

**EU TRADE POLICY
JANUARY–MARCH 2025**

QUARTERLY TRADE DIGEST





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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.

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AGRINFO prepares quarterly briefings on the latest developments in EU trade policy and trade negotiations that concern low- and middle-income countries. These are designed to highlight the topics of current interest, in particular for policymakers and public authorities. Links are given to resources where more detailed information can be found, including the official EU website on trade [Negotiations and agreements](#).

KEY POINTS

EU negotiations with low- and middle-income countries

Eastern and Southern African states: The European Commission reported further progress in talks on a new Economic Partnership Agreement between the European Union (EU) and Eastern and Southern Africa (Comoros, Madagascar, Mauritius, Seychelles, and Zimbabwe), with the conclusion of negotiations on various chapters including trade and sustainable development. The intention is to conclude negotiations at the following (16th) round of negotiations (date not yet specified).

India: The European Commission reported difficulties in advancing negotiations of agricultural goods tariffs and simplification of India's complex rules of origin. Progress has been made in certain areas of negotiation, but there are doubts that talks can be completed without EU concessions (greater flexibility for India) in relation to sustainability -related measures such as the Carbon Border Adjustment Mechanism (CBAM).

Malaysia: The EU and Malaysia have agreed to relaunch negotiations for a Free Trade Agreement.

Philippines: Negotiations on a Free Trade Agreement are reported to be very constructive, with further talks foreseen in Brussels in June 2025.

Thailand: The EU and Thailand are due to meet in April for a fifth round of trade talks, following good progress on a wide range of issues at the previous round of talks, including positive discussions on sanitary and phytosanitary (SPS) rules and sustainable food systems. Thailand would like to conclude talks in 2025.



KEY POINTS

Trade policy

EU prepares response to US tariffs: In March, the EU discussed appropriate retaliation measures to import tariffs introduced by the USA on steel and aluminium products, and other announced tariffs, leading to potential rises in tariffs on US agri-food products. Retaliation was delayed in anticipation of the announcement of further US tariffs on a wide range of products in April.

EU–India cooperation leads to market access improvements for food: The EU and India report respective improvements to market access, with India approving several EU-authorised pesticides; and the EU approving a number of Indian aquaculture establishments, and addressing recognition of the equivalence of Indian organic production.

EU seeks stronger alignment of imported products with EU rules: In the context of the publication of its *Vision for the Future of Agriculture*, the EU will aim for “stronger alignment” of imported products with EU rules, in particular in relation to pesticides and animal welfare. This will include a reconsideration of certain pesticide maximum residue levels (MRLs) and the implications of the EU’s export of pesticides banned in Europe. The EU also intends to strengthen import controls. This approach is supported by European farmers, but is criticised by other stakeholders.

Growing EU debate on food stockpiling: In the light of rising geopolitical tensions, there is a growing debate on ensuring that the EU is prepared for potential crises. This includes discussions on the role played by stockpiling of critical goods, potentially including food. The European Commission plans to put forward a Stockpiling Strategy in 2025.



EU NEGOTIATIONS WITH LOW- AND MIDDLE-INCOME COUNTRIES

Eastern and Southern African States

The 15th round of trade and investment negotiations with five Eastern and Southern African States (ESA5) – Comoros, Madagascar, Mauritius, Seychelles, and Zimbabwe – took place in Brussels in March 2025. These negotiations aim to deepen the Economic Partnership Agreement (EPA) that was established in 2012 and applies since 2019.

The two sides provisionally concluded negotiations in relation to the chapter on Economic and Relevant Cooperation, and Trade and Sustainable Development. They also agreed in principle that Trade and Sustainable Development would be subject to the dispute settlement mechanism. Provisional agreement was also reached on the involvement of civil society in the implementation of the EPA. Discussions progressed but were not concluded in relation to geographical indications and rules of origin. The intention is to conclude negotiations at the following 16th round of negotiations (date still to be confirmed) ([European Commission 2025a](#)).

India

In March the European Commission reported some of the challenges faced by negotiators in completing the EU–India Free Trade Agreement (FTA) following the 10th round of negotiations ([European Parliament 2025](#): video from 16:48). Negotiations on agricultural goods tariffs were reported to be difficult, with the EU not yet securing the tariff reductions it is seeking in relation to wine, spirits, and beers. The EU also wants India to simplify its complex rules of origin determining how much of a product’s content must originate in the EU, but India is resistant to such changes. More progress was made by negotiators in relation to other areas, including intellectual property, services, and dispute settlements ([European Commission 2025b](#)). There were advances in relation to the chapter on Trade and Sustainable Development, but in relation to certain core aspects – sanctions, dispute settlements, the involvement of civil society in monitoring the agreement – India was not able to find agreement with the EU.

