EU TRADE POLICY
APRIL–JUNE 2026

TRADE DIGEST 2026/3

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AGRINFO prepares regular briefings on the latest developments in European Union (EU) trade negotiations and trade policy that concern low- and middle-income countries, and on other developments in the policy-making arena that may have an impact on trade of agri-food products. These briefings 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.

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KEY POINTS

EU trade negotiations with low- and middle-income countries

Armenia: On 2 July the European Union (EU) announced a proposal for autonomous trade measures that liberalises almost 80% of Armenian exports to the EU, making these products tariff-free. The measure aims to support Armenia's trade diversification amid economic pressure from Russia.

The Caribbean: The Fifth Meeting of the Joint CARIFORUM–EU Council, held on 19 June 2026, reviewed progress in the implementation of the CARIFORUM–EU Economic Partnership Agreement (EPA).

Eastern and Southern Africa: On 10 June 2026 the EU and four Eastern and Southern African (ESA4) States concluded negotiations on a modern and comprehensive free trade agreement that will deepen their existing interim EPA. The Agreement introduces new commitments in services, investment, digital trade, intellectual property, public procurement, and competition policy.

India: Negotiations on the EU and India Free Trade Agreement concluded on 27 January 2026. The Agreement is currently under legal review and is expected to be signed by 31 December 2026.

Indonesia: On 29 June 2026 the European Commission presented to the European Council its proposed Comprehensive Economic Partnership Agreement and Investment Protection Agreement (IPA) with Indonesia. The Agreements aim to deepen EU and Indonesia trade relations by eliminating import duties on 98.5% of tariff lines and simplifying export procedures.

Malaysia: During the fourth round of negotiations, held in Kuala Lumpur in June, three additional chapters were concluded: Customs and Trade Facilitation, Trade Remedies, and Good Regulatory Practices. The next round of negotiations is scheduled for September 2026.

Mercosur: Provisional application of the EU–Mercosur Interim Agreement on Trade began on 1 May 2026. Mercosur countries remain divided over how to allocate preferential export quotas.

Mexico: The EU and Mexico signed the Modernised Global Agreement (MGA) and interim Trade Agreement (iTA) on 22 May 2026 during the eighth EU–Mexico Summit in Mexico City.

Philippines: The sixth round of negotiations on the EU–Philippines Free Trade Agreement was held in Manila in May 2026. Negotiations were concluded on the chapters covering digital trade and intellectual property.

Thailand: The ninth round of negotiations on an EU–Thailand Free Trade Agreement (FTA) took place in June 2026 in Brussels. Both parties agree to pursue a balanced approach that protects public interest while maximising economic benefit.

KEY POINTS

Trade policy

Revised Generalised Scheme of Tariff Preferences (GSPs): The revised Generalised Scheme of Preferences (GSP) Regulation was signed on 18 June 2026, and will apply from 1 January 2027 for a period of 10 years. The new Regulation places greater emphasis on compliance with international standards on human rights, labour rights, environmental protection, climate action, and good governance.

Inward processing arrangements for raw sugar: On 30 April 2026 the EU suspended its use of the inward processing customs procedure for imports of raw cane sugar intended for refining into white sugar. Inward processing is a special customs procedure that allows non-EU goods, including raw cane sugar, to be imported into the EU for processing without the immediate payment of import duties.

EU Deforestation Regulation: On 4 May 2026 the European Commission published a report on the simplification of the revised EU Deforestation Regulation (EUDR).

EU agri-food trade surplus rises in first 4 months of 2026: In April 2026, EU trade in agri-food products remained broadly stable, with exports valued at €20.3 billion and imports at €16.5 billion.

EU TRADE NEGOTIATIONS WITH LOW- AND MIDDLE-INCOME COUNTRIES

Armenia

On 2 July 2026, European Commission President Ursula von der Leyen announced a proposal for autonomous trade measures that would liberalise almost 80% of Armenian exports to the EU, making these products tariff-free (Politico 2026). The measure aims to support Armenia's trade diversification amid economic pressure from Russia, which introduced restrictions on Armenian agricultural products, beverages, and other exports in May and June 2026 (European Commission 2026a).

