

The Meat Agenda:

Agricultural Exceptionalism and Greenwash in Brazil



Contents

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Executive Summary

As Brazil prepares to host the 30th conference of the parties of UNFCCC (COP30) in heart of the Amazon, the country is positioning itself as a global climate leader with ambitious emissions reduction targets of 59-67% by 2035.¹ Under President Lula, there have been laudable achievements: deforestation fell across all Brazil's biomes in 2024,² significant progress after the acceleration under President Bolsonaro, and the government has made meaningful advances in hunger reduction.³

Brazil has made 'transforming agriculture and food systems' the third axis on the COP conference agenda, after transforming energy, industry and transport and safeguarding forests and biodiversity. According to a letter by COP30 President André Aranha Correa do Lago, these axes and corresponding action points highlight 'super-leverage points' where accelerated implementation, enhanced cooperation, and targeted support can drive systemic transformation and include areas where Brazil's experience can contribute with concrete solutions.⁴ While this sounds promising, there is a risk that Brazil's powerful agribusiness sector, which is trying to position itself as part of the climate solution, will set the agenda.

Brazil is the world's fifth-largest emitter of greenhouse gases,⁵ and the fifth-largest emitter of methane,⁶ a potent greenhouse gas that warms the atmosphere 80-times more than carbon dioxide over a 20-year period. Agriculture accounts for 75.6% of Brazil's methane emissions, and 74% of its total emissions,⁷ with enteric fermentation (cow burps) producing 405 million tonnes of carbon dioxide equivalent (CO₂e) in 2023, more than Italy's entire economy (in CO₂e).⁸ Methane emissions increased by 6% between 2020 and 2023, with 97% originating from beef and dairy cattle.⁹ The scale of Brazil's livestock sector is staggering: the country has more cattle (238.6 million) than people (213.4 million)¹⁰ and is the world's largest beef exporter.¹¹

Agriculture is Brazil's largest climate polluter, yet the sector continues to be shielded from meaningful regulation through systematic greenwashing, effective lobbying and political capture by vested interests. This influence is so entrenched that despite Brazil being a signatory to the Global Methane Pledge, agricultural methane receives no mention in the country's nationally determined contribution (NDC) - a glaring omission.

In this report, Changing Markets Foundation:

- **Exposes the scale of corporate capture**, bringing together for the first time the coordinated calendar of industry-led events attempting to shape the narrative on agriculture around COP30.
- **Shines a spotlight on the agricultural methane blind spot** – an omission from Brazil's NDC that shields the country's biggest methane polluters from scrutiny.
- **Unpacks how key climate policies are being weakened**, from enforcement of the Forest Code to an Emissions Trading System that exempts agriculture altogether.

Brazil's agribusiness sector has long branded itself as championing 'environmental stewardship' – narratives often reported uncritically in national media. Multimillion-dollar marketing campaigns portray agribusiness as Brazil's economic engine, as a global food provider, and as a modern, inclusive sector that is central to national identity.

The reality is a far cry from the rhetoric: the industry is responsible for a range of well-documented crimes - from deforestation to exploitative practices, land grabbing, and pollution - which permeate the supply chains of global meat giants like JBS, Marfrig, and Minerva.¹² The industry is also largely focused on producing export-oriented commodities, while over two-thirds of the food consumed domestically is produced by Brazil's small farmers, who control just a quarter of the country's farmland and receive less than a fifth of public credit.¹³

Greenwashing and marketing campaigns are backed up by the powerful ruralist caucus, which controls most of Congress, and enables agribusiness to maintain a privileged position of lenient regulation and enormous tax breaks. The sector's power was laid bare in the so-called 'Destruction Bill' passed in July 2025 - a roll-back of environmental protections that, despite several vetoes from President Lula, still gave serious concessions to agribusiness in how it planned to 'cut red tape'.

The Road to Belém: Paved with greenwash

In recent years, the presence of corporate lobbyists has become a regular feature of COPs including representatives from JBS, Marfrig and Minerva as part of national delegations or hosting closed-door meetings.¹⁴ As Brazil is hosting COP30, its agribusiness sector is seizing the opportunity to capitalise on its political access,

putting in efforts to control the narrative and shape the agenda around climate, food and agriculture. Brazil's special envoy for agriculture, Roberto Rodrigues, promises that COP30 will showcase “*the efficiency and replicability of Brazilian tropical agribusiness*” to the world.¹⁵

These efforts will culminate in the AgriZone, part of the official COP30 agenda, which will host around 400 events, many led by industry, and is being promoted as a platform to address environmental challenges while showcasing the successes of Brazilian agriculture.

From forums presenting Brazilian agribusiness as an ‘environmental powerhouse’ to journalist workshops promoting ‘fair metrics’ for ‘tropical agriculture’, corporations have orchestrated a sophisticated campaign to position themselves as part of the climate solution. In addition to industry and political dialogue, the road to Belém has seen corporate influence over political events and media coverage, including industry-hosted journalist workshops and sponsored reporting. This report compiles a non-exhaustive list of events driven or influenced by meat corporations.

The efforts will continue throughout COP30, notably from JBS, which has been co-sponsoring COP30 coverage throughout the year with major Brazilian outlets O Globo, Valor Econômico and is a co-sponsor of the Folha media centre, to be held just 450 metres from the conference centre. The company is also preparing to launch a study at COP30 in collaboration with the University of Kansas to challenge current methodologies for calculating greenhouse gas emissions from livestock production, part of an industry backed campaign to downplay its methane pollution.¹⁶ Meanwhile, MBRF has been sowing the seeds for its renewed greenwash with its planned announcements around ‘low-carbon beef.’¹⁷

Brazil's Climate Plan: Structural weaknesses favour industrial agriculture

The trajectory of corporate influence seen in the lead-up to COP30 builds on the long-standing foundation of agribusiness greenwash and lobbying in Brazil. The impact of this is particularly stark when considering Brazil's updated NDC submitted in November 2024. As COP30 president, Brazil's own NDC and its stance on agribusiness-related issues will significantly influence the overall ambition of the conference.

Not only does the plan have critical omissions, such as ignoring agricultural methane, our analysis reveals that some of the policies included to enable emissions reductions from agriculture are critically flawed and that the powerful agribusiness lobby is trying to weaken some further.

A cornerstone of Brazil's NDC is its Climate Plan which has become a battleground in which rural caucus claims it ‘punishes those who already produce responsibly’. Other policies in the NDC also enabling weak regulation of or special treatment for agribusiness include:

- **The Tax Reform** consolidates fiscal privileges for pesticides and animal protein, rewarding high-emission systems rather than penalising them.
- **The ABC+ Plan**, a key policy for financing sustainable agriculture is widely touted by industry to burnish its sustainability claims. While the plan does set ambitious environmental targets, it has historically been ineffective with studies showing 75% of degraded areas in key land reclamation projects remain unchanged four years after funding.
- **The Brazilian Emissions Trading System** only regulates only about 30% of national emissions because agricultural emissions were excluded after the

sector argued that reliable methods to measure its emissions do not exist. However, meat companies actively work to get emissions credits through non-regulated, voluntary carbon markets. This contradiction highlights that methods for measuring agricultural emissions clearly exist but are being sidelined to protect industry interests, undermining the effectiveness of Brazil's NDC.

- **The Forest Code and Rural Environmental Registry (CAR)** are central to Brazil's NDC for land-use regulation and forest protection but face serious enforcement challenges. The CAR has been weakened by agribusiness influence and poor oversight, allowing millions of hectares of forest to be illegally registered or erased from records. Despite recognising the need to strengthen compliance, Brazil's NDC overlooks the persistent governance failures, political resistance, and delays that continue to undermine effective forest protection.

Agribusiness lobbyists are seeking to further undermine Brazil's climate commitments by pushing emissions calculations based on 'no additional warming', such as adopting GWP* methane metric, a move which would allow the country to claim climate neutrality or even cooling by investing in small methane emissions reductions while maintaining its vast livestock sector. This effort is part of a global industry campaign, supported by pro-industry scientists, to change the way methane is measured with the aim to protect their large livestock industries, despite the Intergovernmental Panel on Climate Change (IPCC) explicitly rejecting GWP* for national climate accounting, stating that it '*does not capture the contribution to warming that each methane emission makes.*'¹⁸

The path forward

Last year was the hottest ever recorded, with temperatures temporarily surpassing the 1.5°C threshold for the first time.¹⁹ Research shows that even if fossil fuel emissions were eliminated immediately, food system emissions alone would prevent meeting Paris Agreement trajectory of 1.5-degree temperature increase.²⁰ Already, 28% of Brazil's farmland lies beyond optimal climatic conditions, expected to rise to 74% by 2060—a threat to the agricultural sector's own future.

Brazil also has active grassroots movements, with Indigenous leaders and civil society groups challenging industry narratives and defending forests and climate. Threats to forests and livelihoods in the Bolsonaro era, have resulted in an increased mobilisation and renewed hope in Lula's government, when it comes to championing the climate agenda. Lula's government also has some remarkable recent successes in its pocket: it has made progress toward eradicating hunger through its renewed focus on supporting climate resilient agroecological farming that actually feeds Brazil's population and slow soaring deforestation rates.²¹

As world leaders gather in Belém, Brazil can choose which face it wants to show to the world: the one in which communities, climate and health are at the centre of the agenda, or vested interests that promote status quo with a green mask. COP30 is a critical opportunity to ensure that when it comes to food systems, climate science rather than corporate influence, shapes our path forward.



1. Introduction

In November 2025, Brazil will host the 30th annual UN Framework Convention on Climate Change (UNFCCC), known as COP30, in Belém, in the heart of the Amazon. The event is drawing global attention as President Lula is trying to reposition Brazil as a climate leader, after years of Bolsonaro government, when deforestation rates were soaring, while the country's environmental and social policies were being dismantled.

Brazil is the world's fifth-largest emitter of greenhouse gases, accounting for 3.1% of global emissions.²² It is also the fifth-largest emitter of methane, a potent greenhouse gas that warms the atmosphere 80-times more than carbon dioxide over a 20-year period.²³

Cutting methane emissions this decade is the emergency brake needed to slow the climate crisis. Agriculture is the primary source of methane emissions in Brazil, accounting for 75.6% of the country's total methane in 2023.²⁴

A particular challenge to Brazil's climate ambition is the outsized influence of its massive agriculture industry. This is seen in Brazil's nationally determined contribution (NDC), its country-level climate action plan to reduce emissions to the Paris Agreement target to limit global temperature rise to 1.5°C.

Brazil's updated NDC increases its commitment to reduce emissions by 43% by 2030 (compared to a 2005 baseline), to meet a 59-67% reduction by 2035.²⁵ Yet, the NDC makes no mention of reducing methane from meat and dairy, and its plans for tackling overall agribusiness emissions remain deeply flawed. This omission comes despite Brazil being a signatory to the Global Methane Pledge a commitment by over 100 countries to reduce their methane emissions by 30% by 2030.

