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INTELLIGENCE BRIEF

The LAC-EU Coffee Trade:

Climate Risk, Regulatory Opportunities, and the Case for Social-Ecological Measurement

Prepared for the Group of Latin American and Caribbean Ambassadors (GRULAC)

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EXECUTIVE SIGNAL

THE CORE MESSAGE

Coffee is one of Latin America's most valuable agricultural exports and the EU's largest coffee source. This sector directly employs over 14 million people across the region. Yet under current climate trajectories, up to 50% of land currently suitable for Arabica coffee may become unsuitable by 2050, and the EU is simultaneously introducing the most demanding sustainability and traceability requirements in the history of agricultural trade. The combination of ecological threat and regulatory transformation creates both an existential risk and a strategic opportunity for LAC producing countries. Dialectik's Social Network Performance Indicators (SNPI) framework — the only peer-reviewed methodology that quantifies the connection between social collaboration and environmental outcomes — offers the measurement architecture needed to navigate this transition.

€28.8B	60%+	Up to 50%	14M+
European coffee imports (2024)	Global coffee from LAC	Arabica land loss by 2050	Jobs in LAC coffee sector

1. THE MARKET: LAC-EU COFFEE TRADE IN NUMBERS

1.1 The Scale of European Demand

The European Union is the world's largest coffee market. In 2024, **Europe imported 3.3 million tonnes of green coffee**, accounting for approximately 30.7% of global consumption. The EU imports over 46 million 60-kilogram bags of green coffee beans annually (USDA, December 2025), with total European coffee imports valued at approximately €28.8 billion in 2024. Roughly 70% of European imports are Arabica — the variety most vulnerable to climate change and the variety predominantly produced by LAC countries.

The EU does not grow coffee. Every bean consumed in Europe is imported, making coffee trade structurally essential to European supply. Germany alone imports over €5.6 billion in coffee annually, followed by France, Italy, Belgium, and the Netherlands. The European branded coffee shop market grew 4.7% in 2024/2025, with over 51,000 outlets across the continent, reflecting sustained premiumisation of consumer demand.

1.2 Latin America's Dominance

Latin America produces over **60% of the world's coffee and 80% of global Arabica production**. The region is the primary supplier to the EU market. The following table presents production volumes for the key LAC producing countries targeted in Dialectik's proposed assessment:

Country	Production (M bags)	Key Export Markets	Sector Significance
Brazil	69.9	Germany, USA, Italy	World's #1 producer; record 50.4M bags exported 2024
Colombia	14.8	USA, EU, Japan	World's #3 producer; famed for Arabica quality
Honduras	5.5	EU, USA	Central America's largest producer
Guatemala	3.7	EU, USA, Japan	25% of population in coffee sector
Mexico	4.0	USA, EU	Growing organic/specialty segment
Costa Rica	1.4	EU, USA	High-quality Arabica; only Arabica by law
El Salvador	0.6	EU, USA	Dialectik pilot country; 60% production loss 2012–2013

Sources: USDA Foreign Agricultural Service (December 2025); ICO; FAOSTAT. Figures in million 60-kg bags, 2024/25 marketing year.

1.3 The Trade Architecture

The EU's coffee trade with Latin America is governed by a complex web of bilateral and regional agreements, each with distinct provisions affecting market access, tariffs, and sustainability standards:

EU–Central America Association Agreement (Applied since 2013)

Covers Honduras, Nicaragua, Panama, Costa Rica, El Salvador, and Guatemala. **Coffee enters the EU duty-free** under this agreement, alongside prawns, pineapples, and melons. Central America removed tariffs on 67% of agricultural lines. The agreement includes provisions for geographical indications — in 2025, the EU extended protection to 11 new GIs from Central America, several of which are coffee-related.

EU–Andean Trade Agreement (Applied since 2013; Ecuador joined 2017)

Covers Colombia, Peru, and Ecuador. Provides preferential access for Andean agricultural exports to the EU, with specific provisions for coffee. The agreement protects 116 EU GIs and several Andean GIs. Andean agricultural exports to the EU exceed EU agricultural exports to the Andean countries.

EU–Mercosur Partnership Agreement (Signed January 2026; Provisional application from May 2026)

Covers Brazil, Argentina, Uruguay, and Paraguay. After 25 years of negotiation, EU countries endorsed the agreement by 21–5 vote in January 2026. **This is the most significant new development in LAC-EU trade architecture.** Critically, the agreement explicitly states that **all products entering the EU under this deal must be deforestation-free under the EUDR**, including coffee. The European Parliament referred the agreement to the European Court of Justice in January 2026 for a legal opinion, which could take up to two years — creating a period of regulatory uncertainty that particularly affects Brazil's coffee exports to Europe.