The EU proposal suspends *ad valorem* duties under the Generalised Scheme of Preferences, although it excludes certain sensitive products. It also creates tariff-free quotas for eight agricultural products: cucumbers and gherkins, grapes, pears, apricots, cherries, peaches, plums, and strawberries. Given the urgency of Armenia's situation, the Commission has not carried out an impact assessment on the proposed duty cuts. However, it can reinstate duties if imports create serious difficulties for EU producers. The European Parliament and EU Member States must still approve the proposal before it can take effect (European Commission 2026b).

Politico (2026) EU extends Ukraine-style trade relief to Armenia.

European Commission (2026a) EU and Armenia strengthen their partnership, boosting resilience, trade and connectivity. News article, 2 July.

European Commission (2026b) Proposal for a Regulation of the European Parliament and of the Council on temporary trade-liberalisation measures applicable to Armenian products.

The Caribbean

The Fifth Meeting of the Joint CARIFORUM–EU Council, held in Santo Domingo on 19 June 2026, reviewed progress in implementing the EU–CARIFORUM Economic Partnership Agreement (Council of the European Union 2026). Under this Agreement, the EU imports various agricultural products from the CARIFORUM region, such as bananas, tropical fruit, sugar, rum, spices, cocoa beans, and rice. All CARIFORUM agricultural goods benefit from duty-free quota-free access to the EU market. The agreement is accompanied by declarations concerning agricultural products, including a joint declaration on bananas, acknowledging the importance of the sector for several CARIFORUM countries and setting out measures to support the industry against potential challenges (European Commission 2026c).

Concerns were raised by CARIFORUM States over visa requirements in some EU Member States that continue to limit market access for Caribbean service suppliers (The Brussels Times 2026).

Council of the European Union (2026) CARIFORUM-EU Economic Partnership Agreement: Fifth Meeting of the Joint CARIFORUM-EU Council 19 June 2026 – Joint Communiqué.

European Commission (2026c) African, Caribbean and Pacific countries.

The Brussels Times (2026) Caribbean–EU Trade Pact faces strains as hurricane recovery adds pressure. Newsroom, 22 June.

Eastern and Southern Africa

On 10 June 2026 in Mauritius, the EU and four Eastern and Southern African (ESA4) States – Comoros, Madagascar, Mauritius, and Seychelles – concluded negotiations on a modern and comprehensive free trade agreement that will deepen their existing EPA. The deal marks the first such agreement between the EU and countries in the Eastern and Southern Africa region. Under the Interim Agreement, the EU has fully liberalised its imports from ESA countries, while ESA countries have liberalised 80–98% of imports from the EU. Sensitive products, including agricultural products, livestock, fisheries products, processed foods, textiles, clothing, and footwear, remain permanently protected (European Commission 2026d).

The comprehensive agreement introduces new commitments in services, investment, digital trade, intellectual property, public procurement, and competition policy (MCCI 2026). EU and ESA4 firms will have near-complete access to each other's public procurement markets, and overseas investors will be treated in the same way as domestic investors (EU Observer 2026). The Agreement does not change basic requirements for food products, but does establish a Sanitary and Phytosanitary (SPS) Committee which can discuss regulatory trade issues that arise. It also aims to improve the management of SPS emergencies that may arise in relation to food and fish imports and exports, including cooperation regarding official controls, certification, and border checks. The EU also commits to capacity-building measures that will support farming and rural employment, for example by adding value to local production chains and improving farmers' ability to meet EU standards. For the fisheries and aquaculture sectors, the focus is on enhancing cooperation in relation to sustainable fishing, including binding provisions protecting marine biological resources and combating illegal, unreported, and unregulated (IUU) fishing (European Commission 2026e).