This major shortcoming is symptomatic of ongoing intense lobbying and greenwash from Brazilian agribusiness, in line with its wider efforts to derail climate action.²⁶

In the lead up to COP30, Brazil's meat giants - including three of the world's largest meat companies, JBS, MBRF (recently merged companies Marfrig and BRF)²⁷ and Minerva (see section 2.1.1) - are positioning themselves to not only continue avoiding regulation but to present themselves as part of the solution to the escalating climate crisis.

Through industry conferences, political advocacy, policy interventions and strategic media alliances, trade associations and corporations are casting themselves as proponents of '*sustainable tropical agriculture*' and '*climate-smart agriculture*.' By occupying diplomatic and public spaces around COP30, agribusinesses are seeking to shape the global climate debate to align with their interests. These actions risk undermining genuine progress towards achieving the emission reductions that food systems must achieve to align with the Paris agreement.

In 2024, Changing Markets released a major report detailing the extensive tactics of global meat and dairy giants to distract, delay and derail climate action.²⁸ This report builds on this research to explore at how meat giants are consolidating these tactics in the run up to the global climate summit, in the world's largest meat exporter.





2. Setting the scene

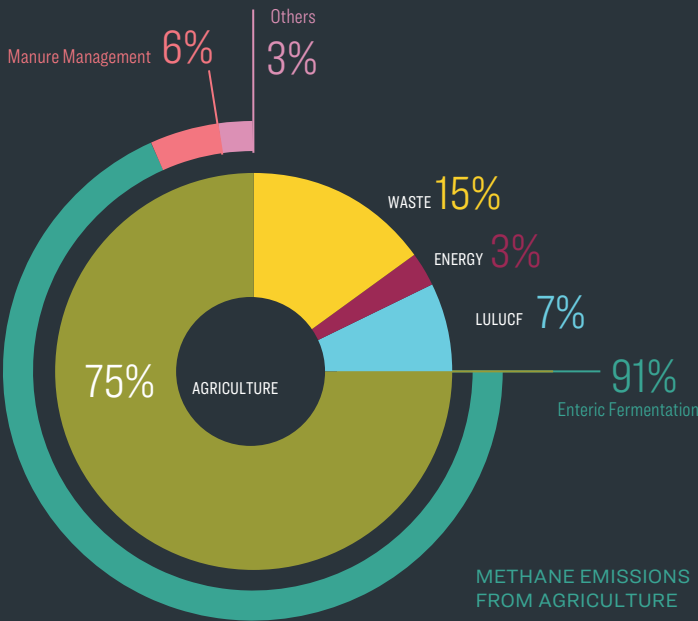
2.1 Agriculture and climate change in Brazil

Agriculture is the biggest climate polluter in Brazil, accounting for 74% of the country's total emissions. This includes both direct agricultural and livestock emissions, and emissions from deforestation and land-use change driven by agricultural expansion.²⁹

Land-use change, primarily the deforestation and conversion of forests, savannah and wetlands into agricultural land, has long been Brazil's biggest emissions challenge. While it remained the largest source in 2023, this share is declining, representing 46% of total emissions in 2023, down from 53% in 2022. This 7-percentage point drop marks the sharpest decline since 2009.³⁰

However, while deforestation emissions are falling, direct emissions from livestock are rising. Enteric fermentation (cow burps) is now one of Brazil's largest emission sources, producing 405 million tonnes of carbon dioxide equivalent (CO₂e) in 2023, more than Italy's entire economy.³¹ The agriculture and livestock sector recorded its fourth consecutive emissions peak from 2020 to 2023.³² Methane emissions in particular are increasing as cattle herds

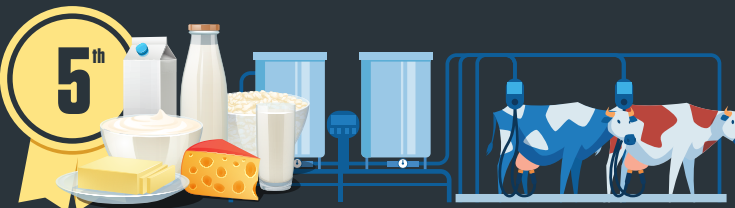
Methane emissions by sector
(in 2022)



LARGEST BEEF EXPORTER GLOBALLY



LARGEST CATTLE HERD IN THE WORLD



LARGEST DAIRY PRODUCER GLOBALLY

More cows than people

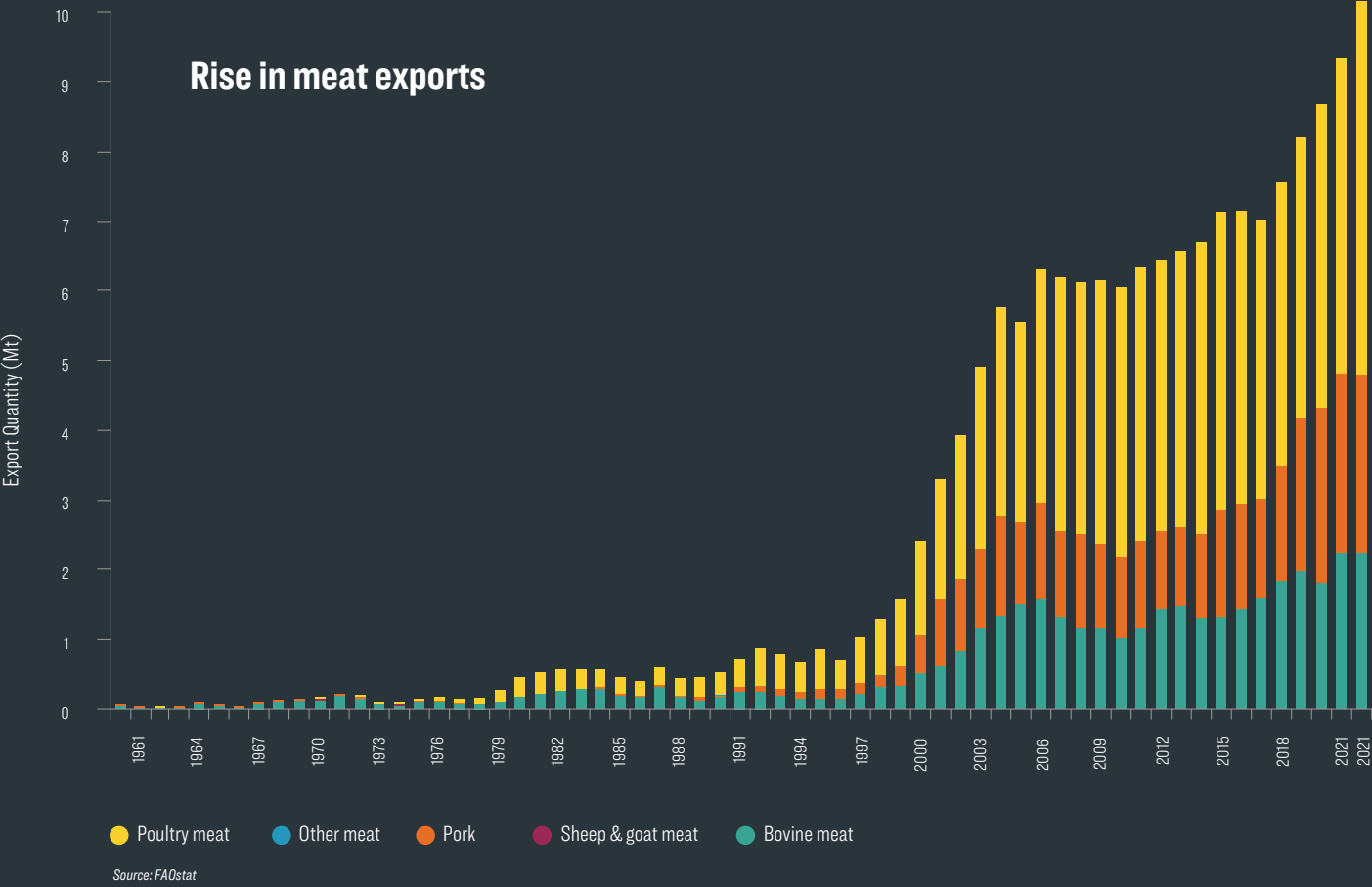
238.6 million Cattle



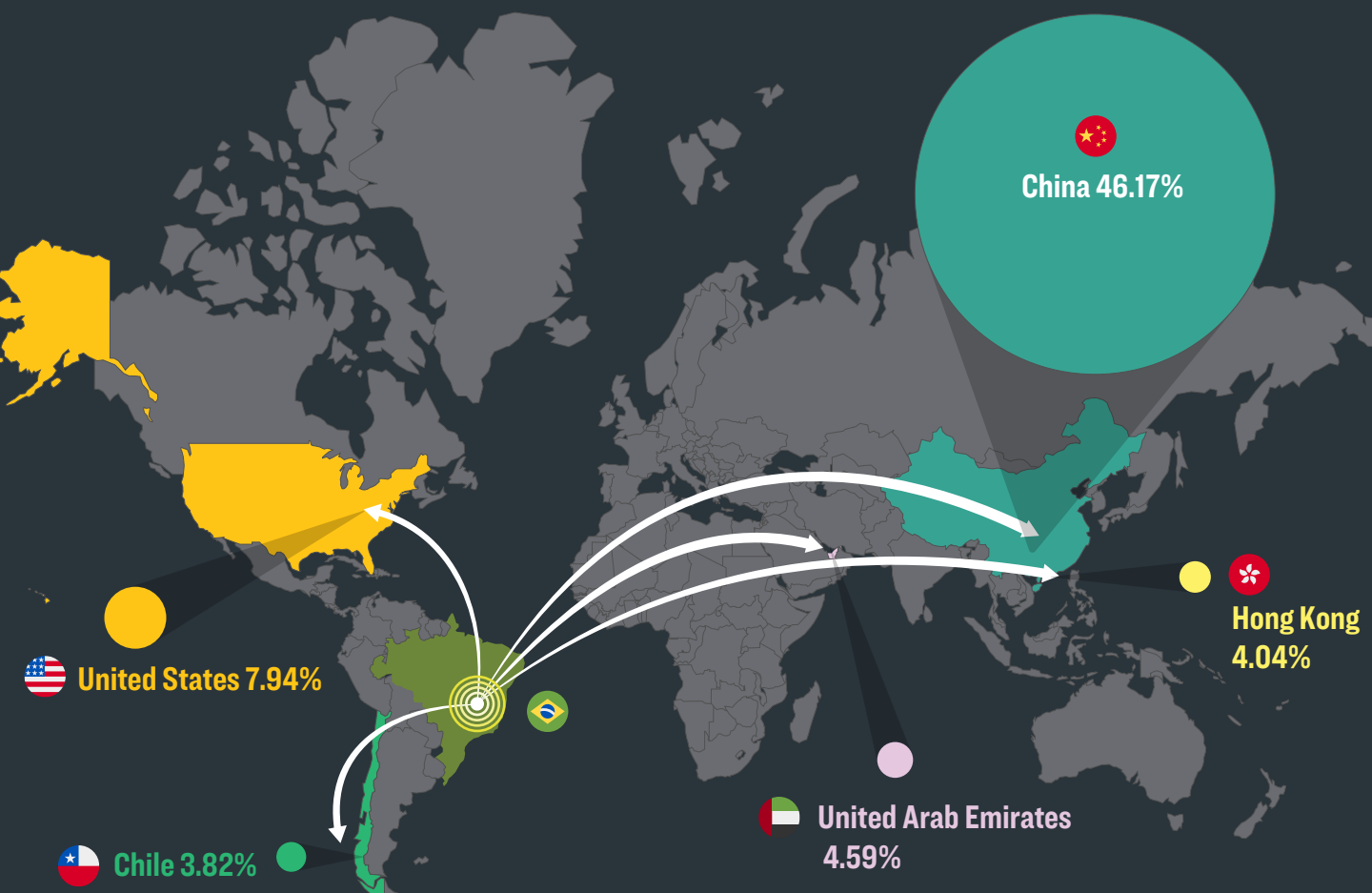
population of **213.4 million**



Rise in meat exports



2.89 million tonnes of beef exported in 2024



expand, with a 6% increase in the country's total methane emissions between 2020 and 2023,³³ of which 97.1% originated from the beef cattle and dairy cattle sectors (87.7% and 9.4% respectively).³⁴

