs[11]. For some of the specific Mercosur agricultural export products which will remain covered by tariffs, TRQs have been established with specific rules for quota sizes, phase-in period and in-quota tariffs. While many of these commodities already are exported in large quantities to the EU, the agreement will guarantee that a larger share in the future will be able to enjoy duty-free market access (see Table 3).

10 USDA (2026); Bethman & Gracia (2022); Baltensperger & Dadush (2019)

11 Castilho et al. (2025)

Table 3 – Tariff rate quota reductions as part of EU concessions for selected agriculturalcommodities.

Product	Treatment	Existing Mercosur quotas in 2018 (tons)	New additional quotas (tons)	Phase-in period
Beef	Mercosur as a whole will receive an additional quota of 99.000 tons (55% chilled and 45% frozen) with an in-quota tariff of 7.5%.	46.076	99.000	5 years
Poultry	Will gain a 180.000 tons new quota, with a zero in-quota tariff.	331.084	180.000	5 years
Pork	Will gain a 25.00 tons quota with an in-quota tariff of Euro 83 per ton.	0	25.000	5 years
Sugar	Brazil's 180.000 tons quota becomes duty-free from the point when the agreement enters into force.	412.054	10.000 (Paraguay)	Immediate
Rice	A 60.000 tons quota with a zero in-quota tariff from the point when the agreement enters into force.	0	60.000	5 years
Ethanol	450.000 tons industrial-only ethanol phased in over 5 years, with a zero in-quota tariff from the point of entry into force of the agreement. 200.000 tons of ethanol for other uses to be phased in over a 5-year period with an in-quota tariff of 1/3 of applied European tariff.	0	650.000	5 years
Honey	A 45.000 tons new quota with a zero in-quota tariff from the point when the agreement enters into force.	0	45.000	5 years
Cheese	A new 30.000 tons quota to be phased in over 10 years with the in-quota tariff decreasing to 0% during the period.	0	30.000	10 years

Source: Compiled by the author based on EC (2026), USDA (2026), Bethman & Gracia (2022), Baltensperger & Dadush (2019).

Many of the TRQs conceded by the EU cover the animal protein sector, which constitutes a very sensitive and contested product category. Brazil stands to gain 42% of the new beef quota and could see a modest increase of 5-7% of beef exports to the EU compared to current levels. Pork and poultry exports are likely to grow approximately 20%[12]. The agreement also contains tariff reduction schedules for ethanol and sugar, which is expected to hold promising market opportunities for the highly competitive Brazilian sugar-cane production sector. In the case of most products, the new TRQs constitute only a small share of total EU consumption. Moreover, in some cases, such as beef,

12 USDA (2026)

EU exports already exceed existing quotas, which means that the impact on consumers and exporters is likely going to be limited. The ethanol sector could see a larger increase in exports, especially for industrial purposes[13].

Box 1 – Examples of tariff liberalizations

Beef — outside the TRQ

For 1 ton of fresh or chilled boneless beef (CN 0201 30 00) valued at €5,000, the EU's standard tariff combines a 12.8% ad valorem duty (€640) with a €303.40/100 kg specific duty (€3,034). The total customs duty is therefore approximately €3,674 per ton, equivalent to 73.5% of the value.

Ethanol — outside the TRQ

For 1 ton of Brazilian ethanol valued at €600, assuming the standard EU tariff of €19.20 per 100 kg, the customs duty would be approximately €192 per ton. Under the agreement, the applicable in-quota tariff for ethanol for other uses is reduced to one-third of the applied EU tariff, while industrial ethanol receives a zero in-quota tariff.

How quotas will be distributed among different Mercosur countries has not been decided by the time of writing. The most intensely discussed quota is that for beef. A Paraguayan proposal suggests an equal distribution (25%) amongst Mercosur countries. A different proposal defended by Uruguay and Argentina would define quotas based on existing beef exports, favoring those countries relative to Paraguay. An intermediary position is defended by Brazil, which currently appears most likely to prevail.

13 Bethman & Gracia (2022)

Projected sectorial impacts of the agreement

The EU-Mercosur agreement is expected to lead to increases in the trade flows of both blocs, albeit more substantial in the case of Mercosur, which so far has remained outside many trade agreements. So, while the agreement has been projected to lead to a 0.7% increase in exports and 0.1% increase in imports for the EU, Mercosur could see a 15% increase in exports and a 16% rise in imports[14]. The increase in Brazilian GDP by 2040 compared to a situation with no agreement would be approximately 0,46%, or US$ 9,3 billion, with investments potentially increasing by 1,49%[15].