India’s negotiating was particularly robust in relation to sustainability-related measures, with requests for exemptions or long transition periods on a range of EU rules, including the Carbon Border Adjustment Mechanism (CBAM), deforestation, and due diligence. Flexibility in relation to CBAM was presented by India as essential to reaching a deal.

Negotiations are set to continue intensely, with the 11th round of talks scheduled for early May in New Delhi.

Malaysia

The EU and Malaysia have formally agreed to relaunch negotiations for a FTA. The talks were launched in 2010, but have been on hold since 2012. Malaysia is the EU’s third-largest trading partner out of the 10 member countries of the Association of Southeast Asian Nations ([ASEAN](#)), with existing trade worth around €45 billion annually. European Commission President von der Leyen has emphasised that the talks are “about more than economic exchanges”, pointing to the need for “robust commitments on labour rights and climate and environmental protection” ([European Commission 2025c](#)).



Philippines

In February 2025, the EU held a second round of negotiations on an FTA with the Philippines in Manila. Discussions covered a wide range of topics, including sustainable food systems, sanitary and phytosanitary (SPS) measures, and market access. Negotiations on sustainable food systems were largely completed, and the overall discussions were reported by the European Commission to be “constructive and forward-looking” ([European Commission 2025d](#)). Philippines negotiators also described the talks as “very constructive” ([San Juan 2025](#)). Further negotiations will continue in virtual meetings ahead of the third round of negotiations in Brussels in June 2025.

Thailand

The EU and Thailand will meet in Brussels in the first week of April for the fifth round of trade talks. This follows on the “constructive discussions” held in November in Bangkok. At those negotiations, the two sides discussed a range of issues including export duties, import restrictions, and import and export monopolies, which are expected to pave the way to a first exchange of market access offers (tariff reductions and quotas) in April 2025. Progress was also made in agreeing rules of origin for several agricultural goods. In relation to SPS rules, there were detailed discussions relating to trade facilitation and the procedures for listing of establishments. There was also “good progress” in reaching agreement on the Trade and Sustainable Development chapter, including on the texts related to trade and gender equality, biological diversity and trade, and responsible business. Further discussions will focus on multilateral environmental agreements and gender conventions. On sustainable food systems, negotiators made “very good progress” in agreeing objectives and general principles. They also had positive discussions in relation to sustainable food systems, fraud in the agri-food chain, animal welfare, and antimicrobial resistance, although further work is needed before texts on these topics can be agreed ([European Commission 2024](#)).

Thailand hopes to finalise an FTA with the EU in 2025, following the signing of an FTA with the European Free Trade Association (EFTA) in January 2025 ([The Nation 2025](#)). However, the talks may be complicated by concerns in the EU food industry, for example Spanish tuna fishing interests that would face increased competition from Thailand, the world’s largest exporter of preserved tuna ([Sanchez Manzanaro 2025a](#)).

See the EU webpage [Negotiations and agreements](#): scroll down to download Overviews and a Map summarising the state of play of EU trade agreements.



TRADE POLICY

EU prepares response to US tariffs

In March, the European Commission prepared its response to tariffs that have been introduced by the USA on certain EU products. While not directly impacting imports from low-and middle-income countries, any retaliation introduced by the EU on US agri-food products could potentially impact demand from these countries that are exported from the USA to the EU.

What tariffs has the US imposed on the EU so far?

On 12 March, the USA introduced tariffs on steel and aluminium products imported from the EU. The introduction in April of a 25% duty on European cars was announced in March, with further tariffs on other products anticipated.

How is the EU responding?

In March the EU discussed a list of US products on which it could potentially introduced tariffs. The EU initially announced that it would counter US tariffs by reintroducing retaliatory tariffs that it had previously imposed during President Donald Trump's first administrative term (Regulation [2018/886](#)). The agri-food products included in this list are sweetcorn, dried beans, maize, bulgur wheat, cereal products, peanut butter, fruit and nut juices, and whiskey. As US tariffs go further than envisaged by the US in that first term (covering "derivative products" such as machinery parts and higher tariffs on aluminium), The European Commission has discussed extending that list to include poultry, beef, certain seafood, nuts, eggs, dairy, sugar, coffee, peppers, spices, beer, wine and spirits, fruits, and vegetables.

