

EU–MERCOSUR FREE TRADE AGREEMENT

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‘These agreements are not only commercial in nature but also reflect Europe’s broader geopolitical strategy in a time of global instability.’ – Renewable Matter, 2025

Executive Summary

The Southern Common Market – or Mercosur in Spanish – is a South American trading bloc established in 1991 made up of five full members (Argentina, Bolivia, Brazil, Paraguay and Uruguay), one suspended full member (Venezuela), as well as several associated countries. The European Union (EU) is on the other hand the second-largest economy in the world as a bloc, comprising 27 member states.

If approved, the proposed economic agreement between the EU and Mercosur would be the largest tariff reduction package in EU history. It would also provide Europe with a crucial counterbalance to both United States (US) trade restrictions and Chinese supply chain dominance, as China represents 27% of Mercosur’s imports compared with the EU’s 17%, as of 2023 (Grieger, 2025, p. 3). Aside from economic impacts, the potential agreement is furthermore considered ‘a radical shift with unprecedented commitments to the fight against climate change, including deforestation’ (Publications Office of the European Union, 2025a).

The EU–Mercosur draft agreement aims to create gradual trade liberalisation with safeguards. It will not just reduce tariffs but also act as a political framework to balance competitiveness, agricultural and industrial interests, alongside environmental concerns. It is a tool against protectionism, revitalising Mercosur’s regional role and raising its member countries’ regulatory standards (Canal E, 2025). In statistical terms, the agreement will bring together two of the largest economic blocs in the world. Mercosur and the EU represent approximately 718 million people (10% of the world’s population) and a gross domestic product (GDP) of close to €20.5 trillion (Ministério das Relações Exteriores, 2024). This agreement will also eliminate 91% of tariffs imposed on EU exports to Mercosur, saving more than €4 billion annually (CEOE, 2025). In addition, the agreement could increase EU annual exports to Mercosur by up to 39% (€49 billion), supporting more than 440,000 jobs across Europe (Directorate-General for Communication, 2025).

The draft agreement will finally also protect 344 EU products with geographical

indications (GIs) (Directorate-General for Communication, 2025). For both blocs, the most sensitive sectors would be protected through long transition periods or exclusions. On the one hand, the EU – as Mercosur’s largest trading partner – gains access to raw materials, energy (ethanol, biodiesel), food, as well as competitive agricultural products from Mercosur. The EU will also be able to export more automobiles, machinery and alcoholic beverages. On the other hand, Mercosur will access a market with high purchasing power, offering opportunities in agribusiness but also facing competition in industrial manufacturing.

Proponents of the free trade agreement (FTA) thus argue that it provides an opportunity to strengthen internal integration, uphold rules-based multilateral trade and mitigate the increasingly asymmetric nature of Mercosur’s economic relationship with China (Grieger, 2025, p. 3). Yet it must be noted that the agreement has been controversial, leading to the separation of the political agreement from an ‘interim trade deal’ which would require only a qualified majority and not all member-state governments’ approval for ratification, a move labelled ‘anti-democratic’ by civil society (Changoe, as cited in CAN Europe, 2025). Given this controversy, it remains to be seen when and in what form the final agreement will be fully ratified. As late as December (at the time of writing), France continued to voice its opposition on agricultural protection grounds (AFP, 2025b), with more recent support for France against the trade deal from Italy (News Agencies, 2025). While the future of the agreement remains uncertain, the following report will analyse the draft agreement and the significance of its provisions.

Context of Negotiations

Timeline table

Date	Event
1992	First interregional cooperation agreement signed
1994	Two-phase strategy aimed at first establishing a cooperation framework introduced
April 2000	Formal negotiations started
2004	Negotiations ceased due to disagreement on agricultural liberalisation
2010	Negotiations relaunched with an enlarged EU amid the broader stalemate of the Doha Round
2012	Talks stalled again following internal tensions within Mercosur (Paraguay's suspension and Venezuela's accession)
2016	Negotiations resumed with new governments in Brazil and Argentina, following exchange of market access offers
28 June 2019	Commercial agreement concluded
2020	Political agreement concluded
2023	The EU proposes a 'Joint Instrument' to strengthen Mercosur's sustainability commitments
6 December 2024	Second political agreement concluded
2025 (ongoing)	Legal review, translation and submission to the Council of the EU for signature and ratification currently pending