As the largest agricultural producer within Mercosur, Brazil is likely to experience gains within this sector with the implementation of the agreement. Specific estimates vary, depending on the methods and models used to assess the commercial effects. Brazilian agricultural exports would benefit from three separate effects of lower EU tariffs, increased quotas, and cheaper production inputs increasing their global competitiveness. Data from Ribeiro et al. (2024) suggest that the accumulated impact of Brazilian agribusiness exports to the EU by 2040 could amount to US$ 6,2 billion, with the sector experiencing significant gains, as highlighted in Table 4 below:

Table 4 – Accumulated impact of the EU-Mercosur agreement on selected Brazilian agricultural exports from 2024-2040.

Product	Export value in US$ billion	%
Pork and poultry	2.57	16.8
Vegetable oils and fats	1.97	9.2
Beef	0.54	3.7
Beverages and tobacco products	0.45	6.7
Vegetables, fruits and nuts	0.05	3.1

Source: Ribeiro et al. (2024)

The agricultural subsectors experiencing an increase in exports would also see a noticeable rise in production value. This is particularly pronounced in the case of poultry and pork, which stand as the clear winners of the agreement, with an increase of more than

14 Timini & Viani (2021)

15 Ribeiro et al. (2024)

US$ 10 billion by 2040. Other subsectors, such as vegetable oils and fats, beef, beverage and tobacco products, and vegetables, fruits and nuts, would also experience modest increases in output, as can be read from Table 5 below:

Table 5 – Accumulated impact of the EU-Mercosur agreement on Brazilian agricultural production from 2024-2040.

Product	Increase in production value in US$ billion	In %
Pork and poultry	2.92	9.2%
Vegetable oils and fats	1.70	4.8%
Beef	1.18	5%
Beverages and tobacco products	0.76	1.8%
Vegetables, fruits and nuts	0.47	1.4%

Source: Ribeiro et al. (2024)

Of the increase of 2.0% in the total agricultural production value due to the agreement, roughly 75% is expected to be concentrated in the four sub-sectors of pork and poultry, other foodstuffs, vegetable oils and fats, and cattle[16]. This highlights the very distinct impact the agreement can be expected to have on the different agricultural sub-sectors, which, due to varying competitive positions and liberalization schedules, face very different market prospects to benefit from increased market access.

Safeguards

The EU has prioritized inscribing a safeguard mechanism within the agreement to protect European farmers from sudden import surges. In the case of an increase in imports of sensitive agricultural products above 5% of the average level during the preceding 3 years and in import product prices of at least 5% lower than in the EU, a safeguard mechanism may be triggered through which tariff quotas or other types of preferential measures can be suspended. From a Brazilian perspective, the EU's imposition of the safeguard mechanism constitutes a drawback for the agreement. The low threshold for its potential activation, as well as the significant remaining uncertainties about how this

16 Ribeiro et al. (2024)

could affect Brazilian agricultural exports, are among the key concerns. However, in a negotiation situation in which the safeguard mechanism, along with the limited tariff quotas for sensible products, appear to have been a point of crucial importance for the EU, the Brazilian strategic perception tended towards collecting whether gains could be made through the agreement. The limited extent of the market opening means that European farmers are unlikely to experience a substantial impact from the implementation of the agreement[17].

An important question related to the agreement also regards the question of whether it will be able to reduce and/or simplify the approximately 25.000 non-tariff measures (NTMs) that apply to imports of miscellaneous food products from Mercosur. The most significant NTMs affecting EU trade with Mercosur are technical, non-technical and export-related measures. Assessments of the level of these NTMs as ad-valorem equivalents (AVEs) suggest that they reach around 7,8% in the case of Brazilian exports[18]. Thus, it thereby becomes a key concern for Brazilian agricultural exporters whether the agreement will have the practical effect of lowering and/or facilitating existing European NTMs.

A strategic perspective on Mercosur market access

Throughout the EU-Mercosur negotiations, the Brazilian agribusiness sector was strongly in favor of an agreement, given its competitiveness, the substantial market barriers it faced in Europe, and the profitability of the EU market. However, during the negotiation process, it became evident to Brazilian stakeholders that European concerns related to agricultural subsectors considered to be particularly sensitive to increased competition imposed clear limits on potential gains. In its final version, the Brazilian perception that Mercosur had accepted quotas in exchange for tariff elimination thereby prevailed. The choice to accept the final agreement, despite the continuation of TRQs and the existence of safeguards, was made to collect whatever gains could realistically be obtained.

