17 November 2026

JOINT PRESS RELEASE

EU-Thailand FTA: a balanced agreement must safeguard Europe's sensitive agri-food sectors

As negotiations on the EU-Thailand Free Trade Agreement enter their final stages, European organisations representing farmers, cooperatives, fishers and manufacturers in the rice, poultry, sugar, tuna, starch, and ethanol sectors, call on the European Commission to ensure that the specific vulnerabilities of these sectors are fully accounted for in the final agreement. The cumulative impact of previous trade agreements and the need to ensure fair competition must be taken into account when considering further market access, so as not to undermine European production and processing capacity.

Trade agreements can create opportunities, but these must not come at the expense of Europe's farmers, fishers and primary food processors. The European rice, poultry, sugar, tuna and starch sectors each face specific challenges, and further market access for Thai products risks aggravating existing difficulties, increasing competitive pressure and causing lasting damage to European production and processing capacity.

For **poultry**, Thailand already benefits to a large access to the EU market with 153,800 tonnes of TRQ access under preferential duties and should not receive additional quantities. In addition, fundamental concerns remain about the reliability of Thailand's official controls and export certification system. The European Commission's 2026 audit identified significant shortcomings concerning traceability, the separation of EU-eligible and non-eligible products, HACCP verification and official controls. These findings raise serious questions about the guarantees supporting Thai poultry exports to the EU. Additional market access cannot be considered independently of the need to ensure that existing import requirements are effectively respected and enforced.

The implications of further liberalisation are concerning for the European **rice** sector, which is already exposed to significant import competition and increasing pressure on domestic production. Further preferential access for Thai rice could aggravate existing market difficulties

and undermine the position of European growers in their own market. In addition, differences in labour costs, environmental requirements, pesticide use and production standards create important competitive asymmetries. These concerns are further reinforced by the preferential access granted to countries benefitting from the Everything But Arms (EBA) initiative (under the EU GSP regulation) allowing substantial volumes of rice to enter the EU duty-free (EUR 0), to the detriment of European producers. Similarly, broken rice, rice flour and prepared rice products (e.g. rice sold in pouches, cups and other ready-to-use formats) should also benefit from sensitive-product treatment, given their direct links to and importance within the EU rice value chain.

The European **starch** sector also faces a significant competitive risk. Most starch products have been already subject to substantial concessions in most EU trade agreements concluded since 2020. Thailand is particularly concerning as the world's largest exporter of native tapioca starch and is expanding its production of modified starches and other starch derivatives. It therefore has considerable capacity to flood the EU market should these products be granted preferential access. This risk is amplified by the Thai starch industry's structurally lower production costs, particularly for energy, carbon, labour and regulatory compliance. Clear and strictly enforced rules of origin are also essential to ensure that Thai starch exports genuinely originate in Thailand and are not simply routed through the country from elsewhere in the region

The European beet **sugar** sector is already under severe pressure due to declining consumption and ever-growing preferential access for third-country sugar. While European factories continue to close (22 have been lost since 2017), the Thai sugar industry is expanding, cementing its position of the world's second largest sugar exporter. Further concessions would put additional downward pressure on EU sugar prices and expose European sugar manufacturers and beet growers to unfavourable competition from producers operating under different environmental and labour requirements.

The European **ethanol** sector equally faces strong import pressure resulting from damaging cumulative import effect while already facing high energy costs and strict sustainability rules and at the same time, struggling against surging low-cost imports from major exporters like the United States, Mercosur or Pakistan. Adding new concessions for Thailand would compound existing tariff-rate quotas from other trade deals and regimes, flooding the single market, eroding profit margins of EU producers, and threatening EU strategic autonomy in renewable fuels, green chemicals and domestic protein feed co-products.

The European **tuna** sector is concerned about the prospect of further imports from an already major global processing and exporting country. Thailand currently supplies significant quantities of tuna products to the EU, while the removal of existing customs duties could provide a further incentive for exports. There are also concerns regarding the sustainability and traceability of raw materials sourced from third-country fishing fleets, as well as the

implementation of international labour standards. Further concessions risk intensifying competitive pressure on European fishing and processing industries.

The concerns outlined above demonstrate that the agricultural, fisheries and food products concerned must be recognised as highly sensitive in the EU-Thailand negotiations. This recognition should be reflected in the way these products are treated under the agreement.

The undersigned associations therefore consider it essential that the agreement provides for:

1. **Appropriate treatment of sensitive products**, taking into account the specific circumstances of each sector, including, where necessary, their exclusion from tariff liberalisation.
2. **Effective enforcement of EU import requirements**, ensuring that imported products comply with applicable EU food safety, environmental and labour standards.
3. **Strong rules of origin**, ensuring that preferential tariff treatment is limited to products genuinely originating in Thailand.
4. **Effective and operational safeguards** that can be activated proactively to prevent market disruption, rather than only responding once damage to EU farmers, fishers and food processors has already occurred.

The EU's commitment to open trade must be matched by a commitment to the future of its own agricultural, food and fisheries sectors. An agreement that delivers further market access without adequately addressing the concerns of European farmers, fishers and manufacturers would risk undermining confidence in the EU's trade policy. The final outcome should show that trade liberalisation can be pursued while maintaining the production, jobs and economic activity that sustain rural and coastal communities and contribute to Europe's food security.

On behalf of the following associations:

AVEC – Association of Poultry Processors and Poultry Trade in the EU countries

CEFS – European Association of Sugar Manufacturers

CIBE – International Confederation of European Beet Growers

COPA-COGECA - The united voice of farmers and their cooperatives in the European Union

ePURE – European renewable ethanol association

Europêche - the representative body for fishermen in the European Union

FERM – Federation of European Rice Millers

Starch Europe - The European Starch Industry Association