Although some member states, such as Spain (Reuters, 2025), originally anticipated the agreement could be ratified by the end of the year, the precise timeline remains uncertain, as full implementation of the deal requires the ratification of all EU member states. At the time of writing in late-December 2025, France's finance minister had continued to label the agreement 'not acceptable' for the country's farmers (Lescure cited in AFP, 2025b). Indeed, more recent unification between France and Italy against the current form of the deal and provisional concessions being made to allay EU farmer concern has prompted Brazil's President Luiz Inacio Lula da Silva to warn the deal may fail altogether (News Agencies, 2025). At the time of writing, the situation continues to develop – with thousands-strong farmer-led protests in Brussels (Dumitrescu, 2025) and subsequent reported delays for the decision until January of next year (Dönmez, 2025).

Timeline discussion

Notwithstanding questions surrounding the eventual full ratification of the agreement at the time of writing, it is worth exploring both blocs' initial motivations in pursuing negotiations.

On Mercosur's side, one factor that facilitated this agreement include its countries (except Paraguay) no longer benefiting from the Generalized Scheme of Preferences (GSP) scheme since 2014 due to their subsequent classification as high middle-income countries (MercoPress, 2012). More generally across the world, the rise of unilateralism and protectionism under the US' 'America First' strategy since 2017 has posed serious challenges to the multilateral trading system (Grieger, 2025). In addition, uncertainties stemming from the US–China trade war, the imminent departure of the United Kingdom (UK) from the EU via Brexit, as well as electoral dynamics in both the EU and Mercosur countries in 2019, created a window of opportunity.

In statistical terms, Mercosur – with 270 million people – provides €84 million worth of EU exports annually, €388 billion of EU investment stocks annually (as of 2023), and is the sixth-largest economy outside the EU (with an annual GDP of €2.7 trillion). More than 30,000 small EU companies export to Mercosur, while EU exports to Mercosur support 756,000 EU jobs (Publications Office of the European Union, 2025a, p. 2).

In terms of the balance of power during the negotiations, the EU's greater economic weight, extensive investment ties, agenda-setting capacity, institutionalised negotiation framework and ability to impose trade and sustainability conditions granted it a stronger bargaining position. However, 'stronger' does not imply that the EU has exercised unilateral control. Mercosur's leverage, particularly its abundance of natural resources, such as critical raw materials essential for the EU's green transition, together with the internal requirement for consensus among EU member states for ratification, has arguably served to moderate and constrain the EU's demands.

Significant criticism of the agreement has also arisen from both sides. On the one hand, several EU member states, mainly France, have expressed concerns over the potential influx of cheaper agricultural imports from Mercosur countries, which could undermine European farmers and lead to a perceived relaxation of production and safety standards in comparison with European norms (Katanich, 2024). Agriculture has been a historically important sector for the EU to protect in its trade relations.

On the other hand, some critics have highlighted the absence of legally binding and effectively enforced sustainability and climate provisions (SustainCase, 2024). Particular concern surrounds issues such as deforestation (especially in Brazil), increased greenhouse-gas emissions, biodiversity loss and livestock expansion linked to agricultural growth (Pena-Boquete et al., 2024). In a similar vein, some observers see the agreement as a neocolonial instrument arguing that it primarily benefits European industrial exporters while offering weaker gains for Mercosur countries in terms of job creation, value-added manufacturing and economic diversification, thereby reinforcing their dependence on raw-material exports (Middeldorp et al., 2022, p. 4).

Notable Features and Provisions of the FTA¹

Chapter 2: Trade in goods

The draft agreement does not prevent a country from maintaining or establishing a State Trading Enterprise (STE) to import or export goods. However, according to **Article 2.10**, if a country requests information on specific cases of these enterprises, their operations, or the impact of their activities on bilateral trade, the other country must be fully transparent. This enables oversight to ensure STEs do not distort trade unfairly, helping to maintain trust between parties and fair commerce (CIRCABC, 2025a, p. 26).

What is particularly innovative is that regulation of STEs is included directly within the Trade in goods chapter, rather than in a chapter on investment or state enterprises, like in the Canada–EU FTA (Directorate-General for Trade and Economic Security, 2017). This links goods liberalisation directly with institutional regulation of state-controlled companies, thereby effectively combining flexibility with responsibility.