17 Bethman & Gracia (2022)

18 Bethman & Gracia (2022)

In a wider strategic perspective, a clear perception of the inevitability of the need to renegotiate quotas in the future thereby exists on the Brazilian side. The current terms of the agreement have also been viewed as a steppingstone to potentially securing future concessions. In this perspective, the modestly increased presence of Brazilian agricultural products on the EU market could help attenuate fears that competitive pressures would undermine European production in sectors such as animal protein. This would help pave the way for an eventual increase in quotas through a future revision or renegotiation of the agreement. Moreover, presence on the highly demanding EU market can also be viewed as a recognition of the quality of Brazilian products, which both serves to attenuate skepticism amongst European consumers and helps boost market access other global regions.

While economically important export sectors such as animal protein, rice and sugar will continue to face TRQs, many smaller agricultural subsectors have gained more immediate market access. In May 2026, the first zero-tariff container with fresh grapes was sent to Europe, representing a concrete outcome of the implementation of the agreement. Brazil produces many tropical products, such as fruits and nuts, as well as prepared foods, which by themselves represent a limited market, but in their aggregate could represent a substantial and increasing market share. An obstacle to increased exports of these products regards the EUs Novel Foods classification[19], which means that even widely consumed products in this category will have to undergo long and expensive test procedures to enter the EU market. For many small- and medium-sized Brazilian exporters, this may represent a prohibitive barrier to enter the EU market. Conversely, an aspect that could benefit Brazilian food and agricultural exporters is the potential establishment of processing industries in the country, with the lowering and/or elimination of existing tariff barriers. Examples of products which could benefit from this value-added include toasted coffee, frozen fruit pulp, animal feed, and ground nuts.

Finally, the EU-Mercosur agreement has at times been described as an "old" trade agreement, as its core components were established long ago, due to the prolonged negotiation process. Crucially, these negotiations mainly took place at the backdrop of a functional World Trading Organization (WTO) regime providing a baseline of predictability in the form of rules and norms defining trade practices. From a Brazilian perspective, the weakening of the global trading order raises serious questions about whether this will incentivize the adoption of measures by European countries which

19 Further specifications can be found at Novel Food - Food Safety - European Commission.

could restrict market access. Due to the politically sensitive nature of agriculture in the EU, as well as the salience of sustainability and sanitary concerns, there are concerns in Brazil that agricultural exports may be particularly vulnerable to such market-restricting measures whose justification or application could be contested. The agreement's success therefore appears to depend to a large extent on building mutual trust between the parties and establishing a genuine, shared commitment to increasing trade flows between the two regions.

2. Trade, environment and sustainability standards

Beyond tariffs and TRQs, the EU-Mercosur agreement also comprises other consequential rules. The agreement contains different reciprocity clauses which require Mercosur agricultural exports to comply with EU standards regarding the use of pesticides, food safety and animal health[20]. Another important point is the presence in the SPS chapter of the regionalization principle, meaning that in the case of an animal disease outbreak in a particular region, exports from other regions documenting the absence of disease can continue uninterrupted. Moreover, geographical indications are mutually recognized within the agreement. This has frequently been defended by the European Union, which provides a wide range of globally consumed high-end food products and beverages with a high value-added and strong brand of origin. Yet, Mercosur products will also benefit from geographical indications. Finally, the agreement includes the precautionary principle, meaning that in cases where suspicion of harmful impacts exists and scientific evidence is inconclusive, national authorities may suspend the use and sale of the product until further evidence is provided.

The Trade and Sustainable Development (TSD) chapter

The Trade and Sustainable Development chapter in the EU-Mercosur agreement came into being after prolonged negotiations between the parties. As it regulates issues of key interest on both sides of the Atlantic, the chapter strikes a balance between EU priorities of incorporating sustainability and environmental commitments into trade agreements signed by the Union, and Mercosur countries' concerns about averting unilateral trade protectionism and disguised protectionism. The chapter mentions the parties' commitment to multilateral environmental and labor agreements, while establishing mechanisms for the monitoring and implementation of these agreements. It is therefore highly relevant to the field of agriculture, as the rules and principles defined within the chapter have different implications for food production and trade.