2.1.1. *Brazil's meat sector*

Brazil has the second-largest cattle herd in the world, second only to India, which has a population six times larger than Brazil's.³⁵ Much of this vast industry is intended for exports, with Brazil being largest global exporter of beef³⁶ and the second-largest beef producer, behind only the US.³⁷ Brazilian exports account for 21% of all beef traded internationally. In other words, one in every five kilos of beef exported worldwide is Brazilian. This trend shows no signs of slowing: meat exports are forecast to grow by 27.1% between 2024 and 2034.³⁸

Brazil's outsized meat industry is dominated by vast agribusiness companies, most notably companies JBS, MBRF and Minerva.

JBS N.V.

JBS is the largest meat company in the world, with operations in 190 countries and a net revenue of \$77 billion^A in 2024.³⁹ JBS' total greenhouse emissions in 2023 were estimated at 241 million tonnes CO₂e, more than the individual emissions reported for 81% of the world's countries.⁴⁰

JBS is controlled by the J&F Group, which has strategically diversified into multiple sectors central to Brazil's economy and politics including mining, media (Canal Rural), banking and energy.⁴¹ This structure gives J&F significant economic and political influence, not only to dominate the global meat market via JBS but to shape

narratives, access credit and expand leverage across Brazil's economy, enabling it to project an image of innovation and sustainability, even as JBS continues to face allegations of deforestation, labour exploitation, bribery and corruption scandals.

In May 2025, JBS was approved to dual list on the US stock market, raising serious alarm bells, given the corporation's long-history of legal violations and environmental damage. The decision risks undermining investor confidence and weakening environmental, social and governance (ESG) standards.⁴²

In June 2025 a corporate reorganisation, saw JBS N.V., a Dutch company, become the new global holding company of JBS, while JBS S.A. became a wholly owned subsidiary. JBS S.A is listed in Brazil and N.V. on the New York Stock Exchange.

JBS and inequality

With annual revenues exceeding the GDP of 20 Brazilian states, there is a stark contrast between the exponential growth of JBS, supported by government policies and financial institutions, and escalating social inequality in Brazil. JBS' revenue is equal to around 2% of Brazil's GDP with its supply and related production chain estimated to hold 2.7% of national employment.⁴³ Over the past 20 years, R\$31 billion^B (\$5.7 billion) in public funds has been channelled to JBS through incentives from the National Bank for Economic and Social Development (BNDES). Yet poverty and hunger indicators have increased in 11 out of 12 major Brazilian cities where JBS operates.⁴⁴

The levels of disparity within the company are staggering.⁴⁵ More than 100,000 JBS employees earn an average monthly wage of R\$1,700 (\$320), not even a quarter of Brazil's estimated living wage (R\$7,075.83/\$1,310.00).⁴⁶ In stark contrast, in 2023 it was reported that JBS' five top executives earned \$424, 000 a month.⁴⁷

A All uses of dollar conversions in this report refer to USD.

B R\$ is the currency symbol for Brazilian reais, the national currency.

MBRF

In May 2025, Marfrig, the world’s largest ‘hamburger’ producer, announced a merger with poultry and pork giant BRF to create MBRF Global Foods Company, with a consolidated revenue of R\$152 billion/\$28.34 billion.⁴⁸ The merger completed in September 2025.⁴⁹

Marfrig’s^c total greenhouse emissions in 2022-23 were estimated at 72.63 million tonnes of CO₂e.⁵⁰ Like JBS, the company has been implicated in numerous scandals. Marfrig’s cattle suppliers include ranchers facing trial for forgery of land documents, clearing land without authorisation and environmental abuses around Indigenous territories.

In 2019, Marfrig started to raise money from investors (to date R\$5.5 billion (\$1 billion) to buy cattle directly from feedlots owned by MFG Agropecuária, whose managing director is the chairman of Marfrig/MBRF’s board of directors.⁵¹ These payments are expected to run until 2032.

JBS and Marfrig in the US

Together, JBS and Marfrig/MBRF slaughter roughly one in every three cattle in the US and own two of the four slaughterhouses controlling around 80% of the US meat market.⁵² Around 64% of JBS’s global income and 77% of Marfrig’s beef revenue come from these US subsidiaries.

Minerva

Minerva is the fourth largest emitting meat and dairy company. The company operates 25 cattle slaughterhouses across Latin America,⁵³ processing over 3.8 million cattle a year.⁵⁴ It reported revenue of R\$28 billion (\$5.24 billion) in 2023, of which 65% were exports.⁵⁵

Minerva’s total greenhouse gas emissions from 2022-23 were estimated at 55.6 million tonnes CO₂e.⁵⁶Minerva is rapidly expanding its operational footprint. In 2024 it was approved to acquire 16 slaughterhouses - primarily for cattle - from Marfrig as part of a broader billion-dollar deal.⁵⁷ Minerva has also been at the centre of environment and human rights scandals in Brazil and the wider region.⁵⁸

A series of investigations has exposed how Brazil’s cattle sector frequently operates at the intersection of financial and environmental crimes. Scandals such as *Boi de Papel* (Paper Ox) in 2024⁵⁹ and *Ojuara* in 2021⁶⁰ showed fraudulent financing schemes, money laundering and land speculation intertwined with cattle ranching, particularly in frontier regions of the Amazon and Cerrado.

There have been numerous exposés directly linking meatpackers to such scandals. These include JBS, Marfrig and another meat giant, Frigol purchasing cattle from suppliers under investigation for money laundering, using cattle from land grabbing and illegal deforestation;⁶¹ ⁶² JBS and Frigol buying cattle linked to a ‘narco-rancher’ (a rancher also using land for crimes such as drug trafficking),⁶³ and; JBS and Marfrig being associated with ‘cattle laundering’, in which livestock from illegally deforested areas in the Amazon passed through legal farms before reaching slaughterhouses.⁶⁴ Such scandals continue to be exposed in 2025, even as the industry gears up to showcase its sustainability at COP30.

C This report uses Marfrig for any references pre-dating September 2025.

Major global financial institutions, including Barclays, BlackRock, BNP Paribas, HSBC, Santander and Vanguard, finance and invest in these corporations. A 2025 investigation exposed how Minerva is profiting on the stock exchange while supporting suppliers tied to illegal deforestation and pressure on Indigenous territories.⁶⁵ The case underscores how investment funds and capital markets are increasingly implicated in sustaining high-risk supply chains.

The dairy sector

Brazil is the fifth largest producer of dairy globally.⁶⁶ While dairy companies use sustainability initiatives to enhance their public image and plan to leverage COP30 to highlight their contributions to global climate and food security targets,⁶⁷ the sector has not engaged in greenwashing at the same level as the Brazil's meat industry. In addition, unlike meat, there has been some meaningful progress in reducing methane emissions, recorded in the dairy industry. In 2024, Brazil's milk production reached a record 35.7 billion litres, even as the number of milked cows fell to the lowest level since 1979, indicating productivity gains.⁶⁸ A 2022 national inventory found that annual absolute methane emissions from the dairy sector declined by roughly 15% between 1990 (1.83 million tonnes) and 2020 (1.56 million tonnes).⁶⁹ However, despite this progress, we have not found any evidence that the dairy industry is advocating for ambitious methane action and therefore differentiating itself in policy advocacy.



Land-use change and deforestation driven by animal agriculture

Around 20% of Brazil's land is pasture in varying stages of degradation.⁷⁰ Between 1985 and 2023, more than 90% of often-illegal deforestation of the Amazon was to create pasture.⁷¹ Clearing forests, planting crops, placing cattle, and then attempting to legally claim illegally occupied areas is a common method of stealing public land in Brazil.⁷² Targeted violence against environmental and land defenders, pushing back against ongoing deforestation and land theft, in Brazil is common, with at least 413 land and environmental defenders recorded as having been killed or disappeared since 2012.⁷³

Having been on a downward trajectory for several years, deforestation began to increase after changes to the country's Forest Code were made in 2012, following industry pressure (see section 5.2.5). Rates spiked under former President, Jair Bolsonaro, reaching their highest level since 2008 in 2021, under three years into his presidency.⁷⁴

After serious setbacks under Bolsonaro, the current Brazilian government is showing signs of progress in tackling domestic deforestation. Between August 2023 and July 2024, 6,288 km of forest in the Brazilian Amazon were destroyed, a decline of 30.6% compared with the year before and a nine-year low.⁷⁵ In the Cerrado deforestation in the same period fell to around 8,174 km², the lowest level since 2019, representing a drop of around 25.8%.⁷⁶ In February 2025, the Brazilian Environmental protection agency Ibama announced *Operation Maravalha*, a year-long initiative to tackle illegal logging in protected areas and Indigenous lands with some of the country's highest deforestation rates, across the states of Amazonas, Para and Rondônia.⁷⁷ As host of COP30, Brazil has indicated it will use the conference to continue its efforts to tackle the global deforestation and deliver its pledge to reach zero deforestation in the country by 2030. This includes a proposal to establish the Tropical Forest Forever Facility which aims to pay developing countries that conserve their tropical forest.⁷⁸ Despite these promising signs, urgency remains as huge tracts of forest continued to be deforested in the Cerrado and the Amazon.

