

Delivering Shared Prosperity and Resilience: The Seafood Case for an EU–Thailand FTA

A White Paper by the Thai Tuna Industry Association (TTIA)

Executive Summary

An EU–Thailand Free Trade Agreement (FTA) represents a unique opportunity to deepen economic ties with a trusted partner while strengthening sustainability, resilience, and shared prosperity. Building on the EU’s established trade policy practice, the agreement would combine market access with robust safeguards on traceability, labor standards, and environmental sustainability.

For Thailand, the FTA would accelerate the modernization of its seafood industry, attract investment in innovation and digital traceability, and create higher-quality jobs across the value chain. The sector already operates within the EU’s strict regulatory framework: Processors undergo regular audits, maintain internationally recognized certifications, and apply vessel-to-can traceability to ensure transparency and compliance.

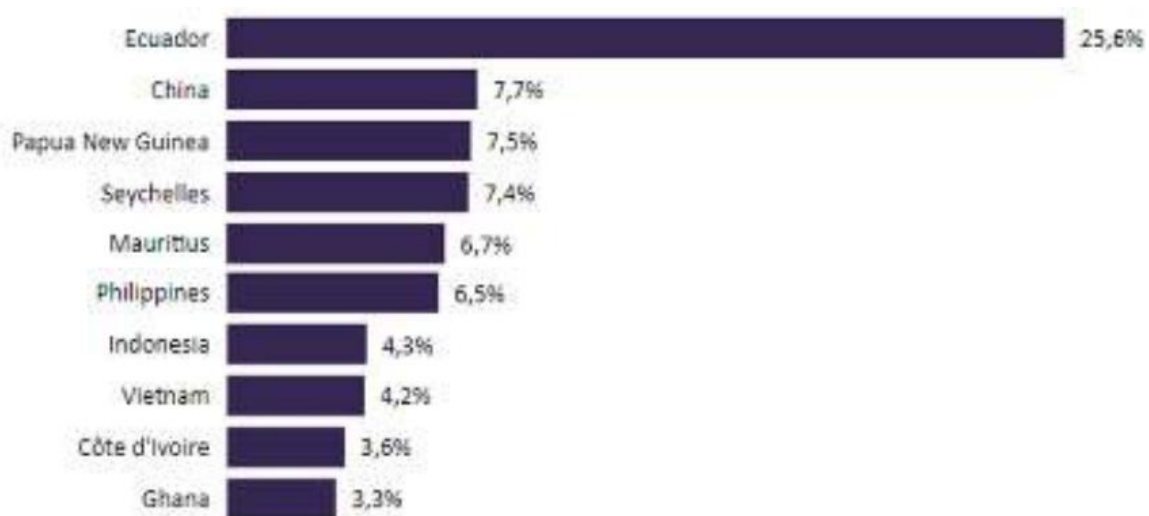
For the EU, the FTA would secure reliable access to responsibly sourced tuna products in a sector where processors are structurally dependent on imported raw material. By diversifying its sources of supply, the EU strengthens competitiveness in European processing, safeguards value-added jobs and delivers greater choice and better value for consumers. In parallel, Thailand’s growing middle class offers opportunities for European seafood products entering the Thai consumer market.

At a time of heightened geopolitical volatility, as the EU seeks to de-risk supply chains and expand trade with dependable partners, an agreement with Thailand aligns directly with European priorities. It would reinforce open strategic autonomy in a critical food sector and set a benchmark for sustainable, rule-based fisheries trade.

An EU–Thailand FTA is therefore more than a trade agreement. It is a chance to build a resilient, future-oriented partnership that delivers value and progress for both Thailand and Europe.

1. Consistency and Reciprocity in EU Trade Policy

The EU has consistently included liberalization of seafood products in its trade agreements with major partners. The Andean Multiparty Agreement (Colombia, Peru, Ecuador), the EU–Caribbean Forum (CARIFORUM) Economic Partnership Agreement (EPA), the EU–Pacific interim EPA (Papua New Guinea, Fiji, Solomon Islands), the EU–Central America Agreement and the EU–Korea FTA all provide for full liberalization of canned tuna and related products, either immediately or through phased tariff reductions.