The negotiated draft text of the Agreement is not yet public. It must undergo EU and ESA internal procedures before signature and ratification. In the meantime, the parties may decide to provisionally apply it. The comprehensive agreement remains open to accession by other ESA States, with negotiations currently ongoing with Zimbabwe (EEAS 2026).

EEAS (2026) EU concludes modernised Economic Partnership Agreement with Sub-Saharan Africa partners. European External Action Service.

EU Observer (2026) European firms gain access to African tax havens as EU seals first-ever offshore trade pact.

European Commission (2026d) EPA – Eastern and Southern Africa.

European Commission (2026e). Memo: EU–ESA Enhanced Economic Partnership Agreement (EPA) – Chapter-by-Chapter Summary.

MCCI (2026) Deepened EU–ESA Economic Partnership Agreement: MCCI Hosts High-Level Reception to Mark the Signing of the Agreement. Mauritius Chamber of Commerce and Industry.

India

The EU and India Free Trade Agreement negotiations concluded on 27 January 2026 (European Commission 2026f, 2026g). Some of the negotiated texts have been published by the European Commission (2026h), however the detailed market access commitments, including tariff schedules, have not yet been made public (Hindustan Times 2026). The Agreement is currently undergoing legal scrubbing and is expected to be signed by 31 December 2026 (The Economic Times 2026).

European Commission (2026f) EU and India conclude landmark Free Trade Agreement. Press Release, 27 January.

European Commission (2026g) Memo: EU–India Free Trade Agreement – Chapter-by-Chapter Summary.

European Commission (2026h) EU-India: Text of the agreements.

Hindustan Times (2026) India and EU Set to Start Talks Amid Efforts to Ink FTA by Year-End. India News, 24 March.

The Economic Times (2026) India–EU FTA Legal Scrub to End in 10–12 Days, Deal by Dec. 31: Piyush Goyal. Business News, 3 July.

Indonesia

On 29 June 2026, the European Commission presented to the European Council its proposals on the Comprehensive Economic Partnership Agreement (CEPA) and the Investment Protection Agreement (IPA) with Indonesia. The agreements aim to deepen EU and Indonesia trade relations by eliminating import duties on 98.5% of tariff lines and simplifying export procedures, including agri-food products. Together, these agreements will help the EU and Indonesia deepen their partnership by removing import duties on 98.5% of tariff lines and simplifying export procedures for EU goods to Indonesia, including agri-food exports. In terms of the process, both the European Parliament and the Council (EU Member States) must give their consent for the Agreement (European Commission 2026i). In parallel, Indonesia is advancing in the domestic ratification process, which is expected to be completed in the second half of 2026, enabling implementation of the Indonesia–EU CEPA in early 2027 (Antara News 2026).

Negotiations between the two sides were completed on CEPA in September 2025. The full text, including the schedules outlining the EU's reduction in tariffs (import duties), is now published (European Commission 2026j).

Antara News (2026) Indonesia–European Union CEPA Enters Key Approval Phase: Minister. Business & Investment, 3 July.

European Commission (2026i) Commission presents Council with ambitious Indonesia agreements. News Article, 29 June.

European Commission (2026j) Tariff schedule of the Union. General Notes.

Malaysia

Malaysia and the EU have completed negotiations on five chapters of the Malaysia–European Union Free Trade Agreement (MEUFTA), with both sides aiming to finalise the deal by 2027 to coincide with the 50th anniversary of relations between the EU and the Association of Southeast Asian Nations (ASEAN). During the fourth round of negotiations, held in Kuala Lumpur from 8 to 12 June 2026, three additional chapters – Customs and Trade Facilitation, Trade Remedies, and Good Regulatory Practices – were concluded following earlier agreement on chapters covering Transparency and SMEs. The next round of negotiations is scheduled for 21–25 September 2026 in Brussels, Belgium (New Straits Times 2026).