20 USDA (2026); Castilho et al. (2025)

As stated in the initial paragraphs, the core of the TSC is to 'integrate sustainable development in the Parties' trade and investment relationship through a range of principles and actions related to labor and the environment (Art. 18.1, 1). The sustainability adopted highlights the 'economic, social and environmental dimensions of sustainable development' and their mutually interconnected nature (Art. 18.1, 3). The specific pathways envisioned for the promotion of sustainable development draw on parties' SDG commitments as well as existing labor and environmental standards (Art.18.1 4a), multilateral commitments (Art. 18.1 4b) and enhanced cooperation between the parties within this field (Art.18.1 4c). Being a common priority of countries in the Global South, the last point stresses 'taking into account the different national realities, capacities, needs and levels of development and respecting national policies and priorities' (Art.18.1 4c). In a similar vein, each country's right to determine policies, priorities and regulations within the fields of labor and the environment, as long as they are consistent with parties' commitment to international agreements, is emphasized (Art. 18.2). Moreover, the importance of progression towards increasingly strong regulations within this field is also underscored, and the use of such regulations for disguised and/or arbitrary discrimination is also disallowed (Art. 18.2, 6), reflecting a concern frequently expressed by Brazilian agricultural exporters. The multilateral commitments stressed within the agreement mainly relate to environmental agreements (Art. 18.5), trade and climate change (Art. 18.6), trade and biodiversity (Art. 18.7), trade and sustainable management of forests (Art. 18.8), and trade and sustainable management of fisheries and aquaculture (Art.18.9).

The TSD chapter also underscores the need to support environmental and labor protections with robust scientific evidence and relevant international standards and guidelines (Art.18.10 1). However, in cases when scientific information or evidence is deemed insufficient or inconclusive, and an associated environmental or occupational risk is believed to exist, the precautionary principle may apply (Art.18.10 2). This principle is key within European regulatory frameworks but has often been subjected to criticism by other parties, for example in relation to genetically modified organisms. Its presence within the agreement is a clear European priority, but also a point which might spur future controversies between its parties. Finally, the agreement also contains some positive incentives to foster sustainable development. Notably, it encourages 'trade and investment in goods and services as well as the voluntary exchange of practices and technologies that contribute to enhanced social and environmental conditions, including those of particular relevance for climate change mitigation and adaptation' (Art. 18.12 2b).

While the main text of the TSD chapter does not specify how to operationalize this intent, Annex 18-A elaborates further on this point, which is the object of analysis in the following part of this policy paper.

Sustainable products and market opportunities

Throughout recent years, sustainability and environmental provisions have increasingly become part of EU trade agreements with global partners. This also regards the EU-Mercosur agreement, where these issues have been key to discussions within the field of agriculture. European domestic constituents, such as farmers and environmentalists, have raised the issue of sustainability, demanding that the agreement does not undermine existing European standards or undercut competition[21]. Conversely, Mercosur countries have highlighted their existing environmental legislations and standards, but frequently also demanded that European clients combine sustainability demands with concrete economic incentives. Article 39 of Annex 18-A to the trade and sustainability chapter provides a more specific step in this direction, as it establishes the possibility for preferential or additional market access to the EU for specific forest-friendly products:

> "In order to harness the potential of trade for the benefit of ecosystems, the Parties will establish within a year of the entry into force of this Agreement a list of products from Signatory MERCOSUR States which contribute to the conservation, restoration, sustainable use and management of forests and vulnerable ecosystems. Products in this list, which shall be periodically reviewed every three years, should be granted preferential or additional market access, or other incentives by the European Union to promote their trade, such as technical assistance or capacity building."

While Article 39 does not specify which selection criteria will be used to define products under Article 39, it does present a general pathway towards definition of mutual agreement on this point. As such, it appears to respond to demands for the EU to use trade as an instrument to promote sustainable development through concrete material incentives.

The following Article 40 presents a similar aim to promote the trade in certain products, albeit according to a somewhat broader sustainability conception, which also potentially covers products from both the EU and Mercosur:

21 Bethman & Gracia 2022

> "Additionally, the Parties should put in place actions and measures to enhance trade in goods contributing to enhanced social conditions and environmentally sound practices, such as goods and services contributing to a resource-efficient, low-carbon economy, or goods that are the subject of sustainability assurance schemes and mechanisms. Such actions, to be periodically reviewed by the Parties every three years, may include measures to enhance market access, technical assistance, capacity building and trade facilitation, as appropriate."