EU–Mexico Modernised Global Agreement (Concluded January 2025)

The modernised agreement expands tariff elimination, protects 568 EU GIs, and simplifies trade procedures. The European Commission presented proposals for signature in September 2025. This creates new conditions for Mexico's coffee exports, particularly in the specialty and organic segments.

2. THE THREAT: CLIMATE RISK TO LAC COFFEE PRODUCTION

THE CENTRAL RISK

Under moderate warming scenarios, up to 50% of land currently suitable for Arabica coffee will become unsuitable by 2050. In Central America specifically, suitable growing areas could contract by 38–89%. Under high-emission scenarios (RCP 8.5), the consequences are structural and irreversible. This is not a future problem — Brazil's 2024 drought was the worst in 70 years, and coffee prices hit a 47-year high.

2.1 Regional Climate Projections

The scientific consensus on coffee's climate vulnerability is robust and alarming. Key projections from peer-reviewed literature include:

Arabica yield decline: A 2025 continental-scale modelling study (published in Agricultural Systems) projects Arabica yields will decrease by **23–35% in Latin America** under climate change scenarios, with production shifting toward less-impacted high-altitude and low-latitude areas.

Suitable land reduction: Research published in PLOS ONE confirms that **50% of land currently suitable for Arabica production will no longer be suitable by 2050**. In the hot, dry growing zones of Brazil, Central America, and parts of India, nearly 80% of current coffee area will become unsuitable.

Central American contraction: IPCC projections indicate that the Central American coffee-growing area could shrink by **38–89% by 2050**, with minimum altitude for coffee production rising from approximately 600m to 1,000m above sea level. Even under the least severe scenario (RCP 2.6), over half of current Central American coffee areas will decline from excellent or good to moderate or marginal suitability.

Pollinator decline: Research by Imbach et al. demonstrates a **73–88% reduction** in areas suitable for coffee growing by 2050, coupled with 8–18% decline in coffee-pollinating bee diversity — compounding agricultural losses through ecological cascade.

Drought as spatial phenomenon: Research by Diaz et al. (2026) demonstrates that drought must be analysed not only temporally but in its spatial extent — understanding how large portions of territory are impacted simultaneously. Their machine-learning approach to crop yield prediction, using spatiotemporal drought area changes as input, provides early warning capabilities directly applicable to coffee production planning. Earlier work on the Central American Dry Corridor (Koshnazar et al., 2021) developed spatiotemporal drought risk indices incorporating resilience and heterogeneous vulnerability factors for the Lempa transboundary river basin — a region encompassing major coffee zones in El Salvador, Guatemala, and Honduras.

Temperature sensitivity: Each 1°C increase in temperature causes approximately 14% yield reduction for Arabica. Continuous exposure to temperatures above 30°C can severely damage coffee plants, stunting growth and degrading bean quality. This is already being observed across LAC coffee zones.

2.2 Country-Level Vulnerabilities

Country	Climate Risk Profile	Recent Impact Evidence
Brazil	Southeast growing zones face high risk; suitable area projected to fall from 81% to 62% of current harvest zones by 2050	2024 drought worst in 70 years; drove coffee prices to 47-year high globally
Colombia	Share of Arabica in suitable areas projected to fall from 56% to 45%; increasing rainfall disrupting production cycles	Production rebounded to 14.8M bags in 2024/25 after climate-driven declines in 2021–23
Honduras	Suitable area share may plummet from 53% to just 12% by 2050 (Rabobank 2026)	Coffee rust epidemic 2013–16; COVID-19 lockdowns reduced yields through missed fertilization windows

Guatemala	Some high-altitude zones may retain or improve suitability, but lower-altitude zones face severe decline	25% of population dependent on coffee; rust and price volatility compounding
Mexico	Projections show up to 98% of current growing area could become unsuitable under worst-case scenarios	Central Veracruz production decline; economic value rose but socioeconomic indicators worsened
El Salvador	Small country, high exposure; temperatures projected to increase up to 2.4°C by 2050 under RCP 4.5	**Lost 60% of coffee production 2012–13 (rust + social-institutional collapse). Dialectik pilot country.**
Costa Rica	Mixed projections: some areas may improve by 2080 after initial decline by 2050	Only Arabica by law; high-quality positioning provides some buffer but not immunity

Sources: Rabobank (March 2026); PLOS ONE; Imbach et al.; IPCC AR5; Teodoro et al. (2024); Diaz et al. (2026); Koshnazar et al. (2021).