Negotiations, which began in 2010 and were relaunched in January 2025, are continuing, with outstanding issues including market access offers for goods, services, investment, and government procurement. Key areas of contention remain palm oil and halal meat (Borderlex 2026).

Borderlex (2026) EU and Malaysia Aim to Seal Trade Deal by October 2027. News, 16 April.

New Straits Times (2026) Malaysia, EU Finalise Five Chapters of Free Trade Agreement Targeted for 2027. Business Times, 29 June.

Mercosur

Provisional application of the EU–Mercosur Interim Agreement on Trade (iTA) began on 1 May 2026. For Mercosur, benefits are concentrated in agriculture and light industry. The EU will reduce or eliminate tariffs on many agricultural exports. For certain products the elimination of import tariffs will be immediate, but for many products importers will be reduced gradually over a period ranging from 4 to 15 years. A full list of tariff reductions can be found in Annex 2-A of the iTA. The Agreement is also expected to significantly benefit other sectors, including footwear and textiles (Santander 2025). For certain products that are more sensitive to the EU agricultural sector, the iTA establishes tariff rate quotas, including for beef and poultry products, cereals, sugar, dairy products, eggs, honey, sweetcorn, and garlic (European Commission 2026k). In April 2026, the Commission published new rules to allow these tariff rate quotas to be implemented (see EU–Mercosur Interim Trade Agreement: management of tariff rate quotas). The agreement is also expected to increase EU agri-food exports to the Mercosur region by 50% (European Commission 2026l).

However, Mercosur countries remain divided over how to allocate preferential export quotas. Argentina, Brazil, Paraguay, and Uruguay are entitled to export agreed quantities of agri-food products to the EU at reduced or zero tariffs, but have yet to reach agreement on quota sharing, and are currently applying a first-come, first-served approach. Early implementation has raised concerns, with Uruguay using more than 60% of its rice quota within 1 month, and Argentina accounting for 80% of the available honey quota during the first 3 months (Euractiv 2026). The EU–Mercosur Partnership Agreement (EMPA) was signed on 17 January 2026 (European Commission 2026m).

Euractiv (2026) EU trade deal sparks quota tug-of-war inside Mercosur bloc. Agrifood, 1 July.

European Commission (2026k) Factsheet: Provisional application of the EU–Mercosur agreement – How to export agricultural goods.

European Commission (2026l) EU–Mercosur interim trade agreement starts to provisionally apply.

European Commission (2026m) EU and Mercosur sign historic and ambitious partnership. Press release, 17 January.

Santander (2025) The EU–Mercosur agreement: A strategic alliance for the 21st century. Press room, 1 November.

Mexico

The EU and Mexico signed the Modernised Global Agreement (MGA) and interim Trade Agreement (iTA) on 22 May 2026 during the 8th EU–Mexico Summit in Mexico City. Building on a long-standing trade relationship valued at €100 billion annually in goods and services, the modernised agreement will remove high Mexican tariffs on key EU agri-food exports, protect 568 EU geographical indications from imitation, and strengthen cooperation on critical raw materials, among other areas (European Commission 2026n).

Following the signature of the MGA and iTA, the EU and Mexico will proceed with their respective ratification procedures. While the broader MGA needs to be ratified by all EU Member States, liberalised trade between the EU and Mexico can begin once the iTA receives support from the Council of the EU (Member States). The European Parliament has already given its support for the new partnership (European Parliament 2026). The iTA enters into force 2 months after both sides have completed their internal procedures.

European Commission (2026n) Factsheet: EU–Mexico Modernised Global Agreement – An agreement for European Farmers.

European Parliament (2026) Parliament backs modernised EU-Mexico partnership and easier trade. Press release, 8 July.