The Cerrado: a fragile ecosystem under pressure

The Cerrado savannah has become a new frontier for land grabbing in Brazil. This 'upside-down forest' holds vast stores of carbon in its deep roots and has exceptionally high levels of biodiversity, but unlike the neighbouring Amazon, it remains largely unprotected.

While native vegetation must be preserved on 80% of private lands in the Amazon, Brazil's

Forest Code permits up to 80% of Cerrado properties to be converted. This leaves this globally important savannah exposed to rapid agricultural expansion, native vegetation loss, economic setbacks, and exacerbated climate impacts.⁷⁹ The problem is exacerbated by its lack of international protection, including its exclusion from EU regulation on deforestation-free products, because it is not classified as 'forest' within Food and Agriculture Organization (FAO) definitions.

The conversion of the Cerrado to create pasture for agriculture and livestock in the Cerrado has grown by 69% over the past four decades.⁸⁰ A 2024 Global Witness investigation found that JBS, Marfrig and Minerva, source one in three cows from deforested land in the Cerrado, with an average of 1.132 square metres of forest cleared per head of cattle, nearly five times higher than in the Amazon.⁸¹

Animal agriculture and soy: intertwined production and destruction chains

Animal agriculture and crop production for animal feed combined occupy much larger areas of land than agriculture directly for human consumption. Brazil is the world's largest producer of soy,⁸² and around 80% of soy production in Brazil is destined for soybean meal, which is used in the production of animal feed, primarily for cattle, chickens, sheep and pigs.⁸³

Deforestation for animal agriculture is intertwined with soy production: In many cases, soy expansion takes place after pasture areas are converted, with livestock farming often being an initial stage in the deforestation chain for soy production.⁸⁴

Almost all (97%) of the mapped agricultural area in the Amazon consists of temporary crops, mainly soy (80.5%),⁸⁵ while the Cerrado is home to half of Brazil's soybean croplands.⁸⁶ Between 1985 and 2021, the area occupied by soy crops in the Cerrado grew by 1,443%, reaching almost 20 million hectares, or 10% of the biome, in 2021.⁸⁷

China is the world's largest importer of soy and Brazil is its largest supplier.⁸⁸ This global supply chain, on top of emissions from land-use change and direct from animal farming, requires vast amounts of fossil fuels to transport these commodities. Both China and Brazil have opposed plans for a levy on global shipping to be implemented by the UN.⁸⁹

Soy production, like animal agriculture in Brazil, is dominated by vast agribusinesses. Its biggest exporters include ADM Amaggi, Bunge Alimentos, Cargill, Louis Dreyfus Company.



3. An industry at the centre of power

Agribusiness exerts enormous influence over Brazil's policy and regulation. Before considering how the industry is positioning itself ahead of COP30, this chapter provides a brief overview of the industry's long history of lobbying, campaign financing and greenwashing to manipulate public and scientific opinion.⁹⁰ It is upon this foundation of 'agricultural exceptionalism' and close industry-government ties that the industry has been able to push its pro-meat agenda ahead of COP30.

3.1 Controlling the agenda at every level

The agribusiness industry dominates the Brazilian Congress through the *Frente Parlamentar da Agropecuária* (FPA), or Agriculture and Livestock Parliamentary Front. The FPA, known as the 'ruralist caucus', currently holds a majority in Congress, controlling 59% of deputies (303 out of 513) and 62% of senators (50 out of 81). This gives the sector enormous power to advance and protect its interests.⁹¹

The *Instituto Pensar Agropecuária* (IPA), ‘Thinking Agribusiness’, is the driver of the FPA’s efforts in Congress. It is within the IPA that decisions are made on which bills will be supported, blocked or fast-tracked.⁹² The IPA is financed by 48 business associations, including many of the biggest multinational and Brazilian agribusiness corporations.⁹³

The IPA produces technical briefs and draft legislation aligned with the sector’s priorities and coordinates daily meetings between politicians and private-sector representatives. This near-constant channel of communication between corporate lobbying and legislative action undermines the independence of Congress.

Agribusiness has consolidated power at the municipal level too. In 30 of Brazil’s 100 largest municipalities, covering 37% of the country’s territory, environmental departments have been folded into portfolios that also include agribusiness, mining and tourism.⁹⁴ This institutional design creates a fundamental conflict: the agencies tasked with environmental protection are now aligned with the economic interests they should be regulating.

In addition, there have been scandals involving individual legislators – nominally tasked with oversight of the industry – for not only having conflicts of interest (for example, by running vast cattle farms themselves) but having exploited the political system to gain access to public resources and donations.⁹⁵ In addition, there have been documented instances of abuses, forced evictions and encroaching on Indigenous territories, connected with their farms.⁹⁶

Agribusiness operators, including cattle ranchers who supply JBS, are also known to have helped fund and coordinate the attacks on public institutions aimed at reinstating Bolsonaro following the elections in October 2022, culminating in the attempted coup on 8 January 2023.⁹⁷

Beyond political lobbying, agribusiness interests exert influence over academic discourse, media reporting and the public imagination.⁹⁸ This has included the FPA funding research from the Brazilian Observatory of Research and Innovation in Bioeconomy, an institute sponsored by the Confederation of Agriculture and Livestock (CNA) to suggest ways the industry could present biogenic methane emissions as ‘neutral’ (see box 5.1: GWP*).⁹⁹ Using research institutes to create an air of scientific credibility and independence, is a tactic used time and again by big meat and dairy companies globally.¹⁰⁰

The FPA strategy to shield the livestock industry from climate regulation includes downplaying the science on methane, including obscuring its real climate impact, and attempts to fundamentally alter how it is accounted for (see box 5.1: GWP*).

Brazil's (PL 2159/21) 'Destruction Bill'

A bill, dubbed the '*Destruction Bill*' by environmental groups was first introduced in 2021, and pushed by industry interests to weaken environmental safeguards and expand deforestation.¹⁰¹ It was approved by Chamber of Deputies in July 2025 and passed with revisions in August 2025, providing a recent example of the power of the agribusiness sector to shape legislation in its favour, at the expense of Brazil's vital ecosystems.¹⁰² The passing of the law, even in revised form, was a significant concessions to ruralist caucus, agribusiness lobbyists and the FPA.¹⁰³ President Lula vetoed some of its most harmful provisions and the FPA is now attempting to overturn or bypass all vetoes,¹⁰⁴ as well as reintroduce weakened provisions through congressional manoeuvres and more than 800 amendments.¹⁰⁵



4. Big Meat's Big Brazilian Greenwash

4.1 A long history of greenwash and misleading narratives

Multimillion-dollar marketing campaigns portray agribusiness as Brazil's economic engine, as a global food provider, and as a modern, inclusive sector that is central to national identity. It is likely that no Brazilian resident has not repeatedly heard the phrase '*Agro is tech, agro is pop, agro is everything*,' as propagated by the marketing campaign of the country's largest media conglomerate, Rede Globo. This refers directly to the advertising piece *Agro - The Industry - The Wealth of Brazil*, one of the most widely broadcast campaigns on Brazilian television, involving enormous financial resources.¹⁰⁶

In recent years, the industry has moved to also position itself as a leader in sustainability. In 2019, former agriculture minister Tereza Cristina called it '*the most sustainable in the world*' – even as deforestation rates were rising.¹⁰⁷

Social media campaigns disseminated by the FPA, for example, consistently use greenwash to brandish the sector's '*environmental stewardship*', and contribution to global food security - narratives often reported uncritically in national media.¹⁰⁸

Such campaigns came about because of growing negative perceptions of agribusiness by young people in Brazil, and globally and have included a strong focus on targeting students and young people with pro-industry messaging. In addition, the industry owns TV channels, programmes and publishing houses, and groups like the Brazilian Agribusiness Association (ABAG) work overtime to create and track the impact of positive images of the industry within Brazil and internationally.¹⁰⁹

4.2 Big Ag ahead of COP30: 'we're part of the solution, not the problem'

The presence of corporate lobbyists has become a regular feature of the COP including hundreds of agribusiness lobbyists, in recent years.¹¹⁰ From JBS, Marfrig and Minerva representatives attending some COPs as part of Brazilian delegations; to hosting closed-door meetings to signing pledges, the summit has become a key focus for pushing industry interests.

Now as COP30 places Brazil at the centre of the climate stage the agribusiness sector is seizing the opportunity. The industry is working overtime in its efforts to control the narrative and shape the agenda. Brazil's special envoy for agriculture, Roberto Rodrigues, promises that COP30 will showcase "*the efficiency and replicability of Brazilian tropical agribusiness*" to the world.¹¹¹

Industry groups have been using social media campaigns to push its core messages

throughout 2025, co-opting events such as World Environment Day and Amazon Day with claims such as '*responsible agriculture protects the Amazon and feeds Brazil sustainably*'.¹¹²

The Brazilian Rural Society (SRB), a non-profit focused on defending agriculture and livestock interests, celebrated World Environment Day by framing Brazilian agribusiness as a '*true environmental powerhouse*'.¹¹³

JBS, two weeks before COP30, launched a campaign suggesting it 'feeds a better future', celebrating its global presence and 'small' origin.¹¹⁴ The campaign features the voice of Fátima Bernardes, a famous TV presenter in Brazil.

Industry groups also pushed such greenwash narratives on social media following involvement in multiple events, outlined below, that brought agribusiness representatives together to align on messaging ahead of COP30,^{115 116 117} including the hosting of World Meat Congress, which took place in Brazil's largest beef producing state of Mato Grosso between 27 and 30 October 2025.

At the Congress, Eric Mittenenthal, from the US Meat Institute discussed industry preparations and expectations for COP30, while pro-industry scientist were also expected to dissect the "negative narrative for the meat sector" from the recent update of the EAT-Lancet scientific report.¹¹⁸

4.2.1. Blue Zone, Green Zone... AgriZone

Throughout 2025, on the ‘road to Belem’ the Brazilian Ministry of Agriculture and Livestock (MAPA) has organised a series of strategic engagements to bolster Brazil’s position in COP30 negotiations.¹¹⁹ A central initiative is ‘*Journey for the Climate*’ led by Brazil’s state-owned agricultural research corporation, Embrapa which operates under MAPA.¹²⁰

Journey for the Climate is sponsored by multinational corporations such as Nestlé and Bayer, as well as the Inter-American Institute for Cooperation on Agriculture (IICA) aiming to position agribusiness as a ‘proactive solution’ to climate change while informing public policies and empowering negotiators.¹²¹ According to its website, ‘*Embrapa is dedicated to promoting an agriculture that not only resists climate adversities but is an active part of the global solution to address climate change. ... The Journey for the Climate will facilitate the relationship between different stakeholders in society by promoting the sharing of knowledge and technological solutions for the development of sustainable agriculture.*’¹²²

The *Journey for the Climate* efforts will culminate in the AgriZone, part of the official COP30 agenda alongside the traditional ‘blue’ and ‘green’ zones. The AgriZone will be housed inside Embrapa’s headquarters, less than 2 kilometres from the Blue Zone, the main COP30 negotiation venue. Over the COP period, it will host approximately 400 events many led by industry. The AgriZone is being promoted as a platform to address environmental challenges while showcasing Brazilian agriculture. Its stated mission includes elevating Brazil’s role in global food security and demonstrating pathways for energy transition.