2.3 The Critical Insight: Climate Risk Is Social Risk

The most important finding from Dialectik's published research is that **climate risk does not land on ecosystems alone. It lands on communities, labour networks, and governance arrangements** — and these social dimensions determine whether adaptation succeeds or fails.

El Salvador's 60% production loss in 2012–2013 was not purely agronomic. It was simultaneously a social and institutional collapse. Coffee rust could have been managed with coordinated stakeholder response; instead, fragmented governance, weak collaboration networks, and disconnected institutions amplified what began as a biological stress into a structural crisis. **Ecological stress and social fragility amplify each other.** This is the central finding that distinguishes Dialectik's approach from conventional climate risk assessment.

3. THE REGULATORY TRANSFORMATION: WHAT IS CHANGING NOW

3.1 EU Deforestation Regulation (EUDR) — Directly Impacts Coffee

CRITICAL REGULATION FOR COFFEE

The EUDR is the single most important new EU regulation affecting LAC coffee trade. It mandates that all coffee placed on the EU market must be verified as deforestation-free, traceable to the exact plot of land where it was grown, and accompanied by geolocation data and a due diligence statement. Non-compliance carries fines of up to 4% of a company's EU turnover.

Current status (April 2026): The EUDR was adopted in June 2023 but has been postponed twice. The current enforcement date is **30 December 2026 for large and medium operators**, with micro and small enterprises given until **30 June 2027**. The European Commission must present a simplification review by 30 April 2026 — this review is expected imminently. A new Delegated Regulation expanding the EUDR's product scope (potentially including instant coffee and additional derivatives) is expected in the April 2026 Simplification Package.

What the EUDR demands: Every coffee shipment entering the EU must demonstrate that it is (1) deforestation-free (produced on land not deforested after 31 December 2020), (2) legally produced under national laws, and (3) fully traceable via geolocation coordinates. For smallholder producers — who represent the vast majority of LAC coffee farming — this creates enormous practical challenges.

Country benchmarking: The EU Commission will classify producing countries as high, standard, or low risk for deforestation. This classification directly affects the level of due diligence required for imports from each country, creating differentiated market access conditions across the region.

Why this matters for GRULAC: The EUDR is the most concrete immediate threat to LAC coffee market access in Europe. Countries that cannot help their farmers comply risk effective exclusion from the EU's €28.8 billion coffee import market. **The tools to demonstrate compliance at regional scale do not yet exist.** Dialectik's SNPI framework provides the social accountability architecture that the EUDR implicitly demands but no current system delivers.

3.2 Carbon Border Adjustment Mechanism (CBAM) — Indirect but Significant

Important distinction: CBAM does **not** currently cover coffee or agricultural products directly. It applies to six high-emission sectors: steel, cement, aluminium, fertilizers, hydrogen, and electricity. Its definitive phase began 1 January 2026.

Indirect impact on coffee: CBAM's inclusion of **nitrogen fertilizers** directly affects coffee production costs. Coffee farming across LAC is heavily dependent on synthetic fertilizers, and CBAM will increase the cost of these inputs when imported into Europe — potentially affecting the economics of fertilizer-dependent coffee production systems and creating incentives for organic and agroecological alternatives.

Future scope expansion: The EU Commission is reviewing potential extension of CBAM to additional sectors by 2027–2028. While agricultural products are not currently scheduled for inclusion, the broader trend toward carbon-priced trade is clear. Countries that develop carbon accounting capacity now will be better positioned if and when the scope expands.

Signal value: Even without directly covering coffee, CBAM represents the EU's institutional commitment to pricing externalities at the border. Combined with the EUDR, it signals a regulatory direction in which social and environmental accountability in trade will only intensify.

3.3 Broader EU Sustainability Architecture

The EUDR and CBAM exist within a wider regulatory constellation that includes the Corporate Sustainability Reporting Directive (CSRD), the EU Green Deal, the Farm to Fork Strategy, and the EU's Global Gateway initiative (€70 million allocated specifically to support partner countries in transitioning to deforestation-free value chains). These are not isolated policies — they represent a structural shift in how the EU defines acceptable trade.