Philippines

The Sixth round of negotiations on the EU–Philippines Free Trade Agreement was held in Manila from 18 to 22 May 2026. Discussions were described as constructive and engaging (European Commission 2026o). The discussions covered key areas, including trade in goods, rules of origin, trade in services, investment, government procurement, and raw materials (see EU proposals). Negotiations were substantially concluded on the chapters covering digital trade, intellectual property, and final provisions. Once concluded and implemented, the Agreement will replace the Generalised Scheme of Preferences Plus (GSP+), under which the Philippines currently benefits. The country's GSP+ eligibility is due to expire in 2027. Philippine negotiators have indicated their ambition to conclude negotiations in July 2026 (Manila Bulletin 2026).

From the private sector perspective, President of the Philippine Chamber of Commerce and Industry (PCCI) Ferdinand Ferrer has warned that in spite of the global benefits for business, there may be limited opportunities for smaller companies for greater EU market access due to the EU's stringent product quality standards (Manila Bulletin 2026).

European Commission (2026o) EU–Philippines Agreement: Documents [and report of Sixth round].

Manila Bulletin (2026) Manila targets June conclusion for EU free trade deal. Trade & Industry, 25 May.

Thailand

The Ninth round of negotiations on an EU–Thailand Free Trade Agreement (FTA) took place from 22 to 26 June 2026 in Brussels (European Commission 2026p). While recognising differing levels of readiness and sensitivities, both parties agreed to pursue a balanced approach that protects the public interest while maximising economic benefit (The Nation 2026). Text-based negotiations continued across all outstanding chapters, with SPS measures remaining a challenging area. Constructive discussions were held on market access, including tariff liberalisation, services, and investment, based on initial offers exchanged in previous rounds. The tenth negotiating round is scheduled for the week of 28 September 2026 in Thailand (European Commission 2026p).

European Commission (2026p) EU–Thailand Agreement: Documents [and report of round 9].

The Nation (2026) Thailand pushes EU FTA talks towards key 9th-round breakthrough. Business, 26 June.

*More information is available on 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

Revised generalised scheme of tariff preferences

The revised generalised scheme of tariff preferences (GSP) Regulation was signed on 18 June 2026 and published in the *Official Journal of the European Union* on 22 June 2026. It will apply from 1 January 2027 for a period of 10 years. The new GSP will continue to provide reduced or zero tariffs to imports from 65 developing countries[1] (GSP Hub 2026). The new Regulation retains the three existing pillars – Standard GSP, GSP+, and the Everything But Arms (EBA) initiative – but places greater emphasis on compliance with international standards on human rights, labour rights, environmental protection, climate action, and good governance (European Commission 2026q). For instance, to benefit from GSP+ tariff preferences, countries must give a binding undertaking to maintain ratification of all relevant conventions (listed in Regulation 2026/1395, Annex VI) and to ensure their effective implementation. Standard GSP and EBA countries are not required to ratify and implement the relevant conventions, but are expected to respect their principles.

[1] Belarus has fully been withdrawn from the Standard GSP, while Cambodia is partially withdrawn from EBA.

Preferential tariffs can be temporarily withdrawn if these principles are seriously and systematically violated (European Commission 2026q).

For the first time, the EU is linking preferential trade access to the performance of partner countries in readmitting their own nationals where they are found to have entered the EU illegally (Regulation 2026/1395, Art. 22). This may present challenges for some GSP beneficiary countries, particularly those with limited administrative capacity to manage effective identification, documentation, and return processes. The new GSP scheme also introduces a specific automatic safeguard mechanism (Art. 34) that will remove preferential tariffs for rice originating in EBA beneficiary countries where there is a surge of imports above historical levels. This provision could create uncertainty for major EBA rice exporters, particularly Cambodia and Myanmar, as potential safeguard measures may affect their continued preferential access to the EU market. The revised scheme also eases the criteria on "economic vulnerability" that countries need to fulfil to attain GSP+ status. On rules of origin, the new rules introduce greater flexibility for all GSP beneficiaries (Standard GSP, GSP+, and EBA) by allowing both regional and extended cumulation. For further information, see New generalised scheme of tariff preferences (GSP).