Similarly to Article 2.10, **Article 2.12** stipulates that parties must annually exchange information on imports benefitting from the agreement. This process begins one year after the agreement enters into force and continues until ten years after all tariffs have been eliminated. If the Trade Committee decides otherwise, the period is automatically extended for an additional five years and may be extended if necessary. Data in the exchanged information must include statistics for the most recent year available, covering import value, volume (if applicable) and tariff line level. Both goods that benefited from preferential tariff treatment and those that received non-preferential treatment must be included. This mechanism ensures transparency and monitoring, assesses the impact on different sectors, and provides the Trade Committee with information needed for future decision-making (CIRCABC, 2025a, p. 27).

¹ Please note that the following sections discuss the draft versions of the agreement's chapters, as accessible via the European Commission's Communication and Information Resource Centre for Administrations, Businesses and Citizens. Full details can be found in this report's reference list.

Chapter 6: Sanitary and phytosanitary measures

Chapter 6 of the draft agreement states any product entering the EU market must comply with EU sanitary and phytosanitary (SPS) standards. In setting these conditions, the agreement will help address antimicrobial resistance, promote animal welfare standards and reinforce the flow of information to keep unsafe products out of the market (Publications Office of the European Union, 2025a, p. 2).

Article 6.7 of this chapter also removes unnecessary barriers to export of animal and plant products while ensuring safety through science-based measures (CIRCABC, 2025c, p. 118). These measures include: risk assessments; audits of third countries; and strict controls both at the EU border and within the EU market (CIRCABC, 2025c, pp. 134–6). Controls meanwhile cover: documents and identity checks (such as product marks, stamps and other required information); as well as physical inspections (such as sampling products for harmful microorganisms or illegal contaminants, checking the means of transport, and verifying the health and fitness of animals being transported).

The precautionary principle is not explicitly mentioned but **Article 6.11** permits the adoption of provisional sanitary and phytosanitary measures when scientific evidence is insufficient. These measures must be based on the best information available and reviewed within a reasonable time to reflect updated scientific knowledge (CIRCABC, 2025c, p. 129).

The SPS chapter is significant because – as discussed in the context section of this report – it has led to serious concern about the potential lowering of EU standards, given the possibility that some Mercosur members may not fully comply with certain SPS measures (Pucheta et al., 2020, p. 4).

Chapter 10: Trade in services and establishment

The draft agreement addresses some barriers hitherto faced in trade of telecommunications, finance and transport services (Reuters, 2024b). For the first time, Mercosur will open its regional maritime transport market to EU shipping companies (European Commission, 2025b, p. 13). In addition, the draft agreement commits to

facilitate temporary cross-border entry of businesspersons in some categories including intra-corporate transferees, graduate trainees, business visitors, business sellers, contractual service suppliers and independent professionals (CIRCABC, 2025d).

Furthermore, **Article 10.1** explicitly reaffirms the parties' right to regulate (CIRCABC, 2025d, p. 172). This provision is notable as it preserves regulatory autonomy and sensitivity to domestic policy objectives while advancing the liberalisation of services.

The draft agreement will also improve regulatory conditions for service suppliers, providing stability and certainty when accessing each other's markets and allowing them to offer most services on equal terms with both domestic and foreign providers. Both parties will ensure licenses or necessary qualifications for suppliers are granted through clear, fair and straightforward procedures (Directorate-General for Trade and Economic Security, 2025d).

In terms of ecommerce, the agreement facilitates digital trade (electronic contracts, signatures and authentication systems for faster and more secure transactions). It also removes barriers such as custom duties on electronic information transmission. Prior authorisations meanwhile cannot be required to offer online services, which also makes it easier to sell products and services online. This draft agreement also attempts to promote trust in the digital economy and regulatory cooperation (through harmonisation and best practices).

Chapter 12: Government procurement

Since Mercosur countries are not party to the World Trade Organization (WTO) Agreement on Government Procurement (GPA), the draft agreement is a significant opportunity for companies seeking to participate in public procurement in these markets (Kommerskollegium, 2020, p. 3). In Chapter 12 of the agreement, government procurement (GP) is conducted according to the three fundamental principles: non-discrimination; transparency; and fairness (CIRCABC, 2025e).

Chapter 14: Small and medium-sized enterprises

The draft agreement aims to give small and medium-sized enterprises (SMEs) preferential access to the markets of both blocs' countries by reducing costs and non-tariff barriers that traditionally limit international expansion (CEOE, 2025). Some examples of SME-focused measures include **Article 14.3** which establishes SME coordinators as official points of contact (CIRCABC, 2025g, p. 346), and elsewhere in Chapter 4's **Article 4.9** which encourages each party to implement single-window systems that allow traders to submit all required documentation and data through a single entry point, thereby simplifying import, export and transit procedures (CIRCABC, 2025b, p. 77).