4. THE MEASUREMENT GAP: WHAT CURRENT TOOLS CANNOT DO

The current landscape of coffee sustainability assessment relies primarily on certification schemes (Fairtrade, Rainforest Alliance, UTZ/merged into RA), voluntary corporate sustainability reporting, and national agricultural extension services. While these systems serve important functions, they share a fundamental limitation:

THE GAP
No existing tool measures the social architecture of resilience. Certification tells you whether a farm meets minimum standards at a point in time. It does not tell you whether the stakeholder networks, governance arrangements, and community collaboration structures necessary for sustained adaptation are present, strengthening, or collapsing. Yet these social structures are precisely what determine whether climate adaptation succeeds or fails.

The EUDR demands traceability and deforestation-free verification. It does **not** yet require social dimension accountability — but the direction of travel is unmistakable. The European Commission's simplification review (due April 2026) and ongoing EUDR expert group discussions are actively considering how to ensure that compliance requirements reflect genuine sustainability, not just documentation.

This is where Dialectik's SNPI framework fills a structural gap. It provides the only peer-reviewed methodology that:

1. **Quantifies stakeholder collaboration** using social network analysis (adjacency matrices, centrality metrics, density, reciprocity)
2. **Correlates social network performance with environmental outcomes** — demonstrating that measurable social collaboration metrics predict positive ecological results
3. **Operates at low cost and high replicability** — designed for deployment across multiple national contexts without requiring large institutional infrastructure
4. **Is published in peer-reviewed literature** (Environmental Science and Policy, 2024 and 2026) — providing the scientific credibility that both regulators and institutional funders require
5. **Was piloted in a LAC coffee context** — specifically in El Salvador's coffee sector, under the conditions that this initiative would scale across the region

5. THE OPPORTUNITY: A REGIONAL SOCIAL-ECOLOGICAL ASSESSMENT

Dialectik proposes the **first integrated social-ecological climate vulnerability assessment of the LAC coffee sector**. This initiative combines state-of-the-art remote sensing and geospatial modelling with the SNPI social network framework to produce a dual-dimensional assessment that no other methodology currently offers.

5.1 Architecture

Phase	Scope	Outputs
Phase 1	Regional Climate Risk Assessment: integrated climate characterization, drought analysis with spatial extent modelling, and hydrological dynamics (soil moisture, runoff, infiltration) across LAC coffee zones under multiple climate scenarios	Spatial maps of climate risk; drought dynamics assessments; climate risk index identifying areas of highest exposure; scenario-based visualisations for decision-making
Phase 2	In-Depth Country Case Studies (Colombia, Costa Rica, El Salvador, Guatemala, Mexico): SNPI social network analysis; local researcher partnerships; community participation quality assessment; integration of agroforestry variables with hydrological modelling	Country-level social-ecological assessments; stakeholder network maps; governance quality indicators; analysis of shade management and agroforestry impacts on water regulation and climate resilience
Phase 3	Synthesis, Reporting, and Policy: financial risk analysis; scenario-based economic projections; social dimension dashboard with time-series capability; integrated risk visualisations combining ecological and social dimensions	Comprehensive regional report; policy recommendations; monitoring platform foundation for ongoing tracking; alternative scenario comparisons (conservative management vs. intensified shade vs. degradation pathways)

5.2 The Climate Risk Framework: An Integrated Approach

The environmental dimension of this assessment is grounded in a peer-reviewed **integrated climate risk analysis framework** developed by Dr. Vitali Diaz, Dialectik's co-founder and environmental scientist with deep expertise in flood and drought modelling, remote sensing, and hydrological systems. This framework has been published and applied in hydrology, drought analysis, and agricultural systems research, and is structured around three interconnected components:

Component 1: Climate Characterisation and Variability

This component analyses precipitation and temperature using historical datasets and climate projections to identify patterns, trends, and potential future scenarios. Using the **STRIVIng (Spatio-TempoRal distribution and Interannual VarIability)** analysis toolbox (Diaz et al., 2019), the framework captures how climate conditions are evolving and how variability may affect coffee agroecosystems over time. This enables the identification of both gradual shifts and extreme event frequencies that directly impact coffee yield and quality.

Component 2: Drought Characterisation and Hydrological Dynamics

Drought is analysed not only as a temporal phenomenon but crucially **in its spatial dimension** — estimating drought-affected areas simultaneously, which is critical for agricultural planning at a regional scale. This includes drought indices based on precipitation and evapotranspiration, as well as evaluation of soil moisture, runoff, and infiltration — the hydrological variables directly linked to coffee crop performance. Recent research (Diaz et al., 2026) has demonstrated the application of spatiotemporal drought area changes as input for machine-learning approaches to crop yield prediction, enabling data-driven early warning capabilities.