Compared to Article 39, Article 40 presents a wider sustainability conception, as well as the broader range of potential measures to incentivize production and trade in these products. This has often been defended by countries in the Global South, which historically have been inclined to emphasize the economic and social pillars of sustainable development, compared to a relatively stronger emphasis by countries in the Global North on the environmental conservation dimension. With Articles 39 and 40, the main point in question nonetheless remains which selection criteria and sustainable products the parties can agree upon.

Selection criteria and important socioenvironmental factors

Since the early inception of the notion of sustainable development[22], the concept and its specific applications have been intensively discussed, - not least in relation to the field of agriculture. Most conventional definitions nonetheless converge around a conception encompassing social, environmental, and economic dimensions. A companion paper to this work[23] engaging with potential selection of potential products under Article 39 presents a list of specific criteria, which encompass economic, ecological, social and governance dimensions. These different categories encompass criteria related to livelihoods and employment, conservation, social inclusion and proper rules and certifications. The listed criteria established by Mensah & Rudloff (2026) thereby cover a broad scope of considerations through specific indicators, which can be assessed in relation to Mercosur agricultural products. So, despite varying conceptions about sustainability between and across EU and Mercosur countries, they nonetheless provide a point of departure for assessing how specific products may become candidates for preferential or additional market access under Article 39 and 40. The following sections analyze how

22 Brundtland (1986)

23 Mensah & Rudloff (2026)

these sustainability criteria apply to Brazilian cane-based ethanol and coffee production, while also assessing their market opportunities in the EU.

Brazilian cases of sustainable products: Cane sugar / ethanol

Sugar cane is a tropical crop which is extremely efficient in the conversion of sunlight, CO2 and nutrients into sucrose (sugar). Brazilian sugar cane production dates back about 500 years to the early days of colonization, when this crop was one of the most significant exports. Today, the country is the largest global producer, with an annual output of approximately 650 million tons. While historically, this crop has mainly been cultivated for sugar production, the energy crisis of the 1970s yielded innovations permitting the use of ethanol in car engines. Since 2003, the so-called "flex vehicles" capable of running on gasoline, ethanol, or blends of the two have been marketed to Brazilian consumers. As a large producer and consumer of ethanol, Brazil also has great strategic economic interest in increasing exports of this commodity. The EU-Mercosur agreement allocates a TRQ of 650.000 tons to Mercosur, to be phased in over a 5-year period, albeit with a remaining reduced in-quota tariff compared to ethanol imports from other global regions.

In terms of *economic sustainability* sugarcane and ethanol production provides a significant source of economic activity in different agricultural regions in Brazil, especially in the state of São Paulo. The wider value chain encompasses not only sugarcane production and its associated inputs, but also the conversion of sugarcane juice and molasses into ethanol, and the use of cane bagasse for electricity generation. In the direct use as vehicle fuel, ethanol and mixtures based on ethanol also present a competitive economic performance compared to gasoline, making it an attractive alternative depending on the relative prices of sugar and petroleum, respectively[24].

Assessing the *environmental performance* of sugarcane production is a complex task, due to the potentially relevant factors and variables to be considered. With regards to Brazilian agriculture, many sustainability discussions frequently revolve around deforestation, particularly in the Amazon region. The heartland of Brazilian sugar cane production, centered in the states of São Paulo, Minas Gerais, Mato Grosso do Sul and Goiás, is nonetheless located around 1500 km from the Amazon biome. Moreover, sugarcane

24 Luo et al. (2009)

production has not been a strong driver of deforestation, as it mainly has expanded on degraded pastures[25]. In terms of direct production impacts, room for improvement will largely depend on the adoption of good practices regarding water management, the elimination of straw burning in the fields, avoidance of topsoil erosion, protection of local biodiversity and ecosystems, and less use of chemical fertilizer[26]. Regarding the performance of cane-based ethanol as a vehicle fuel, GHG emissions reductions which can be obtained from the substitution of gasoline by ethanol are substantial, and lifecycle GHG emissions reductions of up to around 80% compared with gasoline have been estimated[27]. The development of second-generation ethanol, which uses lignocellulosic biomass such as sugarcane bagasse and straw, offers further potential for improving the environmental performance of ethanol production[28]. Compared to the more artisan Indian sugar cane sector, Brazilian ethanol production has been associated with lower GHG emissions, with 0.036 CO2 eq/kg cane compared to 0.045 CO2 eq/kg cane. The main source of remaining emissions from Brazilian cane production are energy use, soil agrochemicals and burning of fields[29]. Thus, faced with the backdrop of the need for rapid decarbonization of liquid fuels within hard-to-abate sectors such as civil aviation, maritime transport and certain industrial processes, Brazilian ethanol presents a potentially important sustainable alternative, granted that good production practices are adopted and cutting-edge innovations implemented, such as those related to second-generation biofuels.