Chapter 18: Trade and sustainable development

In the context of recent and ongoing global crises such as the COVID-19 pandemic and the war in Ukraine, the EU is repositioning trade policy toward 'open strategic autonomy'. This aims to create more reciprocity between itself and others, projecting an EU more willing to protect and promote European firms and values in an increasingly uncertain world (Schmitz & Seidl, 2023, p. 841).

In response to civil society pressure and in context of global issues as above, sustainable development is now embedded in EU trade policy (Smith et al., 2021). The first EU FTA to incorporate sustainable development was with South Korea in 2011. Since then, FTAs with Canada, Vietnam, Japan, Mexico and Singapore have included dedicated chapters on trade and sustainable development (TSD). The EU–Mercosur draft agreement has followed in the footsteps of these previous FTAs with its TSD chapter.

This chapter outlines an explicit commitment to effectively implement the Paris Climate Agreement. This commitment includes concrete and measurable actions such as: trade in products that allow communities to preserve biodiversity; prohibition of trade in illegally obtained products; maintenance of labour and/or environmental standards; as well as promoting sustainable trade and attracting accompanying investment (Publications Office of the European Union, 2025b, p. 1). Sustainable development is moreover defined in the draft agreement's **Article 18.5** as having three dimensions - economic, social and environmental (CIRCABC, 2025h, p. 368). Related to this, a key principle in this chapter is non-regression, that is avoiding a race to the bottom

(lowering environmental or labour standards) to attract financial investment, as expressed in **Article 18.3** (CIRCABC, 2025h, p. 365).

Article 18.4 further reinforces labour rights by requiring all parties to ratify the eight fundamental International Labour Organisation (ILO) conventions (except one for Brazil due to constitutional constraints) in order to uphold standards on forced and child labour, non-discrimination at work, freedom of association, as well as the right to collective bargaining (CIRCABC, 2025h, p. 366–8).

Furthermore, and as outlined by **Article 18.7**, the parties must also implement other international environmental agreements such as the Convention on Biological Diversity (CIRCABC, 2025h, p. 371), as well as agreements regulating trade in endangered species or banned chemicals. To ensure compliance, if one party believes the other is not abiding rules, it can ask for formal government consultations. According to **Article 18.17**, in cases the conflict remains unresolved, an independent panel of experts can examine the situation and make public recommendations which can then be followed up (CIRCABC, 2025h, p. 383–6). The European Commission further explains how a party may suspend the agreement if it deems there has been a serious violation of the Paris Agreement or if one party withdraws from it (European Commission 2025a, p. 8).

Established in **Article 18.10**, the precautionary principle allows the EU and Mercosur countries to adopt measures to protect health and the environment even when scientific evidence or information is insufficient (CIRCABC, 2025h, p. 375).

By the end of 2025, only deforestation-free products will be allowed into the EU market (Reuters, 2024a). However, some critics have raised concerns, important to explore further. The draft agreement introduces a ‘rebalancing mechanism’, which Mercosur countries could invoke if they believe EU environmental laws unfairly restrict their exports, potentially demanding review or even compensation. This mechanism weakens EU regulatory autonomy, opening the door to diplomatic and commercial pressure that may compromise environmental and human rights standards (Meloni, 2025).

Other critics argue this agreement will reinforce unequal exchange between the two parties. Mercosur countries primarily export labour-intensive goods in exchange for capital-intensive goods, resulting in transfer of surplus value from Mercosur countries to the EU. In fact, the agreement may perpetuate the dominance of the primary sector in

Mercosur, potentially hindering the region's industrialisation (Bieler, 2025, p. 6). Furthermore, it could be interpreted as manifestation of neocolonial relations, in which peripheral political economies are organised primarily to serve the interests of the capitalist core (Bieler, 2025, p. 15).