Component 3: Climate Risk Assessment

Risk is understood as the interaction between three elements: **hazard** (intensity and frequency of drought events), **vulnerability** (characteristics of the production system including land use, environmental conditions, and management practices), and **resilience** (capacity of the system to absorb impacts and recover). This approach draws on published spatiotemporal drought risk assessment methodology applied to the Lempa transboundary river basin in the Central American Dry Corridor (Koshnazar et al., 2021) — a region that directly overlaps with major coffee-producing zones in El Salvador, Guatemala, and Honduras. By integrating these components, **a climate risk index is developed to identify areas most exposed to climate stress and to support targeted interventions**.

AGROFORESTRY INTEGRATION

A key differentiator of this framework is its application to coffee agroforestry systems. Coffee production across LAC relies heavily on shade management, which regulates microclimatic conditions, improves soil structure, and enhances water infiltration. The integration of agroforestry variables enables comparison of alternative management scenarios — conservative management, intensified shade systems, or degradation pathways — and their implications for water regulation and long-term sustainability. This is precisely the kind of scenario modelling that governments and producers need for evidence-based climate adaptation planning.

Critically, this environmental framework is designed to integrate with Dialectik's social dimension. The outputs — spatial maps of climate risk, temporal assessments of drought dynamics, and integrated visualisations — are structured to interface with the SNPI social network analysis, creating a unified social-ecological risk picture. The objective is not only to identify *where* risk occurs, but to understand *why* it happens and *how* it can be reduced through better management, planning, and stakeholder collaboration.

5.3 What Makes This Different

Social and ecological dimensions with equal methodological weight. This is not an environmental study with a social annex. It treats community resilience, stakeholder networks, and governance arrangements as co-equal analytical dimensions alongside nature-based indicators. Both dimensions are grounded in peer-reviewed, published research.

An integrated scientific team. The initiative combines Dr. Daniel Teodoro's social-ecological systems and governance network expertise with Dr. Vitali Diaz's climate risk, hydrology, and remote sensing capabilities. Together, they provide the dual methodological competence — social network analysis and environmental modelling — that no single existing research programme offers for this sector.

Latin American-led research. The initiative insists that research is carried out by LAC scientists, institutions, and local knowledge holders. Building this network is simultaneously a methodological requirement and a developmental objective — embodying the technology transfer and knowledge sovereignty that LAC countries seek.

Peer-reviewed foundation. This initiative builds on published methodology across both dimensions: the SNPI framework (Teodoro et al., 2024; 2026) for social governance measurement, and the STRIVIng and drought risk frameworks (Diaz et al., 2019; 2026;

Koshnazar et al., 2021) for climate and hydrological analysis. Both have been validated in the field, in the peer review process, and in real-world applications.

Scalable and practical. The framework provides a practical and scalable tool that can be applied across different regions and crops, supporting climate resilience and sustainable agricultural development. The outputs are designed to translate complex data into actionable insights for governments, producers, and international organisations.

5.4 Strategic Value for Ambassadors

For GRULAC members, this initiative offers:

1. **Evidence-based positioning** in EU-LAC trade negotiations on sustainability requirements
2. **Proactive regional response** to EUDR compliance challenges, demonstrating LAC leadership rather than reactive adaptation
3. **SDG-aligned framework** that connects coffee trade to SDGs 1, 2, 8, 10, 12, 13, 15, and 17
4. **Country-specific intelligence** that ambassadors can share with their capitals to justify engagement
5. **A regionally-owned scientific initiative** positioned within the LAC diplomatic community in The Hague — not an externally imposed assessment

6. THE REQUEST: A SHARED COMMITMENT

Dialectik is seeking the engagement of GRULAC ambassadors in three specific forms:

GRULAC Advocacy	Introduce this initiative to the Group of Latin American and Caribbean Ambassadors in The Hague as a regionally-owned scientific proposal. Dialectik will prepare tailored materials for each coffee-producing country ambassador.
EU–Dutch Channels	Facilitate introductions to EU and Dutch institutional funding mechanisms — including EUROCLIMA+, IDB Lab, and the DOEN Foundation — where diplomatic endorsement provides critical credibility.
National Connection	Connect Dialectik with relevant national authorities (ministries of agriculture, environment, and trade) in target case study countries to facilitate country-level engagement and data access.

THE BOTTOM LINE

Coffee is a regional economic asset under structural threat. The failure is both ecological and social. The regulatory environment is transforming the rules of trade. Dialectik offers the only peer-reviewed methodology that measures the connection between social collaboration and environmental outcomes — meaning LAC countries can design adaptation that works, not just hope it does. The time to act is now, before market access narrows and the opportunity to lead is lost.

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