European Commission (2026q) Questions & Answers on the new EU Generalised Scheme of Preferences.
GSP Hub (2026) A new GSP framework.

Inward processing arrangements for raw sugar

On 30 April 2026, the EU suspended its use of the inward processing customs procedure for imports of raw cane sugar intended for refining into white sugar. Inward processing is a special customs procedure that allows non-EU goods, including raw cane sugar, to be imported into the EU for processing without the immediate payment of import duties. The suspension applies to raw cane sugar classified under CN codes 1701 13 90 and 1701 14 90, used to produce white sugar under CN code 1701 99 10. The measure is intended to address disturbances in the EU sugar market caused by increasing imports of raw cane sugar under inward processing arrangements (European Commission 2026r). For further information, see Inward processing arrangements for raw cane sugar.

European Commission (2026r) Commission acts to support EU sugar producers amid market pressures. News Article, 30 April.

EU Deforestation Regulation

On 4 May 2026, the European Commission published a report on the simplification of the revised EU Deforestation Regulation (EUDR) and a set of further measures for smooth and effective implementation. These measures will provide additional clarity for economic operators, Member States, non-EU countries, and other stakeholders, while guaranteeing legal stability and predictability. The measures include a Report to the European Parliament and Council, an updated Guidance Document and Frequently Asked Questions (European Commission 2026s, 2026t), and a Draft Delegated Regulation on the product scope of the EUDR. In addition, the European Commission is presenting an updated implementing act on the Information System to Member States (European Commission 2026u). For further information, see EU Deforestation Regulation (EUDR): Clarifications May 2026.

European Commission (2026s) Guidance Document for the Regulation on Deforestation-Free Products

European Commission (2026t) FAQ on EUDR Implementation

European Commission (2026u) Commission publishes simplification review of EU Deforestation Regulation. Press release, 4 May.

Draft Commission Delegated Regulation amending Regulation (EU) 2023/1115 as regards the list of relevant commodities and relevant products

Report from the Commission to the European Parliament and the Council: Simplification review on the Regulation (EU) 2023/1115 on the making available on the Union market and the export from the Union of certain commodities and products associated with deforestation and forest degradation (EUDR)

EU agri-food trade surplus rises in first 4 months of 2026

In April 2026, EU trade in agri-food products remained broadly stable, with imports valued at €16.5 billion while exports were valued at €20.3 billion. Cumulative imports since January were €62.0 billion, 7% below the year before, mostly due to reduced imports of cocoa products and cereals, as well as oilseeds and protein crops.

Cocoa prices started to fall at the end of 2025. As a result, imports from most cocoa-producing countries decreased in January–April 2026, for example: Côte d'Ivoire (–€589 million, –17%), Nigeria (–€344 million, –41%), Cameroon (–€315 million, –38%), and Guinea (–€186 million, –96%). By contrast, imports from Viet Nam increased year-on-year by €278 million (+16%), mainly due to larger imported volumes of coffee (+53%), and despite lower prices (–20%).

Imports of cereals showed a decrease of €834 million (–24%), mostly due to lower import volumes of wheat (–€466 million, –47%), but also of maize (–13%), and rice (–21%). Imports of oilseeds and protein crops decreased by €371 million (–6%), mostly due to a reduction in prices (–7%). The reduction is primarily in soyabeans and soya cake, as well as on protein crops. By contrast, imports of sunflower seeds doubled.

Imports grew most in the fruit and nuts category (+€591 million, +6%), with increases spread across different products, particularly avocados and hazelnuts. Imports of beef and veal also increased by €246 million (+25%), mainly due to higher imports from Brazil (+€113 million) and the UK (+€45 million), supported by the current short supply and high prices of EU beef and veal. Imports of margarine and other oils and fats grew by €174 million (+12%) due to increases in different types of oil, particularly coconut oil (European Commission 2026v).

European Commission (2026v) Monitoring EU Agri-Food Trade – Developments until April 2026.

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