Another major tension is the legal loophole regarding ecosystems not defined as 'forests', since the draft agreement only protects tropical and boreal forests. Ecosystems such as the Cerrado (a vast tropical savanna and Brazil's second-largest biome) remain unprotected, even though they are heavily affected by deforestation. Products originating from the Cerrado could still legally enter the EU market despite its ongoing destruction (Meloni, 2025). In addition, increased global demand for soy is largely tied to its being one of the cheapest and most widespread sources of animal feed, particularly for beef. As beef exports grow under the proposed deal, livestock expansion will necessarily increase soy production, creating more deforestation (Meloni, 2025). These environmental impacts intersect with human rights concerns, especially for Indigenous communities. Argentina, Brazil and Paraguay have all seen mass forced displacement of Indigenous people due to pressure from politically powerful agricultural companies (Bieler, 2025, p. 27). The deal does not include binding protections for Indigenous lands, forests and rights (such as self-determination and free, prior and informed consent), leaving communities vulnerable to commercial pressure (Meloni, 2025).

In addition, some argue the draft agreement contains further double standards. For instance, pharmaceutical companies will increase exports to Mercosur, including pesticides banned in Europe due to harmful ingredients. This not only endangers Mercosur's people and ecosystems, but also indirectly affects European populations as the pesticides may return indirectly to European shores via Mercosur agricultural exports (Tansey, 2022, p. 9). Another tension is the EU securing access to raw materials such as lithium, essential for battery production and the electric vehicle transition, despite significant environmental damage in Mercosur where these minerals are extracted (Bieler, 2025, p. 9).

Therefore, while the inclusion of a trade and sustainable development (TSD) chapter marks the EU–Mercosur deal as aligned with the EU's more recent ethical trade goals, the degree to which the text can truly create sustainable development – or indeed

whether these two terms of ‘sustainable’ and ‘development’ are compatible in practice – ought to be problematised.

Chapter 20: Exceptions

Chapter 20 of the draft agreement outlines exceptions to the deal. These exceptions include **Article 20.1** outlining that the agreement does not oblige a country to provide information that could impinge on national security (CIRCABC, 2025i, p. 393). The chapter’s **Article 20.2** also outlines measures a member state may take even if these measures contradict certain parts of the draft agreement, actions aimed at protecting public safety, public morals or public order (CIRCABC, 2025i, p. 394–5).

Chapter 21: Dispute settlement

Article 21.4(b) introduces a provision for a party to initiate a dispute not only when the other party has breached an obligation, but also when it considers that a measure adopted by the other party ‘nullifies or substantially impairs any benefit accruing to it under the covered provisions [...] whether or not such measure conflicts with the provisions of this Agreement’ (CIRCABC, 2025j, p. 403). This represents a transition from the traditional breach-of-obligations approach, extending the scope of dispute settlement to measures that are formally consistent with the draft agreement but nonetheless undermine benefits the other party was meant to enjoy under its terms.

Article 21.5 adopts a structured and time-bound approach including the first mandatory stage, in which parties must attempt to resolve disputes through good faith consultations (CIRCABC, 2025j, pp. 403–5). The complaining party must submit a written request identifying the disputed measure, provisions of the agreement considered violated, or otherwise the adversely affected trade benefits. Consultations must take place within 15 days of the request and should conclude within a maximum of 30 days (or 15 days in urgent cases, such as those involving perishable goods).

Furthermore, **Article 21.6** establishes institutionalised mediation mechanisms, through which the parties might engage in voluntary mediation to reach an intermediate

solution.

The arbitral award afforded following arbitration is binding and not subject to appeal. It determines whether there has been a violation of the agreement, or a nullification or impairment of trade benefits. The panel may recommend adjustments or compensation but cannot impose new obligations.

Articles 21.17 to 21.21 meanwhile explain the compliance phase. The defending party must comply in good faith and promptly. If additional time is needed, it may request a further ‘reasonable period of time’ (to be determined by the panel if parties cannot agree) (CIRCABC, 2025j, p. 419).

In cases of non-compliance, **Article 21.20** explains the complaining party may request temporary compensation. If no agreement is reached, the party may suspend trade concessions (for example, by increasing tariffs) up to a level equivalent to the damage suffered. The suspension must be proportional to the harm and preferably applied to the affected sector (CIRCABC, 2025j, p. 420).

Other provisions (**Article 21.6**) clarify the procedures and deliberations are confidential (CIRCABC, 2025j, p. 405) and (**Article 21.27**) that each party bears its own expenses and panel costs are shared equally (CIRCABC, 2025j, p. 430). **Article 21.23** states the same case also cannot be brought simultaneously before the WTO and under arbitration of the EU–Mercosur Agreement (CIRCABC, 2025j, p. 426). Finally, **Article 21.24** outlines that if the parties reach mutually agreed solutions, they may notify the Trade Committee at any time (CIRCABC, 2025j, p. 428).

