MEAT ADVISORY

EU Suspends Brazilian Meat Imports from 3rd September

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Brussels has struck Brazil off the list of countries allowed to export animal-origin products to the EU, over unresolved concerns about antimicrobial use in livestock. The suspension covers beef, poultry, eggs, honey, aquaculture, live animals and casings, and takes effect on 3rd September. It's a food-safety decision, not a contamination scare or a trade dispute — but the timing is awkward: it lands weeks after the EU–Mercosur deal provisionally kicked in on 1st May, and Brazil would become the only Mercosur member not listed for these categories..

The underlying rules — part of the EU's "One Health" push against antimicrobial resistance — have applied to EU farmers since 2022 and are now being extended to outside suppliers. Brazil can get reinstated once the Commission is satisfied that Brazil has demonstrated compliance throughout the lifetime of exported animals.. Until then, access to the affected categories is closed, not cancelled.

Key numbers

3 Sep 2026 Ban takes effect	**~$1.06bn** EU beef exports at risk (2025)	**~$775m*** EU chicken exports at risk (2025)

**Annualised estimate from partial-year EU chicken import data — see Poultry section.*

Brazil has responded quickly. On 1st July, the Agriculture Ministry ordered EU-authorised export plants to put auditable antimicrobial controls and full traceability in place. But no talks have reopened the timeline so far, and Brussels hasn't hinted the date will slip.

Beef

Brazil's global beef trade, 2025

Destination	Volume (tonnes)	Value (US$)	YoY change
China	1.68 million	$8.90 billion	+22.8%
United States	271,800	$1.64 billion	+18.3%
Chile	136,300	$754.5 million	+29.8%
European Union	128,900	$1.06 billion	+132.8%
Russia	126,400	$537.1 million	—
Mexico	118,000	$645.4 million	—
Total (all destinations)	**3.50 million**	**$18.03 billion**	**+20.9% vol / +40.1% value**

Brazil is the world's largest beef exporter and second-largest producer. 2025 was a record year: 3.50 million tonnes shipped, worth $18.03 billion, up 20.9% in volume and 40.1% in value on 2024. The EU was only its fourth-largest market by volume, but the fastest-growing one — EU-bound shipments more than doubled (+132.8%) as exporters positioned ahead of the Mercosur deal.

That's the growth now at risk. The EU is a small slice of Brazil's total beef volume (around 4%), but a valuable one: EU beef averaged roughly $8,200/tonne in 2025 against a $5,150/tonne global blended average, reflecting demand for higher-value cuts. S&P Global CERA expects EU beef prices to rise once the ban bites, since Argentina, Uruguay and Paraguay — the Mercosur peers still on the approved list — are unlikely to fully replace Brazilian volumes in the short term.

Poultry

Brazil's chicken trade to the EU

Period	Volume (tonnes)	Value (US$)	YoY change
Full year 2024	231,900–233,137	—	+0.54%
Jan–Jun 2025 (pre-avian flu suspension)	125,300	$386.3 million	+20.8%
Jan–Sep 2025	137,200	—	—
Brazil global chicken exports, FY2025	5.324 million	$9.79 billion	+0.6% vol / –1.4% value

Brazil is the world's largest poultry exporter — 5.324 million tonnes of chicken shipped in 2025, a record, though revenue actually slipped 1.4% to $9.79 billion on softer pricing. The EU is a small share of the volume (about 4%) but punches above its weight on value: it's Brazil's second-biggest market for higher-value processed chicken, taking roughly a third of those shipments, and Brazil supplies about one third of all EU poultry imports — one of Brazil's largest premium markets for processed poultry.

This isn't the first shock to that trade lane this year. Brazil's first H5N1 case, in May 2025, closed EU poultry access for four months; it reopened in September 2025, with plant pre-listing resuming in October. Now the antimicrobial suspension threatens to shut it again from September — the second major disruption to EU-Brazil poultry trade in roughly twelve months. ABPA says talks with EU authorities are underway, but nothing is resolved yet.

What to Watch

- The 3 September deadline — no sign Brussels will delay it, and reinstatement means proving compliance across the whole supply chain, which the Commission views as the harder of Brazil's two fix-it options.
- EU beef prices — likely to firm up if the suspension remains in place as supply tightens; Argentina, Uruguay and Paraguay can't backfill Brazilian volumes at scale or speed.
- EU chicken prices — probably a smaller move, since the EU is largely self-sufficient, but the processed/value-added lines where Brazil has real EU share are more exposed.

- Where the volume goes instead — China, the Middle East and other markets already absorbing record 2025 shipments look the obvious overflow.
- EUDR, layered on top — the EU's deforestation rule takes full effect in December, adding georeferenced traceability requirements for beef on top of whatever comes out of the antimicrobial dispute.
- The politics — EU farm groups (Ireland's IFA among them) are calling this overdue enforcement; Brazilian officials have criticised the decision and are seeking its reversal. Watch for a compromise or partial carve-out before September.

Potential implications for UK importers:

- Short-term: Potentially positive, with more supply and opportunities to buy more cheaply.
- Medium-term: Uncertain, depending on whether Brazil restores EU market access and whether the UK aligns its standards more closely with the EU.
- Strategic: Importers with established Brazilian supplier relationships and logistics capacity are likely to be better positioned to benefit from any temporary market dislocation than traders relying primarily on spot purchases.

Sources: European Commission; Agência Brasil; Euronews; RTE; EUobserver; Rio Times; S&P Global; Food Safety News; ABIEC; ABPA; The Poultry Site; WATTPoultry.

*Prepared by **Meat Advisory Limited***

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