Within the *social dimension* of sustainability, the ethanol sector has seen developments in recent decades. Historically, sugar cane was harvested manually with the use of low-wage labor. This often raises problems related to exhaustive and degrading working conditions, some of which have persisted into the 21st Century[30]. However, in recent decades, the mechanization of cane harvesting has changed that situation, as a smaller but more technically skilled workforce has been needed. This has also meant that attention has been redirected towards the process of incorporation of workers into the industrial cane/ethanol production complex[31]. With the fundamental changes in

25 Bordonal et al. (2018)

26 Duarte et al. (2013); Bordonal et al. (2018); Pereira & Ortega (2010); Ometto et al. (2009)

27 Luo et al. (2009)

28 Maga (2019)

29 Tsiropoulos et al. (2014)

30 McGrath (2013)

31 Carillo (2016)

the type of labor within sugar cane production, the challenge becomes to guarantee technical qualifications of workers, and that labor rights and decent working conditions are extended across the sector.

The *sustainability governance* of the Brazilian cane-based ethanol value chain is covered both by voluntary private certifications and public legislation, depending on the specific jurisdiction in question. Some of the most important private multistakeholder initiatives are *Bonsucro* and the Roundtable on Responsible Biofuels, which both cover a range of social, environmental and governance-related sustainability criteria[32]. Apart from the initiatives, public legislation also applies both in Brazil and in the EU. Moreover, Brazil's national biofuel governance programme, *RenovaBio*, also emits certifications of ethanol producers according to lifecycle carbon intensity and biomass eligibility, which can make them eligible to issue decarbonization credits (CBIOs). The Brazilian Forest Code constitutes an important legislative framework targeting mainly land-use by guaranteeing mandatory conservation on private properties. Brazilian labor legislation also provides an important baseline for social compliance within the field. On the EU side, the Renewable Energy Directive (RED) establishes a range of sustainability criteria applying to ethanol imported by the Union, which encompass elements related to land-use, GHG emissions, biodiversity and traceability.

Brazilian cases of sustainable products: Coffee

Historically, coffee has had large economic significance in Brazil, shaping both domestic politics as well as the country's ties to the international economy. Brazil has long been the world's largest producer of this crop and currently accounts for around a third of global output. Brazilian coffee production was long subjected to significant supply regulation and price controls through marketing board policies. With the breakdown of the international coffee agreement in 1989, the sector underwent significant deregulation and was increasingly exposed to international price fluctuations. Traditionally concentrated in the states of São Paulo and Parana production has increasingly moved towards the states of Minas Gerais and Espíritu Santo, and more recently, also Bahia and Rondônia.[33] The two most common coffee species in Brazil are arabica and canephora (robusta). Today, most Brazilian coffee exports are destined

32 Benitez-Lazaro et al. (2018)

33 Volsi et al. (2019)

for the United States, Germany, Italy, Belgium and Japan. In 2025, Brazil exported 41,9 million coffee bags, amounting to a total value of US$ 16,1 billion – a historical record[34]. The same year, Germany became the largest global buyer of Brazilian coffee as the Trump administration drastically elevated tariffs on Brazilian exports to the United States. The coffee trade between Brazil and Germany has deep historical roots, and a large German processing industry exists, adding significant value to imports through the production and exports of instant coffee and speciality blends.[35]