Defending the interest of EU farmers

Across the entire draft EU–Mercosur agreement and in the way it has been presented publicly by the EU, protections for farmers are at the forefront. For this reason and due to the current pushback from particularly French farmers to the deal at the time of writing, the specific protections for EU agriculture will be sketched in detail here – in the draft agreement text as well as in other publicly available material.

Perhaps most tellingly, the EU Commission has presented the agreement as a way to

defend the interests of European farmers and food producers while making it easier for them to take advantage of new opportunities in Mercosur. The draft agreement does this primarily via boosting EU exports by removing high tariffs for the EU's main export products (Publications Office of the European Union, 2025a, p. 3).

Secondly, the draft agreement prevents imitation of 344 EU traditional food products, recognised as GIS (CIRCABC, 2025l; CIRCABC, 2025m; CIRCABC, 2025n). The distinction of a GI strengthens market position and enables the EU to sell products at premium prices. **Article 13.35** additionally bans imitation as well as misleading terms, symbols, flags or images (CIRCABC, 2025f, p. 308).

Thirdly, in **Article 6.7** the draft agreement aims to make export procedures faster, simpler and more predictable (CIRCABC, 2025c, pp. 118–21). **Article 6.9** meanwhile states all EU member states and Mercosur countries will have equivalent requirements (CIRCABC, 2025c, pp. 122) while **Article 6.15** further outlines that all parties will face clear and transparent audit rules (CIRCABC, 2025c, pp. 134–6). In addition, **Article 6.10** allows for EU zones not affected by animal health diseases to be able to export to the Mercosur region (CIRCABC, 2025c, pp. 124).

Fourthly and outside of the draft agreement text itself, the EU's Common Agriculture Policy (CAP) provides €300 billion to ensure EU farmers continue to receive strong and stable income. The EU will prioritise help to young farmers, small and medium-sized farms, as well as those operating in areas with natural constraints. Other measures include promoting healthy eating through local products via EU school programs or improving preparation and availability of agricultural supplies during emergencies (Directorate-General for Agriculture and Rural Development, 2025).

Fifthly, the EU also plans to establish a larger Unity Safety Net to support farmers through market disturbances to the tune of €6.3 billion for the seven-year period, doubling the current agricultural reserve (Directorate-General for Agriculture and Rural Development, 2025). The legislative proposal for the larger Unity Safety Net has been submitted to the European Parliament and Council for adoption between 2028 and 2034.

Sixthly, in terms of sensitive agri-food products – like beef, poultry and sugar – gradually implemented quotas permanently limit exports. Further, if imports from Mercosur cause (or threaten to cause) serious injury to the relevant EU sectors, Chapter

9 specifies bilateral safeguard clauses.

Some of the most contested products are (CIRCABC, 2025k; Directorate-General for Trade and Economic Security, 2025c):

Beef

Specifically, the EU has not given complete duty-free access to Mercosur beef but rather allows 99,000 tonnes of Mercosur beef (from all four countries) to enter the EU market with a 7.5% duty. Over half (55%) of this quota will comprise fresh or chilled meat and 45% of lower-value frozen meat. The overall volume represents 1.5% of total European beef production and is less than half of the current imports from Mercosur, which in 2024 were at 206,000 tonnes. In 2024, the EU exported almost double (€4.9 billion) what it imported. The quota under the agreement with the EU represents only around 0.6% of Mercosur's total production for that product or sector.

France's concerns regarding these products are clear. The French interprofessional beef association warns Mercosur countries already supply most of the EU's imported sirloin (so-called 'premium cuts'). If authorised imports were to focus primarily on sirloin, they would represent around one-quarter of total European sirloin production.

According to the French Livestock Institute, sirloin imported from Mercosur countries is between 18% and 32% cheaper than the European equivalent (AFP, 2025a).

Poultry

The poultry quota is designed to match growing EU consumption, expected to increase each year by roughly the same amount as the new preferential quota. Under the draft agreement, 180,000 tonnes of poultry can be imported from Mercosur duty-free, phased in over five years. This quota represents about 1.3% of the EU's total poultry production. For context, Mercosur exported 293,000 tonnes of poultry to the EU in 2024. This decline is largely offset by EU global exports, which reached 2.1 million tonnes in 2024. However, European poultry producers remain concerned that Brazilian exporters may concentrate on the most profitable cuts, particularly chicken breasts, further intensifying EU market competition (AFP, 2025a).