While it has been encouraging to see recent COPs increasingly prioritise food and agriculture, the AgriZone appears to serve a different purpose. Rather than driving

substantive reform, it appears designed to burnish agribusiness’s image on the world stage promoting a narrative of sustainability that bears little resemblance to reality.

In addition to industry and political dialogue, the road to Belém has seen corporate influence over political events and media coverage, including industry-hosted journalist workshops and sponsored reporting. Such initiatives shape how sustainability, agribusiness and climate policy is framed in public debate.

The table below provides a (non-exhaustive) list of events driven or influenced by meat corporations explicitly, excluding broader agribusiness events.

Agrodemia and greenwash at COP30

Among numerous corporate-sponsored events at COP30, JBS will present a study in collaboration with the University of Kansas that challenges current methodologies for calculating greenhouse gas emissions from livestock production. It will use this to argue that existing models, based on European temperate climates, fail to account for carbon sequestration in tropical systems like Brazil’s. The initiative aims to bolster Brazil’s green credentials on the global stage and counteract criticism of the Brazilian beef industry in the European market.¹²³ Collaborations with academic institutions by agribusiness, such as this, are a classic industry tactic designed to bring scientific credibility to their narratives.¹²⁴

MBRF is also seizing the opportunity to present a new greenwash approach at COP30, this time by launching its ‘low-carbon beef’. The ‘low-carbon beef’ is an update on the ‘Carbon Neutral Meat’ certification it used for its Viva range launched in 2020 with the backing of Embrapa.¹²⁵ This new standard recognises the assurance issues with the previous product claims and now focuses on soil carbon storage as opposed to tree-based carbon storage, which is supposedly ‘simpler’.¹²⁶ However, soil carbon storage is even more difficult to measure than tree-based sequestration, meaning this new greenwash product will be even harder to verify.¹²⁷

4.2.2. The Road to Belém: Paved with greenwash

Date (2025)	Event	Info
 14 March	COP30 Amazonia Belém	Major Brazilian media outlets <i>Valor Econômico</i>, <i>O Globo</i> and <i>CBN</i> announced <i>COP30 Amazonia</i> a multimedia platform hosting a series of debates and special content on the Amazon ahead of COP30.¹²⁸ The project is sponsored by JBS and mining giant, Vale, which shares a long-documented history of human rights abuses and environmental destruction.
 28 March	American Chamber of Commerce for Brazil (AmCham) São Paulo	Organised by AmCham, the conference sought to address ‘the challenges of COP30’ with key public and private sector representatives, including agribusiness leaders JBS, Cargill and Bayer.¹²⁹ Presented at the conference was the ‘COP30 Business Ambition’ which included 13 proposals intended to influence climate and environmental policies. These fell into two ‘axes’ on the international agenda and national policy with a strong focus on ‘unlocking public resources’ in the former.¹³⁰ At the conference JBS CEO, Gilberto Tomazoni, used this platform to claim that Brazilian agriculture is already sustainable and claiming COP30 offers the chance to showcase this, while calling for investment in the ‘green transition’ for rural producers.¹³¹ Public sector attendees included high profiles representative from the government and COP30 Presidency, such as João Paulo Capobianco, acting Minister of Environment and Climate Change; André Correa do Lago, president of COP30; Helder Barbalho, governor of the state of Pará; and Luciana Costa, director of Infrastructure, Energy Transition and Climate Change at BNDES.¹³²

Date (2025)	Event	Info
 	Action Agenda on Regenerative Landscapes <i>Bahia</i>	This COP30 preparatory event, part of <i>Journey for the Climate</i> was organised by the Association of Farmers and Irrigators of Bahia (AIBA), representing producers in the Cerrado agricultural area known as MATOPIBA (Maranhão, Tocantins, Piauí, Bahia). The summit was framed as an opportunity to showcase Brazil’s advances in sustainable agriculture, with a focus on restoring degraded areas and expanding regenerative practices in the Cerrado, while evading discussion about the ongoing destruction of the Cerrado by agribusiness interests. At the event, the Minister of Agriculture and Livestock, Carlos Fávaro, emphasised the role of Brazilian agribusiness in shaping global sustainability discussions at COP30.
 	Espaço Folha <i>Belém</i>	Brazilian newspaper Folha announced its Espaço Folha media and events centre to be hosted just 450 metres from the COP30 venue. As with COP30 Amazonia, Espaço Folha is sponsored by JBS, alongside Vale.¹³³ ¹³⁴
 	ABAG forum: Towards COP30: Agribusiness and Climate Change. <i>São Paulo</i>	The ABAG forum brought together representatives from government, companies and academia to shape strategic positioning ahead of the release of its report in August 2025 (see below). Discussions centred around industry contributions to climate adaptation and mitigation; how to achieve financing for the sector; and the role of agribusiness in carbon markets.¹³⁵ While ABAG does not make its members list publicly available, it identifies major agribusiness firms such as Cargill and JBS among its associates.¹³⁶
 	National Supply Chain Forum for Environmental, Social and Governance (ESG) <i>São Paulo</i>	The annual forum organised by the Brazilian Supermarkets Association (ABRAS), brings together business and government. This year’s conference included a COP30 specific session designed to reinforce the agribusiness narrative of sustainability and responsibility.¹³⁷

Date (2025)	Event	Info
 22-26 June	International Food and Agribusiness Management Association, (IFAMA) 35th Annual World Conference. Ribeirão Preto	Held in Brazil for the first time, IFAMA 2025 saw more than 600 participants from over 50 countries, across academia, business and policy gather in Ribeirão Preto (the ‘Agribusiness Capital’ of Brazil).¹³⁸ The conference was designed to look at promoting ‘innovative agro-industrial models and ensure a sustainable food supply’ to address identified key trends and challenges. These challenges did not include the sector’s climate emissions but did include potential delay tactics such as ‘bioenergy’ and the ‘development of cooperatives’.¹³⁹ At the event, Embrapa announced the creation of a ‘<i>Home of Sustainable Agriculture of the Americas</i>’ as part of the AgriZone. Other discussions included the idea of creating a ‘new narrative’ to position agriculture as a solution worthy of climate financing. Manuel Otero, Director General of the IIAC, declared that “<i>Our time has come. We can offer a new image of the agricultural sector in the Americas</i>” and that it was time to “<i>leave behind the old narratives that certain sectors insist on presenting, which link agriculture with poverty and pollution.</i>” The conference’s conclusions were presented in a letter to COP30 President, André Corrêa do Lago, President of COP 30, and Roberto Rodrigues, Special Envoy for the agricultural sector. In the document it is ‘<i>warned that the world faces the need to increase the production of food and bioenergy to meet the demands of a growing population, combat hunger, and protect the environment, making it essential to optimize resource use</i>’.¹⁴⁰ The letter emphasised the contribution agriculture is making as it number of ‘sustainable production’ and ‘technical solutions’ to be presented at COP30, but makes no mention of addressing unsustainable meat production levels. IFAMA is sponsored by companies including soy and meat giant, Cargill, as well as Bayer, Nestlé, and Syngenta.¹⁴¹
 24–25 June	World Agri-Tech South America Summit Ribeirão Preto	This annual conference was, in 2025, held in the context of ‘<i>having COP30 on the horizon</i>’. Supported by Embrapa and MAPA, it was billed as exploring ‘<i>climate-smart technologies and innovation</i>’ and how Latin America can be a ‘<i>driving force in global climate resilience efforts</i>’. Its sponsors included Marfrig, as well as Bayer and Syngenta, and attendees included JBS and Cargill.¹⁴²

	Date (2025)	Event	Info
	25–28 June	Latin American Soil Carbon Symposium	The Soil Carbon Symposium, part of <i>Journey for the Climate</i> was organised by Embrapa, alongside entities such as Integrated Crop-Livestock-Forest Network, and research institutes.¹⁴³ The event included a presentation by Marfrig showcasing ‘low-carbon’ agriculture. Marfrig representative, Murilo Geres, spoke about the ‘Carbon Neutral Beef’ programme, developed in partnership with Embrapa in 2020. The heavily promoted product claimed that if beef came from cows reared on silvopastoral (livestock-forest) or agro-silvopastoral (integrated crop-livestock-forest) land, emissions are neutralised by the trees on the land. However, carbon sequestration is difficult to measure, and the company provides no clear evidence to back up its claims. At the symposium, Geres admitted to having problems with the programme with logistical issues making it too complicated and expensive for most farmers to use the system, meaning that in fact, just one Brazilian farm is certified. Therefore, Geres announced that at COP30 a new ‘simpler’ initiative is to be launched: ‘Low-Carbon beef’ based on soil management practices, such as pasture rotation. However, as soil carbon storage is even more difficult to measure than tree-based sequestration, meaning this new greenwash product will be even harder to verify.¹⁴⁴
		ABAG: Agribusiness and Climate Change, Strategic Sector Positioning for COP30	The ABAG report <i>Agribusiness in the Face of Climate Change</i>, discussed at the <i>Towards COP30</i> forum in April, was officially released at this conference. Its aim is to ‘guide the agribusiness sector’s actions at COP30, as well as serving as an advocacy tool for various strategic audiences.’¹⁴⁵ ¹⁴⁶ The report frames Brazilian agribusiness as a contributor to climate solutions, by promoting the use of technologies and through policies like the ABC+ Plan, the Brazilian government’s low-carbon agriculture policy (see section 5.2.3), stating that COP30 is an opportunity to who how agriculture can support mitigation and adaptation, while promoting access to finance and integration into global carbon markets.
		ClimaCorp: Business Leadership in the Era of Climate Transition	A panel event promoted by the Brazilian media and events company Reset, included Marfrig amongst its sponsors.¹⁴⁷ At the event speakers positioned agribusiness as part of the climate solution. For example, Marfrig presented the Brazilian livestock sector as offering a global model for decarbonising animal protein production. Paulo Pianez, the Global Director of Sustainability, acknowledged the methane issue, but presented techno-fixes and land restoration as solutions with no acknowledgment of the deforestation and environmental degradation directly associated with the company’s operations.