Within the *economic sustainability* dimension, although other agricultural products have surpassed it as the most important items within the country's export basket, coffee still plays an important economic role within the country. Production occupies around 2 million hectares and involves approximately 300.000 producers. The wider coffee value chain in Brazil generates more than 8 million jobs, providing an important source of income sustaining livelihoods for a large number of workers[36]. Most producers are organized through cooperatives and associations, such as *Cooxupé*, which is the largest coffee cooperative in the world. Coffee processing is nonetheless marked by a highly concentrated market structure, with 10 companies accounting for around 75% of the output[37]. While family-based smallholders still constitute a large share of production, especially medium-sized producers have often been squeezed by the growing capital requirements and fluctuating prices[38]. Lacking investments in innovation and modern equipment and machinery, as well as low training levels, constitute substantial challenges to these producers[39]. Specialty coffee brands can provide an additional source of income for producers. However, in order to access this market, many producers face barriers related to postharvest infrastructure, certification and traceability[40]. With the gradual phase-out of EU tariff barriers on roasted and decaffeinated coffee over a 5-year period, a significant potential emerges for substantial value addition to coffee products by fostering these processing activities in Brazil. Organic coffee also constitutes an opportunity for value-capture by producers, but challenges exist in the form of marketing, lacking product

34 Conab (2026)

35 Kreimeier & Rose (2025)

36 Guimarães et al. (2022)

37 Almeida & Zylberstjarn (2017)

38 Almeida & Zylberstjarn (2017)

39 Santos et al. (2023)

40 Sera et al. (2025)

standardization, manpower and low yields[41]. Comparisons between conventional and certified systems in the Brazilian coffee sector show that both display a general potential for positive economic performance: the former scores higher in terms of profitability, production stability and value creation, while the latter scores higher in terms of food safety, quality, and risk management[42].

In the *environmental sustainability* dimension, there is a growing interest amongst producers in engaging in this issue, but still a lack of knowledge about how to define and implement such practices[43]. Strategies relying on agroforestry, intercropping and soil conservation have been found to improve environmental performance, and could justify a premium price on international markets[44]. In some instances, coffee production has been scrutinized for its impact on native vegetation as a driver of deforestation. However, in Brazil, productivity increases have meant that since 2000, the total production area has decreased while production outputs have risen[45] - a trend which also can be identified within other agricultural sub-sectors. In terms of emissions, life-cycle analyses comparing conventional and certified sustainable coffee point to a significant difference of 14.61 kg CO2e kg for the former against 3.37 kg CO2e kg of the latter. However, it is worthwhile noticing that most of the difference between the two is due to the elevated emissions from air freight transport, which alone constitutes 72% of emissions of conventional coffee[46]. Hence, both production modalities thereby represent emissions of approximately 3-4 kg CO2e kg. Other comparisons between certified and conventional production systems also find that certified systems score higher on most parameters, namely water and soil quality, genetic and species diversity and waste reduction[47]. Some producers adopting best practices with the effect of retaining large amounts of soil carbon have even been found to be CO2 net-negative[48].

41 Wegner et al. (2013)

42 Winter et al. (2020).

43 Guimarães et al. (2022)

44 Martinez et al. (2022).

45 Volsi et al. (2019, p.5)

46 Nab & Maslin (2020)

47 Winter et al. (2020)

48 Imaflora (2024)

The *social sustainability* dimension provides a more mixed picture when comparing conventional and certified systems. Certified production systems thereby score significantly higher on issues such as non-discrimination and gender equality, support for vulnerable populations, public health, and capacity development. This is mainly because certified cooperatives emphasize awareness-building about these issues among producers. On the other hand, conventional production systems score higher on employment relations, rights of suppliers and freedom of association, mainly because producers in this segment generally adopt long-term labor contracts structured according to Brazilian legislation compared to certified producers who rely more on family labor[49]. However, challenges remain with regard to temporary work, low wages, the high age of producers and family succession[50].

Different *regulations and certifications* apply to the Brazilian coffee sector. In similarity with cane production, the Brazilian Forest Code regulates land-use and conservation related-aspects, while Brazilian labor legislation provides a baseline of public law within this area. Coffee is also defined as a forest-risk commodity under the EUDR regulatory framework, meaning that Brazilian producers will have to provide information about land-use change, legal compliance and a due diligence statement to enter the EU market. Among private voluntary regulations, the most prominent are 4K, which cover a number of points related to environmental management, labor conditions, good practices and traceability. Moreover, Fairtrade, Rainforest Alliance and the *Certifica Minas Café* – specific for the Minas Gerais State – also cover part of the production. Studies of Brazilian coffee certification landscape have nonetheless pointed to a disconnection between efforts demanded by producers and the effective compensation they receive for sustainability compliance[51]. Aligning incentives across supply chains to ensure that producers reap some of the financial benefits and sustainability premiums thereby stands as an important task.