The difficulty of fully tracing antibiotic and growth hormone use in meat further complicates this debate, even though such substances are technically prohibited in the EU.

Ethanol

Ethanol duty production is expected to support EU job creation. On the one hand, ethanol used in the chemical industry has a quota of 450,000 tonnes. On the other hand, ethanol for all other uses has a quota of 200,000 tonnes and within this quota a reduced tariff is applied, equivalent to one-third of the normal tariff.

Honey

The honey quota allows 45,000 tonnes to be imported duty-free, covering less than 10% of total EU consumption, which will be phased in over five years. In 2024, Mercosur exported 24,000 tonnes of honey to the EU. This quota is intended to help meet EU demand (since domestic production only covers about 60% of consumption) and to diversify honey imports into the EU.

Rice

EU rice production in 2023–24 covered less than 50% of total consumption. The draft EU–Mercosur quota, phased in over five years, will enable duty-free import of 60,000 tonnes of Mercosur rice into the EU. This represents about 1.4% of EU consumption and is smaller than the total EU imports in 2024, which reached 211,000 tonnes.

Pork

A quota of 1500 tonnes on pork quota will be granted specifically to Paraguay on account of its land-locked developing country status.

Biodiesel

An extra biodiesel quota of 50,000 tonnes will be allocated to Paraguay, for the same reason.

Automobiles

For cars with internal combustion engines, the situation remains largely the same, with full liberalisation occurring over 15 years, including a temporary quota for existing imports at reduced tariffs. For electric vehicles, the transition to full, linear liberalisation is slightly longer (18 years) but this is balanced by a larger initial tariff reduction, from 35% to 25% on the first day, which immediately boosts EU export competitiveness.

Annex 2-A: Tariff elimination schedule

Annex 2-A (CIRCABC, 2025k) establishes a detailed schedule for tariff elimination across different ‘liberalisation categories’ (0, 4, 7, 10, 15, 15V, etc.), with timelines ranging from immediate liberalisation to 30 years for certain sensitive sectors. Products in Category 0 (Immediate Liberalisation) are tariff-free from the treaty’s entry into force, generally including industrial goods and manufactures with low economic sensitivity for both blocs. Some examples of products subject to immediate liberalisation include: steel and industrial metals; agricultural by-products for animal feed (such as maize); and natural textile fibres (such as flax and hemp). In contrast, Category 30 (30-Year Liberalisation) applies to highly sensitive industrial sectors. Some examples of products in this category include: dairy products (such as butter or milk powders); and high-value cheeses (such as Cheddar, Gouda or Roquefort).

The annex also specifies that some products will be excluded (‘E’) from tariff preferences and retain their base customs duties. These include, among others: meat products (such as goat and sheep meat); processed foods and preserves (for example, pasta and panettone); as well as hats, headgear and wigs. Furthermore, the annex specifies products subjected to tariff rate quotas (TRQs), meaning they will not benefit from tariff reductions even in the long term. Some examples include: fresh beef; ethanol; and honey. These essentially represent the ‘red lines’ of each country, where liberalisation is politically impossible.

Annex 18-A: Trade and sustainable development

Annex 18-A, A4 acknowledges traditional and Indigenous knowledge, as well as the role of other local actors, in promoting sustainable land use and in the protection, conservation and sustainable management of both forests and biodiversity. A4 also emphasises the importance of supporting Indigenous peoples and local communities (CIRCABC, 2025o, p. 19).

Anticipated Trade Impacts

Were it to be fully approved, proponents of the FTA argue it would allow the EU access to new markets for industrial products (especially automobiles, machinery, equipment and alcoholic beverages), sectors currently under pressure in Europe. Moreover, the EU would gain access to raw materials, energy, food, as well as competitive agricultural products, thereby securing and diversifying its supply chains. Furthermore, Mercosur countries are key producers of many raw materials, a sector in which the EU is not self-sufficient. By lowering tariffs on critical raw materials and derived products, the EU will be able to import them at lower cost, making European industries more competitive. It is argued that this will also help the EU move towards greater strategic autonomy from third markets, strengthen its security and defence capabilities, and at the same time guarantee some of the highest sustainability standards in trade and investment of critical raw materials (European Commission, 2025a, p. 1).