Date (2025)		Event	Info
	25 August	Agriculture, Climate, and Connecting Information – a journalist workshop	ABAG and Bayer hosted a journalist workshop for 20 participants across national and regional outlets. • The workshop encouraged journalists to report using three narratives directly from the industry’s greenwash playbook: ¹⁴⁸ • The role of agriculture in climate change • Regenerative agriculture and climate resilience • The importance of ‘fair metrics’ for tropical agriculture
	21 August	Estadão Summit ESG 2025	At this high-profile event, hosted by <i>Estadão</i>, an influential newspaper, Marfrig was given a platform to speak about its commitment to ESG principles and ‘sustainable practices’ in the meatpacking industry.¹⁴⁹
	23 September	Proposals for a Global Climate Transition for the Land Use Sector	The Brazil Coalition Climate, Forests and Agriculture (Coalizão Brasil) launched a report during Climate Week, New York City, presenting land-use policy recommendations ahead of COP30. These included the restoration of degraded lands; zero deforestation by 2030; strengthening of traceability in supply chains; and new financial mechanisms for ecosystem services and sustainable agriculture.¹⁵⁰
		New York, USA	While these sound ambitious, there are significant conflicts of interest as JBS, Marfrig and BRF (still listed separately) are not only Coalizão Brasil members, but also donors.^{151 152}

Date (2025)	Event	Info
 25 September Agribusiness Forum <i>Londrina</i>	High profile politicians, industry leaders and journalists attended the event which promoted agribusiness as an ESG success story and guarantor of global food security.¹⁵³ Speakers emphasised that agribusiness must counter negative stereotypes by using ESG as a communications tool. Journalist Giuliana Morrone closed the event stating that “<i>efficient communication</i>” is essential to demonstrate not only the sector’s sustainability but also its “<i>healthy competitiveness</i>”, so that these practices are “<i>correctly understood and valued</i>”.¹⁵⁴	
 29 September – 2 October FAO Global Conference on Sustainable Livestock <i>Rome, Italy</i>	This official FAO conference, was also considered part of <i>Journey for the Climate</i> by Embrapa. Although an official UN conference, it featured numerous events pushing industry narratives. For example, a side event hosted by the CNA sought to ‘co-develop metrics for sustainable beef production’, and position Brazil as a leader in livestock transformation.¹⁵⁵ The conference also featured a screening of <i>World Without Cows</i> followed by a panel discussion and cocktail reception, by the US Meat Institute’s Protein PACT. The documentary, commissioned by animal-nutrition company Alltech, has been heavily promoted through livestock-industry channels and events.¹⁵⁶	
 1-3 Oct Rio+Agro 2025 International Forum for Sustainable Agro-Environmental Development <i>Brasilia</i>	In its second year the Rio+Agro event, ‘the largest agribusiness event in Brazil’ was also part of the <i>Journey for the Climate</i>.¹⁵⁷ In 2025, it was framed around the central theme of ‘<i>Brazil, a leader in the sustainable agro-environmental development of the tropical belt, promoting food, water, energy, socio-environmental and climate security in the world.</i>’¹⁵⁸ There were more than 18,000 participants, with 180 presentations by 74 national and international speakers, with Roberto Rodrigues the keynote speaker for the session Towards COP 30: Brazil as a global leader in agriculture for peace and sustainability.¹⁵⁹ The event closed with a panel entitled ‘Marketing and advertising: a vital strategy for the future of national agriculture’. Panellists included journalists from <i>Globo</i> and <i>Estadão</i> and Juliano Nobrega, Corporate Communications Director at JBS.¹⁶⁰	

Date (2025)	Event	Info
	28-30 Oct World Meat Congress <i>Cuiabá</i>	The <i>Instituto Mato-grossense da Carne</i> (IMAC) brought the World Meat Congress, one of the most influential global gatherings of the animal protein industry, to Brazil for the first time. The event was held in Cuiabá, Mato Grosso, a state that symbolises the country’s agricultural might^D just 10 days before the start of COP30. IMAC president Caio Penido has stated that Brazil is ready to expand meat exports to China and argued that Europe, if truly committed to sustainability, should support Brazilian beef through carbon credits or payments for ecosystem services.¹⁶¹ Confirmed speakers include meat industry ‘mis-influencers,’ with a history of pushing pro-industry narratives and misleading narratives, including the prolific scientist Frédéric Leroy and the Meat Institute’s Chief Strategy Officer, Eric Mittenhal.^{162 163} Panels will highlight pasture-based livestock production as more sustainable than confinement systems abroad and promote livestock as part of climate solutions. The closing session will create a document framing Brazil’s livestock sector as environmentally responsible and essential to global food security, with the intention of it being presented at COP30.
	6-7 November COP30 Farmers’ Summit <i>Brasília</i>	The COP30 Farmers’ Summit, organised by the World Farmers’ Organisation (WFO) in partnership with Brazil’s CNA, is being held in Brasília in the days preceding COP30. The summit is pitched as a ‘farmer-led’ event to bring agricultural voices into global climate policy. However, WFO is known for its pro-industry stance, and representation of farming organisations closely aligned with agribusiness over small-scale farming interests, such as CNA in Brazil, and the national farmer unions in the UK and US. The Italian member, Coldiretti, has in fact been the focus of protests from farmers themselves due to the lobby group’s lack of representation of issues key to them.¹⁶⁴ Landbrug & Fødevarer (the Danish Agriculture and Food Council), another member, is a member of the EU’s agribusiness lobby Copa-Cogeca.¹⁶⁵

D Mato Grosso, home to Brazil’s largest cattle herd (over 34 million in 2023), is a symbol of the country’s agricultural strength and is the largest emitter of agricultural greenhouse gases in Brazil. In 2023, Mato Grosso emitted approximately 298.6 million tonnes of CO₂ equivalent, making it the second-highest overall in Brazil behind Pará (312 million tonnes). The main sources are livestock enteric fermentation, manure management and land-use change, especially deforestation. See: Observatório do Clima. (2024). Sistema de Estimativas de Emissões de Gases de Efeito Estufa (SEEG). www.seeg.eco.br.



5. Brazil's NDC - undermined by Big Agriculture

The trajectory of corporate influence seen in the lead-up to COP30 builds on the long-standing foundation of agricultural exceptionalism in Brazil. In this chapter we look at how this has already shaped Brazil's second NDC, submitted in November 2024.^E As the mechanism through which countries outline their contributions toward the goals of the Paris Agreement, NDCs are central to the COP process. As COP30 president, Brazil's own NDC and its stance on agribusiness-related issues will significantly influence the overall ambition of the conference.

Brazil's first NDC committed to reducing greenhouse gas emissions by 43% by 2030, and its updated NDC, sets a new target to reduce emissions 59-67% by 2035, compared to 2005 levels.¹⁶⁶ However, as shown in a recent study, Brazil's livestock sector's emissions are projected to reach between 0.42 and 0.63 gigatonnes of CO₂ equivalent (GtCO₂e) by 2030, far exceeding the limit of 0.26 GtCO₂e needed to achieve its first NDC target, let alone its updated target.¹⁶⁷

This gap illustrates how Brazil's headline ambition is undercut by its approach to addressing agricultural emissions, and industry lobbying, which has significantly weakened many of the legislative tools and policies that are critical to achieve goals set out in the NDC. In this section, we present new analysis of these structural contradictions and weaknesses, with particular attention to their implications for agricultural emissions.

5.1 Methane omissions

A major omission in Brazil's NDC is its failure to adequately address methane emissions. The measures to address the country's outsized agricultural methane emissions, which make up around 75% of all of Brazil's methane emissions, are completely absent.

Methane emissions are only mentioned twice in the NDC: first, in relation to the waste sector and second, in the energy transition chapter. It makes no explicit reference to methane emissions from agriculture, nor to the significant role its agribusiness giants play in this. This glaring gap has received little attention, despite Brazil being a signatory to the Global Methane Pledge.



Industry pressures Brazil to adopt controversial methane measurement: GWP*

Global Warming Potential Star (GWP*), is a controversial way to measure methane that is gaining traction due to the lobbying of Big Meat and Dairy giants and their industry associations. The Intergovernmental Panel on Climate Change (IPCC), which provides the scientific assessments that inform COP negotiations, has explicitly rejected GWP* for national climate accounting, stating that it *'does not capture the contribution to warming that each methane emission makes.'*¹⁶⁸ This opinion is shared by other scientists, who have expressed deep concerns at the recent attempts by New Zealand and Ireland to change the way methane is measured in an effort to protect their large livestock industries.¹⁶⁹

Brazilian industry associations, supported by JBS and others, work closely with international platforms like the Global Roundtable for Sustainable Beef (GRSB) and the International Beef Alliance (IBA) to legitimise the use of GWP*¹⁷⁰ and suggest that the livestock sector could *'be neutral with regards to the warming caused by methane emissions by 2040'*.¹⁷¹

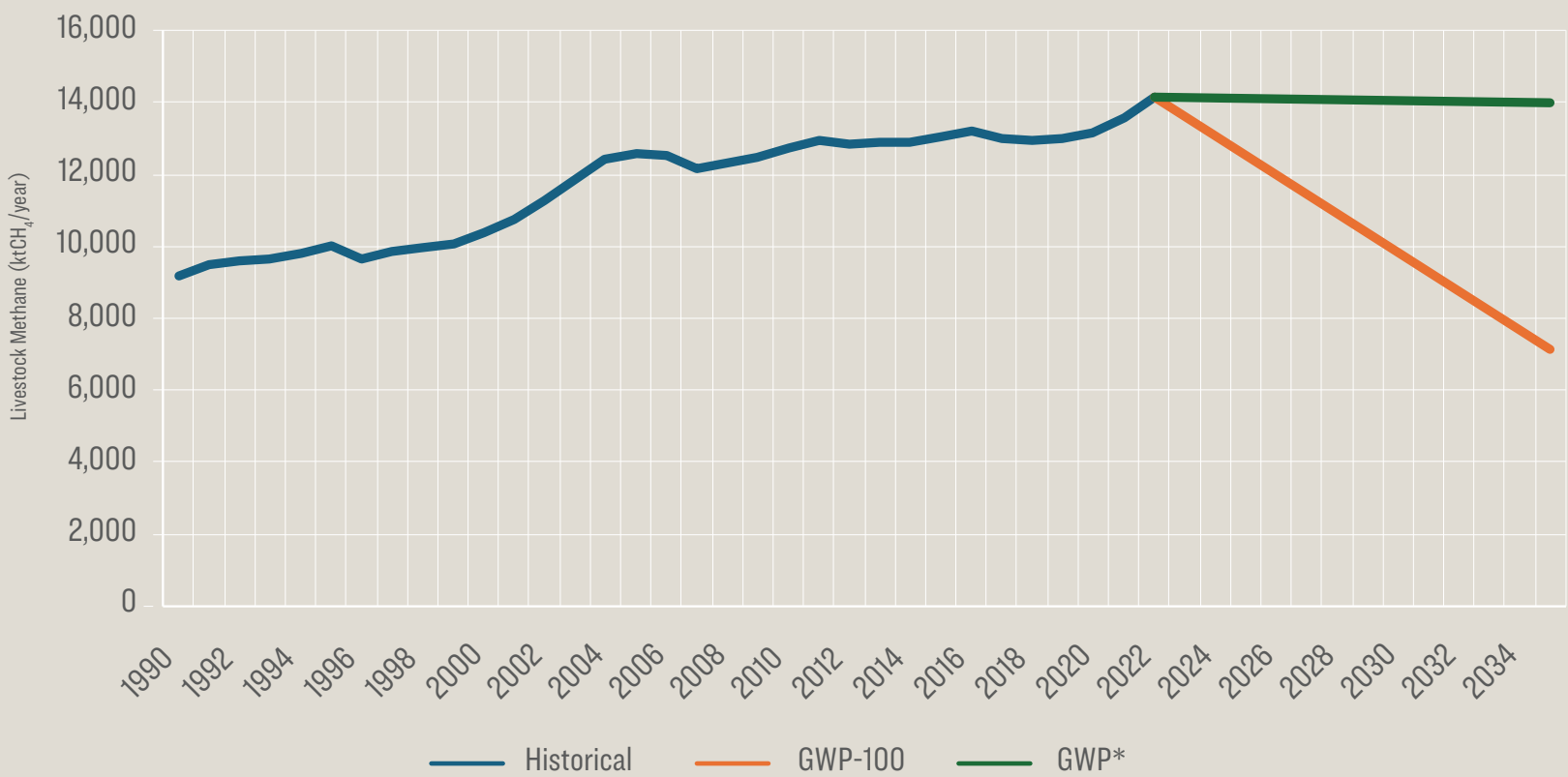
Frank Mitloehner, one of the main proponents of GWP*, has received nearly \$3 million for his CLEAR research centre from a foundation linked to JBS, Cargill and Tyson Foods, among others.¹⁷² He has promoted GWP* across South America, including at a JBS-hosted methane and agriculture forum in Brazil in May 2022, together with Eduardo Assad, a former Embrapa researcher.