The Commission originally intended to apply these retaliatory tariffs from 1 April, but delayed its response due to the US announcement of further tariffs. The EU food sector and politicians have urged for a cautious and pragmatic response. In particular, there are concerns among EU producers of wines and spirits that the USA would target these products in response to retaliatory action by the EU ([Sanchez Manzanaro 2025b](#)). President Trump has threatened the introduction of 200% tariffs on all EU wines, champagnes, and alcoholic products ([Sanchez Manzanaro 2025c](#)).

EU–India cooperation leads to market access improvements for food

The EU–India Trade and Technology Council met for the second time in February 2025. This bilateral platform aims to advance trade and promote global stability, and has established working groups in three areas:

- strategic technologies, digital governance, and digital connectivity
- clean and green technologies
- trade, investment, and resilient value chains.

The third of these working groups includes agri-food trade, and works to encourage common efforts to share research and innovations relating to climate-resilient practices, crop diversification, and infrastructure improvements. At the February meeting, both sides welcomed recent efforts to improve market access for food. This included India's approval of several EU pesticides, and the EU's listing of a number of Indian aquaculture establishments for export to the EU. The EU also addressed the issue of equivalence for agricultural organic production (see [Amendments to organic control bodies – equivalence regime](#)) ([European Commission 2025e](#)).



EU seeks stronger alignment of imported products with EU rules

In February, the [European Commission \(2025f\)](#) published *A Vision for Agriculture and Food*, setting out a roadmap for EU activities in relation to agriculture for 2025–2029. This includes the goal of pursuing “a stronger alignment of production standards applied to imported products, notably on pesticides and animal welfare”. This is a response to concerns that the EU food sector is at a disadvantage compared to food imports, due to more stringent EU rules. One idea under discussion is for stricter rules regarding pesticides that are banned in the EU, in order to ensure that such pesticides do not indirectly come back into the EU through imported products. This includes reconsideration of certain maximum residue levels (MRLs), and the implications of exporting pesticides banned in the EU. The Commission will launch an impact assessment on this topic in 2025, and will then “consider the impacts on the EU’s competitive position and the international implications”.

While there is considerable support among European farmers for this new approach ([Copa Cogeca 2025](#)), there are concerns that demanding exactly the same requirements of imports (sometimes referred to as “mirror clauses”) could unfairly penalise producers in countries with different agricultural and climate conditions ([Clarke 2025](#)). However, the Commission has stated that any changes to EU Regulations will be in line with international rules. *A Vision for Agriculture and Food* also states that if a pesticide considered for a ban is central to protecting the crop concerned, it will review whether alternatives are already available, unless the pesticide in question represents a threat to human health or the environment.

The Commission has also announced more stringent enforcement of import controls, although some in the European food industry consider this to be unnecessary. The dairy industry, for example, argues that the “import regime is among the strictest in the world, making a further strengthening of import controls appear excessive”. They fear that “imposing all our standards of others would undermine the goal of deepening bilateral trade relationships with partner countries” ([Cheese Reporter 2025](#)).

For further information see [EU Vision for Agriculture and Food 2025–2029](#).

Growing EU debate on food stockpiling

In light of growing concerns about insecurity in the face of rising geopolitical tensions, the EU is reviewing its state of readiness to respond to global events. Following up on the *Safer Together* report ([Niinistö 2024](#)), a Joint Communication on the European Preparedness Union Strategy has been issued ([European Commission 2025g](#)). This strategy sets out a series of actions aimed at improving the EU’s anticipation of and response to emerging crises. This includes better preparation of the population, improved cooperation (both public–private and civil–military), and building crisis-response mechanisms. One initiative is the development of a stockpiling strategy which will look to establish EU-level reserves of critical resources. This covers for example, critical raw materials, energy equipment, and “potentially agri-food products and water”. Although agri-food products are not currently at the forefront of the strategy, their inclusion reflects growing political attention to food security and the need to create strategic reserves ([Bergoënd and Sanchez 2025](#)). The Niinistö Report underlined the lack of an EU list of the vital functions that governments must be able to provide, including food. It recommended the EU and Member States should systematically develop stockpiles and reserves, including foodstuffs, a precautionary measure that already exists, for example, in Finland and Switzerland. The Commission is expected to produce a proposal for an EU stockpiling strategy in 2025 ([European Commission 2025h](#)).



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