Mercosur will also benefit from lower tariffs, not only on raw materials but also on products made from them. This would encourage development of local industries that add value to those resources. In addition, it would improve the business climate in Mercosur countries by diversifying its trade partners (particularly reducing dependence on China) and attracting more investment, while exports to the EU would gain credibility thanks to the EU's high standards on sustainability, health and food safety. Finally, Mercosur citizens would also be able to provide services in the EU, including on a temporary basis (European Commission 2025a, p. 8).

However, given recent pushback from powerful EU actors at the time of writing – notably France (AFP, 2025b) – it remains to be seen whether the agreement will be fully ratified, or indeed ratified in its current form.

Key Takeaways for Australia

In the draft EU–Mercosur agreement, trade not only serves economic purposes but also functions as an instrument of global public policy (promoting green commerce, digital innovation and climate cooperation as the relationship’s main pillars). As the European Trade Justice Coalition explained in 2023, cooperation should not aim at increasing trade between parties as an end in itself. Instead, it should focus on enhancing commercial partnerships for products that are produced sustainably and are not readily available in the domestic market (European Trade Justice Coalition, 2023). To do this, enforcement mechanisms are essential. These must include measurable and verifiable obligations (not just statements of intent) on sustainable development, with clear milestones, an independent panel of experts, and the possibility of partial suspension of trade preferences in cases of serious, verifiable violations. Given Australia’s traditional economic reliance on coal and gas exports, how this will bear out in the EU–Australian negotiations currently underway remain to be seen.

The FTA with Mercosur also demonstrates the importance of active civil society participation, parliamentary scrutiny, as well as greater transparency throughout both negotiation and implementation. This includes establishing a structured consultation process with stakeholders before any public announcement, to gather input and address objections in advance. In particular, it shows the value of conducting detailed studies on the implications of the FTA for local populations and of promoting measures to reduce uncertainty and potential negative impacts. This approach could inform Australia’s own trade policy practices and ensure more inclusive and evidence-based decision-making.

Given the technical aspects of the EU–Mercosur deal, in Australia’s case it would likely be helpful to apply an eventual FTA progressively, according to each sectors’ sensitivity. Similarly, an eventual agreement would also likely negotiate tariff rate quotas and liberalisation schedules with very specific ‘phase-ins’.

Given the recent EU focus on ethics-based trade, it is likely an eventual Australian agreement will align with international frameworks such as the Sustainable Development Goals (SDGs) as well as the Paris Agreement. Criticisms of the draft EU–Mercosur deal’s definition of ‘forests’ also hold warning for Australia, which also has much unique and endangered biodiversity. Based on these criticisms, values-minded

observers might hope for a broad definition of ‘ecosystems’ in the final Australian agreement to avoid geographic loopholes and see both parties pursue legitimate ethics-based trade.

In addition, on animal health and sanitary and phytosanitary standards, the EU–Mercosur deal establishes clear inspection, sampling and audit protocols. For an island nation-state such as Australia for which biosecurity is important, it is likely these considerations will come to bear on a finalised agreement. Importantly, applying detailed phasing by product, variety and cut (for meat products) might limit pressure on premium market segments and include anti-concentration clauses to prevent exporters from focusing exclusively on the most profitable cuts. And to help Australian SMEs like Mercosur ones, it may be important to promote practical measures such as a customs single window, streamlined administrative procedures and targeted technical assistance.

Lastly, it is commonly cited that Indigenous people represent 5% of the global population but care for 83% of global biodiversity (Bieler, 2025, p. 12). A key takeaway might be not only acknowledging the essential role of First Nations communities in conserving natural resources but also encouraging binding measures to guarantee their rights and representation in committees, as well as promote their inclusion in markets and society. Given the Australian federal government’s difficulties ‘closing the gap’ between First Nations and non-Indigenous people, as well as the failure of the 2024 Voice referendum, such moves may not be easy in Australia’s sometimes-divisive political environment. Nonetheless, from a values-minded perspective it is clear vulnerable groups should be among the main beneficiaries of the agreement. Including explicit clauses ensuring First Nations peoples’ right to self-determination and recognition of traditional and local knowledge is essential. First Nations contributions – both practical and spiritual – can enhance sustainability and they should be considered not only beneficiaries but co-creators of sustainable trade policies.

As we continue to await a finalised agreement between Australia and the EU, lessons from the Mercosur and other FTA deals bring many considerations for the Australian audience to learn from. Indeed, as negotiation of both deals drag out with key agricultural concerns at the forefront, how the final agreements and ensuing negotiations might eventuate remains at this stage unknown.

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