In May 2024, Myles Allen, the scientist who created GWP*, told attendees of an agribusiness conference in Brazil that they could make history at COP30, if they could convince governments to introduce warming-based emissions accounting into the UNFCCC.¹⁷³ In his presentation he also claimed that if methane emissions fell by 6% over 20 years (3% per decade), CO₂e CO2 warming equivalent would be zero. He said this would be achieved through technical measures, such as manure management and the use of feed additives, showing comparisons of a closed power station and a herd of cattle with gently declining methane, to signify that neither were causing warming anymore.

MAPA and Embrapa have supported calls for changes in how livestock emissions are accounted for. In 2025, this included a new social media campaign by Embrapa's 'Beef Intelligence Center' in favour of adopting GWP*.¹⁷⁴ CNA has called for the use of GTP, a metric similar in effect to GWP*,¹⁷⁵ in COP negotiations.^{176, 177} References to Brazil's use of GTP also appear in official UNFCCC inventories.¹⁷⁸

If Brazil adopts GWP* or the so-called 'no additional warming' approach to methane, the country could claim 'climate neutrality', or even 'cooling' by investing in small methane emissions reductions, while maintaining its vast livestock sector.¹⁷⁹ The strategy being pursued by the industry lobby risks fundamentally undermining the scientific credibility and ambition of global methane mitigation commitments at a critical moment for climate action.

How GWP* benefits Brazil's livestock producers ^F



^F Brazil's NDC with its 2035 target of reducing GHG emissions by 59-67%, commits it to an average of 950 MtCO₂e reduction per year. In 2022, methane from livestock represented about 21% of Brazil's net economy emissions as measured by GWP100 which would then suggest livestock methane emissions under the overall 2035 target would need to fall to around 200 MtCO₂e. This graph translates that estimated emissions trajectory into physical methane emissions (i.e. ktCH₄) under the GWP100 and GWP* metrics. Whereas GWP100 requires heavy emissions cuts, GWP* allows the target to be achieved with the same level of methane emissions as today.

5.2 Contradictions inherent in the NDC

The policies and fiscal tools that Brazil aims to use to bring down its agricultural emissions are beset with contradictions and loopholes. Below we analyse these key policy levers that the government states will help it achieve its NDC commitments, and how they fail to adequately address agriculture's outsized emissions.

5.2.1. The Climate Plan

At the centre of its NDC, lies Brazil's Climate Plan.^G However, this is being consistently undermined as agribusiness interests fight to weaken its regulation and openly critique it.

According to an Instagram post from the FPA, *'the plan imposes obligations that make little sense and ends up punishing precisely those who already produce responsibly'*.¹⁸⁰ In other posts, the FPA portrays agribusiness as unfairly targeted and suggests that deforestation is driven by settlement areas, land reform zones and Indigenous territories, which are the government's responsibility. At the same time, the sector insists that its role in preserving nature is ignored, claiming that rural properties already contribute to carbon removal through areas of legal reserve and permanent preservation.¹⁸¹

The FPA calls for adjustments to the Climate Plan, with the aim of *'valuing producers and strengthening Brazil,'* asserting that *'those who plant solutions cannot be seen as the problem.'* It points to the Forest Code, the Rural Environmental Registry (CAR)

G Brazil's Climate Plan, which will guide national responses to climate change through to 2035, is structured around two central pillars: mitigation and adaptation. In addition to the national strategies for mitigation and adaptation, the plan encompasses sectoral initiatives – seven focused on mitigation and 16 on adaptation. Notably, agriculture and livestock are placed at the forefront of both sets of sectoral plans (www.gov.br/mma/pt-br/composicao/smc/plano-clima/apresentacao-plano-clima-atualizada-mai24-lgc-1.pdf).

and the government's pledge to achieve zero deforestation by 2030 as evidence that Brazil is already a global reference for sustainability, and that the realities shown in the Climate Plan could undermine the sustainability credentials and international image of Brazilian products at COP30.¹⁸²

5.2.2. The Tax Reform

Brazil's 2023 Tax Reform^H is referenced in Brazil's updated NDC as a financial instrument to support the ecological transition, through a 'selective tax' on the production, extraction, sale or import of goods and services that are harmful to health or the environment'.¹⁸³ However, lobbying by powerful agribusiness coalitions has systematically weakened these measures. Through fiscal privileges for pesticides, animal protein and large-scale export commodities, the reform consolidates a tax structure that rewards intensive, high-emission production systems. This perpetuates Brazil's dependence on deforestation-driven exports while shielding the sector from environmental responsibility. This means that rather than supporting Brazil's climate commitments, the Tax Reform risks deepening structural inequality and carbon lock-in. This results from the industry's successful attempts to position itself as essential to national development and food security and portray environmental regulation as a threat to productivity. In doing so, agribusiness has successfully ensured a tax system that protects corporate profits.

In 2024 alone, tax exemptions for agriculture and agribusiness, for example on the purchase of inputs like fertiliser, totalled R\$158 billion (\$29 billion).¹⁸⁴ I The ten

H The 2023 Tax Reform restructured the consumption tax system, creating the National Regional Development Fund, and introducing mechanisms such as a Selective Tax on environmentally harmful goods, favourable taxation for biofuels and green hydrogen, and incentives for recycling and circular economy initiatives.

I As outlined in the reference, some of these exemptions have existed since the 1990s but the cumulative level of exemption signifies how Brazil's Tax Reform will not address the emissions of Brazil's most polluting industry.

companies most favoured avoided at least R\$26 billion (\$4.8 billion) in taxes – nearly ten times the resources already distributed by the Amazon Fund, which invests in projects to protect and restore the forest.¹⁸⁵

JBS leads the rank, avoiding R\$6.4 billion (\$1.2 billion) in federal taxes. Such fiscal policies distort Brazil's tax system, privileging multinational corporations linked to deforestation, pollution and biodiversity loss, with the Brazilian population left to carry the social and health costs.¹⁸⁶

5.2.3. ABC+

Another central component of the NDC, the ABC+ (2020–2030) plan seeks to strengthen sustainable, resilient and productive agricultural systems.¹⁸⁷ It is a plan widely touted by industry as an example of how it is adhering to sustainability measures.

The ABC+ plan includes measures such as expanding technical solutions, and production systems to reduce emissions, backed by ambitious targets such as 'rehabilitating 15 million hectares of degraded pastures and increasing the area under zero tillage from 25 million hectares to 33 million hectares by 2020'.^{J188}

However, a recent study reveals that credit disbursed under the plan to recover degraded pastures in the Cerrado has proven largely ineffective.¹⁸⁹ Around 75% of analysed areas remained unchanged four years after funding, with average pasture quality improving by only 3 percentage points and no significant impact observed in severely degraded areas. At most, the programme contributed just

2.5% towards the ABC plan's initial goal of recovering 15 million hectares by 2020. The study found that even with complete recovery of all credit-supported areas, the maximum contribution would have been 18%.¹⁹⁰

5.2.4. Carbon market failures

The Brazilian Emissions Trading System (SBCE) which regulates Brazil's carbon market came into effect in December 2024. However, it is significantly undermined by the exclusion of agricultural emissions, which means at present, the SBCE can only regulate around 30% of Brazil's greenhouse gas emissions,¹⁹¹ undermining a major component of Brazil's NDC.

This shortcoming is the result of agribusiness industry lobbying to be kept out of the regulated carbon market system. The sector claims there is '*no adequate methodology*' to measure and price its emissions, particularly those linked to land-use change and livestock.¹⁹² Through this the country's largest emitting sector has evaded the 'polluter pays' principle which is supposedly inherent in carbon markets.

Although resistant to formal carbon regulation, agribusiness has no issues with advancing its own methodologies and tools for measuring and offsetting emissions. It uses these to position itself as a climate leader, and to benefit from selling carbon credits in voluntary carbon markets.

For example, Minerva Foods profits from Brazil's voluntary carbon market by promoting its large-scale projects to international investors via its subsidiary My-Carbon. This company provides limited transparency and geospatial data and has high deforestation risks in its supply chains, suggesting carbon credits serve more as financial and reputational asset than an evidence-based tool for delivering real climate benefits.¹⁹³

J Brazil introduced the ABC Plan ('Low-Carbon Agriculture Plan') in 2009 as part of its national climate change policy. The plan was later updated and rebranded as ABC+ (2020–2030), a national strategic agenda to strengthen sustainable, resilient and productive agricultural systems. ABC+ seeks to advance adaptation and mitigation measures while consolidating a low-carbon pathway for Brazilian agriculture and livestock.

The industry's take up of voluntary markets presents a glaring contradiction. If agribusiness can promote a growing portfolio of carbon-reduction initiatives for voluntary markets, it suggests finding methodologies to calculate its emissions reductions within the SBCE are entirely feasible.

Agribusiness efforts include:

- Carbon on Track (2023)¹⁹⁴ – created by the non-profit environmental institute Imaflora, is a third-party platform supporting companies, producers, and investors and is mainly used in voluntary carbon market projects.
- Carbon Gado (2024)¹⁹⁵ – developed by Embrapa, calculates greenhouse gas emissions in beef cattle production to help livestock producers and agribusinesses 'demonstrate progress toward *low-carbon beef* certification'.
- ABC+ Calc (2025)¹⁹⁶ – developed by MAPA, Embrapa and Instituto 17, the platform estimates greenhouse gas emissions and carbon removals across agricultural production chains.

