EU trade policy digest April–July 2025

Published by AGRINFO on 31 Aug 2025

Recent developments in EU trade policy

European Commission: Negotiations and agreements

Update

AGRINFO summary of progress in EU trade negotiations with low- and middle-income countries, and other policy developments that may impact on trade in agri-food products.

For detail see EU trade policy digest April–July 2025.

Recent developments

EU negotiations with low- and middle-income countries

India: The European Commission reported slow progress in advancing negotiations, with much work still required in many technical areas. There were constructive discussions on trade and sustainable development, but inconclusive talks on market access for agri-food products. The next round of talks is due in September 2025.

Indonesia: A political agreement has been reached on a Comprehensive Economic Partnership Agreement. This agreement still needs to be formalised, probably in September 2025, with signature and ratification expected in 2026. The EU has agreed that Indonesian palm oil exports to the EU will benefit from a zero duty quota, which has facilitated progress towards a final deal.

Moldova: The EU and Moldova have reached agreement on expanding their trade relations. This will provide greater access for Moldova to the EU market for certain fruits, grape juice, and garlic. Moldova agrees to align its national rules on pesticides with EU rules by the end of 2027. The agreement includes a safeguard clause that allows the EU to reintroduce import tariffs if imports cause social or economic disruption in the EU.

Philippines: Significant advances were made at talks held in June, including the completion of discussions on sustainable food systems, and progress in the areas of sanitary and phytosanitary measures, rules of origin, and trade in goods. Both sides speak optimistically of a speedy conclusion to negotiations, with the next round due in October 2025.

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Thailand: The EU and Thailand report progress at the latest round of Free Trade Agreement (FTA) discussions in June 2025, with preliminary agreement on a wide range of topics including technical barriers to trade, and sustainable development. Some advances are reported on sanitary and phytosanitary measures, but divergences remain. The next round of talks will take place in September 2025.

Türkiye: At the second meeting of the High-Level Dialogue on Trade, the EU and Türkiye discussed the elimination of trade barriers, including trade in organic products and the use of beef quotas. Agreements were reached in relation to updated rules of origin, and the use of electronic A.TR (*Admission Temporaire Roulette*, Temporary Admission) movement certificates to allow for separation of goods in the EU–Türkiye Customs Union.

Ukraine: The EU and Ukraine reached preliminary agreement on new agricultural quotas, with further liberalisation including limited increases in quotas on certain sensitive products including sugar, poultry, eggs, wheat, maize, and honey. Quotas for these products can be lower than the volumes that have been imported into the EU between 2022 and 2024 as a result of temporary full trade liberalisation in response to Russia's aggression against Ukraine.

Trade policy

Generalised Scheme of Preferences (GSPs) review: Four years after the European Commission's initial proposal, the EU institutions are struggling to reach final agreement on the updated GSPs that provide improved market access for many low- and middle-income countries. While most points have now been agreed, the European Parliament is seeking the establishment of a safeguard that can rapidly introduce import tariffs on rice in response to increased imports from Everything But Arms (EBA) countries. Talks will continue in September.

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