49 Winter et al. (2020)

50 Santos et al. (2023)

51 Rocha et al. (2025)

A strategic Brazilian perspective on trade and sustainability

Sustainability stands at the heart of the EU-Mercosur agreement and has thereby become essential to defining market access. The agreement thereby goes beyond regulating products based on their physical characteristics, as it adopts a strong process-based regulatory focus, including a variety of sustainability-related principles and standards. The definition of specific criteria and parameters for what can be considered as sustainable products can determine whether and how provisions such as articles 39 and 40 will lead to effective results for Brazilian exporters. The current formulation of these articles nonetheless raises two important open questions related to how forest-friendly products should be understood, and what preferential treatment means in concrete terms. From a Brazilian perspective, if no progress is made with regard to the facilitation of approval of novels foods, gains from increased market access could be very limited. In that case, complex regulations and costly approvals for EU market access could eventually favour large-scale producers relative to smallholders. In this regard, a crucial point regards whether meaningful progress can be made with respect to harmonization, as well as the necessary technical cooperation to promote this, stipulated in the agreement.

Beyond the definition of specific sustainability criteria and regulations, a wider issue relates to the fundamental premises and sustainability conceptions that undergird rule-making. While European ideals of sustainable agriculture often appear to favour small-scale establishments with low-input and/or organic production models, Brazilian idealizations often emphasize large-scale production with intense application of ag-tech sustainability solutions. The Brazilian government and FAO focus on increasing productivity per hectare rather than expanding agricultural land as a sustainability strategy, thereby reducing pressure to convert native vegetation. Brazil will therefore be more inclined to defend the inclusion of bulk-commodities such as sugarcane ethanol and cotton within the list of products eligible under articles 39 and 40. In that regard, the EU and Brazil also appear to diverge on the issue of biofuels, namely, with respect to different perceptions of the food-for-fuel dilemma. Thus, while cane-based ethanol does not compete directly with essential stapples used for human consumption, Brazilian corn-based ethanol production has also increased in recent years. In this regard, Brazilian arguments that ethanol is a byproduct of the use of corn as animal feed, and that the rapidly growing production in recent years means that there is no direct competition with human food consumption appear to diverge from predominant EU positions. The growth of different types of biofuels from soy, sugarcane and corn is often framed

by Brazilian stakeholders as an important contribution to decarbonization, especially due to their potential use in vehicles, containerships and in aeroplanes as Sustainable Aviation Fuel (SAF). Discussions about this issue are likely to intensify in the coming years, especially if the agreement leads to closer connections between the EU market and the Brazilian feed-fuel-animal protein complex.

Key points

- After prolonged negotiations, Mercosur countries eventually accepted the European proposal on market access, despite its limited concessions within the field of agriculture, seeking to reap the achievable gains.

- Brazilian agriculture stands to benefit from the EUMETA in terms of both exports and an increase in production value. However, gains are mainly concentrated in specific subsectors, such as animal protein and vegetable oils and fats.

- In a global context in which the rules-based trading order faces serious challenges, Brazilian concerns relate to whether both parties will demonstrate a mutual commitment to the agreements essential goal of increasing trade flows, raising the need for a close dialogue on the conditions for the application of potentially trade distorting measures.

- The relatively limited EU market access gained by Mercosur agricultural exporters due to remaining tariffs and TRQs on key products will in the intermediate term likely motivate discussions about gradually increasing quotas and lowering tariffs further.

- The inclusion of safeguards is viewed with concern by Mercosur countries and is likely to motivate efforts to specify the conditions for their application, restricted to situations of absolute emergency.

- Existing EU regulations for novel foods will likely impose a significant financial burden on exporters, thereby constraining the entry of new forest-friendly socio-biodiversity products.

- The TSD chapter contains several provisions related to process-specific characteristics of traded products. These provisions are meant to ensure that environmental and labour standards are upheld but can also lead to intense discussions about their practical application.

- Predominant sustainability conceptions held, respectively, by Brazilian and European stakeholders within agriculture vary substantially. This can lead to frictions but should also foster a constructive dialogue about alternative pathways to obtain desired social and environmental outcomes.

- Promoting a dialogue on how existing public and private standards can be used to demonstrate compliance with articles 39 and 40 in Annex 18-A could help pave the way for their practical implementation.

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