Low-Carbon Livestock Calculator - CPBC (in final testing phase 2025)¹⁹⁷ – developed by Embrapa, estimates the balance between emissions and carbon sequestration in livestock systems aiming to strengthen Brazil's leadership in promoting *low-carbon livestock* and provide technical backing for national and international climate diplomacy, including during COP30.

5.2.5. The Forest Code and the Rural Environmental Registry (CAR)

Brazil's Forest Code requires landowners to preserve native vegetation on a set portion of their land, ranging from 80% in the Amazon, to 20% in grasslands. The CAR is a mandatory electronic register for all rural properties to ensure compliance with the Forest Code.

The Forest Code is referenced in Brazil's NDC as a key legal measure to support the country's climate mitigation and adaptation efforts, particularly in relation to land-use regulation and the protection of native vegetation on rural properties.

Agribusiness representatives claim the Forest Code is one of the strictest environmental frameworks in the world. However, in its current form it is beset with problems.

When the Forest Code was revised in 2012, lobbying from agribusiness and other sectors led to significantly weakened environmental protections,¹⁹⁸ with further attempts to weaken it since.¹⁹⁹ This includes bills pushed by the ruralist caucus which permit grazing in Legal Reserve areas; expand the possibility for properties within areas illegally cleared after 22 July 2008 to be 'regularised' (deemed traceable to legal sources), and which removed the largest beef producing state of Mato Grosso from the Legal Amazon.^K

The CAR also has significant weaknesses. In 2022, of the 56.5 million hectares of undesignated public forests in the Amazon, 18.6 million (33%) were illegally registered on the CAR.²⁰⁰ Between 2019 and 2024, 14,223 properties in Brazil's Legal Amazon altered their CAR registrations 15,750 times, erasing 4.9 million hectares from official records to remove evidence of deforestation. Ineffective oversight and enforcement of the CAR has enabled farmers to continue to access rural credit, including subsidised loans, even where there are environmental embargoes for illegal deforestation, exploitative labour practices and encroachment with Indigenous lands.²⁰¹

K The Legal Amazon is an administrative area encompassing the states of the Amazon region, making up 61% of Brazil's territory. It covers the whole Amazon biome and parts of the Cerrado and Pantanal.

In 2025, it was reported that the found that the Apyterewa Indigenous people had to reoccupy areas within their Territory where farms were illegally operating and that 177 rural properties in this area had been formally registered in the CAR.²⁰²

Brazil's NDC submission emphasises the need to strengthen compliance with the Forest Code, through strengthened validation of the CAR and environmental regulation. However, the plan does not acknowledge or set ways to rectify the serious enforcement issues relating to the Code and CAR much of which has been found to be connected to political and agribusiness resistance, much of this stemming from agribusiness linked deforestation.²⁰³

Despite Brazil's national commitments and the agriculture sector's claims of climate leadership, Brazil's current NDC falls short. As the largest contributor to Brazil's greenhouse gas emissions, the agriculture sector might be expected to provide a similarly significant share of its nationally determined contribution to the Paris Agreement. Instead, the soft approach to big landowners and big agricultural companies that are buying from these farms, leading to weak or contradictory policies, as outlined above, undermine the potential to deliver tangible emission reductions.





6. Two faces of Brazil's agriculture

Agricultural exceptionalism granted to an export oriented, corporations-heavy industry is contrasted by a thriving agroecological farming system that genuinely supports and feeds Brazil's population in a more sustainable way. Small farmers, which constitute 77% of Brazilian farmers and produce over two-thirds of food consumed within the country, called to reprioritise this part of the food system.²⁰⁴

The current Lula presidency has swiftly and effectively addressed the growing hunger crisis in Brazil - which saw 33 million citizens going to bed hungry - and in July 2025 the FAO removed Brazil from the UN Hunger Map.²⁰⁵ This success was driven by holistic strategies that look to address hunger in a long-term, sustainable way, such as “The Food on the Plate” and the PLANAPO (national plan for agroecology and organic farming) plans which seek to embed sustainability and human rights across food supply chains, for example mandating that 30% of school meals were procured from family farms.²⁰⁶

In relation to climate impact, since Brazil submitted its updated NDC in November 2024, MAPA has updated several programmes such as the Crop Plan (*Plano Safra*, Brazil's annual agricultural credit and support programme), Living Soil (*Solo Vivo*) and Green Path Brazil (*Caminho Verde Brasil*) in order to present Brazilian agriculture as climate-responsible ahead of COP30. The 2025/26 Crop Plan expands credit for producers adopting environmentally sound practices, tying access to lines of funding to compliance with the Agricultural Climate Risk Zoning and offers reduced interest rates to those employing conservation techniques.²⁰⁷ *Solo Vivo* promotes sustainable soil management to reduce carbon emissions and improve fertility, while *Caminho Verde* plans to channel resources into restoring degraded land, intended to show that production growth and environmental recovery can coexist. MAPA frames these instruments as essential to ensuring Brazil's credibility in the international climate debate.²⁰⁸

In addition, MAPA is preparing to launch the Brazilian initiative Raiz (Resilient Agriculture Investment for Net Zero Land Degradation), with the support of the Ministries of Agrarian Development and Family Farming (MDA) and Fisheries and Aquaculture (MPA), in partnership with the UN Food and Agriculture Organisation (FAO) at COP30. The initiative was presented at the FAO Livestock summit in Rome and aims to support rural development, climate resilience, and biodiversity, positioning Brazilian family farming as integral to climate action.²⁰⁹

Government investment in the transition for the agricultural sector is also at an all-time high with the Crop Plan's low-carbon agriculture credit line, RenovAgro, allocating R\$7.68 billion/\$1.45 billion in 2024/25. However, this still represents only 1.9% of the total agricultural budget and inbuilt structural issues means financial support favours the largest producers, with R\$516 billion /\$96 billion allocated to agribusiness whereas smaller family farms received just R\$89 billion/\$16.53 billion.²¹⁰

Brazil's recent policies show signs of acknowledging the need for a more holistic approach to food system transformation, one that supports climate resilient agro-ecological farms²¹¹ and better feeds its population. However, the power of Big Ag is deeply embedded in Brazil's political institutions, which continues to give special treatment to its export-oriented agribusinesses, including failing to regulate the emissions of meat giants.



7. Conclusion

As the world gathers for COP30, the stakes could not be higher. Last year was the hottest year ever recorded, with global temperatures temporarily surpassing the 1.5°C threshold for the first time: a stark reminder that we need urgent action now.

Yet, one of the largest drivers of the climate crisis, animal agriculture, remains largely unaddressed. Research shows that even if fossil fuel emissions were eliminated immediately, emissions from the global food system alone would make it impossible to meet the goals of the Paris Agreement and limit warming to 1.5°C.²¹²

Globally, agribusiness has succeeded in convincing politicians of ‘agricultural exceptionalism’, avoiding regulations faced by other high-emitting sectors. As illustrated in this report, this contradiction is particularly evident in Brazil, the COP30 host.

Despite the government’s recent successes in slowing deforestation,²¹³ and supporting smaller farms and vulnerable populations in its fight to eradicate hunger, major issues with Brazil’s climate plans, such as weak enforcement and exclusion of any measures to address agricultural methane in its NDC,

leave a question mark over whether the country will take the necessary steps to regulate its most polluting industry.

The privileged position of Big Meat and other agribusiness is maintained through the entrenched and pervasive control that corporate interests exert over both political processes and public narratives, to suggest it feeds and fuels Brazil's people and economy. The reality is an industry focused on high value export commodities and not on staple foods and one with deep rooted pay inequalities, labour rights issues and crime. Now we see this industry, well-versed in misinformation campaigns and with close ties to levers of power, poised to shape the COP30 agenda itself.

At COP28 in Dubai, food system transformation finally made it on the agenda, with over 130 countries signing the Declaration on Sustainable Agriculture. COP30 was supposed to be the conference, where significant headway would be made on how we approach food and agriculture, and countries committed to include food systems and methane into their NDCs.²¹⁴ While the focus may have shifted slightly, the Brazilian Presidency has included agriculture as the third axis for the conference agenda and as one of the “super-leverage points”, where Brazil's experience can contribute with concrete solutions.²¹⁵

The failure to even acknowledge the need to reduce of agricultural methane emissions, despite being one of the first signatories of the Global Methane Pledge, illustrates how entrenched agribusiness interests are in policymaking, and is a symptom of the extreme levels of agricultural exceptionalism. Alongside urgently halting deforestation, and driving energy transition, the absence of measures to cut agricultural methane leaves a large hole in the strategy, making it impossible for Brazil to meet its climate goals.

In this environment, instead of climate leadership, the risk is that COP30 turns into a platform which legitimises the narratives of Big Agriculture, such as technological optimism and downplaying the importance of biogenic methane by changing the metrics. This threatens not only climate targets, but Brazil's agricultural future. Already, 28% of the country's farmland lies beyond optimal climatic conditions, a figure expected to rise to 74% by 2060 as temperatures climb and droughts intensify.²¹⁶

In 2024, extreme droughts in the Amazon led to record-low river levels and severely reduced harvests in coffee-producing regions in the southeast,²¹⁷ while record floods in Rio Grande do Sul affected more than 206,000 rural properties.²¹⁸ Brazil's livestock sector, particularly cattle, is also increasingly at risk. Rising temperatures and prolonged dry seasons reduce pasture quality and water availability, disrupt feed and herd management, increase disease risk, and lower weight gains and fertility.²¹⁹ Heat stress also affects dairy cattle, with milk yields projected to fall by up to nine litres per cow per day by the end of the century.²²⁰

Meaningful climate progress requires governments to confront the ongoing barrier of vested interests, ensuring that genuine corporate accountability and transparency are at the centre of climate strategy. When it comes to food system transformation, this is particularly true for major meat and dairy producing and consuming countries, such as Brazil.

More evidence of the meat industry's ties to deforestation, human rights abuses and greenhouse gas emissions continues to emerge in the lead up to COP30. Recent years have also seen increased grassroots mobilisation across Brazil, with Indigenous leaders and environmental movements denouncing industry actions as a direct threat to forests and climate.²²¹ Lula's government also has some remarkable recent successes in its pocket: it managed to eradicate hunger through its renewed

focus on supporting climate resilient agroecological farm that actually feed Brazil's population and slow soaring deforestation rates.

As world leaders gather in Belém, Brazil can choose which face it wants to show to the world: the one in which communities, climate and health are at the centre of the agenda, or vested interests that promote status quo with a green mask. COP30 is a critical opportunity to ensure that when it comes to food systems, climate science rather than corporate influence, shapes our path forward. The climate 'solutions' presented and promoted by the industry must be carefully scrutinised.

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