External sourcing countries for tuna in 2023 in percentage (>3% of total import (1,057 thousand tons)). Source: Eurostat/Comext in AIPCE EU Seafood Supply Synopsis 2024, p. 38

Extending this approach to Thailand would reinforce the EU's reputation as a consistent and fair trading partner – one that applies the same standards and opportunities to all compliant suppliers. Reciprocity builds credibility and predictability in the EU's external trade policy. Liberalization of tuna products in the EU–Thailand FTA would ensure equal treatment, foster fair competition, and create opportunities for both sides.

Thailand's tuna exports already fully align with EU requirements. Processing facilities operate under strict sanitary, quality and traceability frameworks, undergo regular EU audits and maintain internationally recognized certifications. Much of the raw material processed in Thailand originates from the same fleets that supply countries already benefiting from EU FTAs. Thai facilities apply equally high – and often stricter – standards of monitoring and compliance. This reliability directly benefits European consumers by ensuring consistent access to traceable, responsibly sourced seafood.

2. Trusted Quality and Traceability

Thai tuna products meet all EU food safety, quality, and traceability requirements. Only establishments authorized by the European Commission can export to the EU, and every consignment is subject to strict official controls.

Beyond compliance, Thai processors have voluntarily gone further. End-to-end vessel-to-can traceability is now a cornerstone of industry sustainability programs. Following the EU's 2016 Illegal, Unreported and Unregulated (IUU) "yellow card," Thailand implemented one of the world's most robust fisheries monitoring regimes, including 100% port-in and port-out inspections and comprehensive landing verification.

These advances are increasingly underpinned by digital tools. Thai producers are investing in blockchain-based and electronic catch documentation systems compatible with EU initiatives such as the CATCH system and the forthcoming Digital Product Passport. This digital interoperability will support future cooperation on next-generation traceability and transparency standards.

Thai facilities are also consistently open to EU audits, providing transparency that strengthens trust in the integrity of supply chains and assures that Thai products meet or exceed the standards of any other authorized supplier.

3. Mutual Benefits and Value Creation

3.1 Development and Modernization in Thailand

The FTA provides a platform for Thailand's seafood sector to upgrade industrially. Tariff liberalization would encourage processors to move up the value chain by investing in certification, branding, and sustainability systems. This drives innovation, supports digital traceability, and generates higher-quality employment in compliance, auditing, logistics, and technology services.

The agreement would support both partners: It supports industrial modernization and inclusive growth in Thailand, while enhancing competitiveness, affordability, and security of supply for the EU.

It would also stimulate reciprocal investment opportunities. European and Thai companies already collaborate in packaging, certification, logistics, and cold storage services and would benefit from a more predictable, and open environment. In addition, Thai companies would gain clearer access to EU innovation and technology partnerships, fostering shared value creation along the seafood supply chain.

3.2 Resilience and Competitiveness for the EU

For the EU, the FTA enhances seafood supply chain resilience in a sector where processors depend structurally on imported raw materials. Secure access to sustainable, traceable Thai tuna loins ensures predictability and competitive pricing, reducing volatility and safeguarding European processing competitiveness.

As domestic tuna production cannot meet EU consumer demand, imports of loins are a structural necessity. They sustain the EU processing industry, support employment in canneries and underpin related industries including transport, packaging, and retail.

Diversifying suppliers reduces vulnerability to shocks and supports its resilience in a critical food sector. The FTA would directly contribute to the EU's objectives of open strategic autonomy, robust supply chains, and sustainable sourcing under the Green Deal and Farm to Fork Strategy.

Thailand's expanding middle class continues to drive demand for diverse seafood products. In 2025, the country's fish and seafood market is projected to generate US\$8.89 billion (€ 7.6 billion) in revenue, with per capita consumption of 7.9 kg ([Statista](#)). This growth reflects rising interest in premium and imported seafood, particularly among health-conscious urban consumers seeking healthier, protein-rich diets. The trend presents opportunities for EU exporters to introduce new varieties tailored to evolving Thai preferences.

3.3 A Long-Term, Rules-Based Partnership

The agreement would also strengthen the EU's strategic engagement in Southeast Asia. As ASEAN's second-largest economy and a regional logistics hub, Thailand provides a gateway for European exporters and investors. A successful EU–Thailand FTA could pave the way for deeper EU–ASEAN economic cooperation and reinforce the EU's role as a standards-setter in the Asia-Pacific region. It could also become a global benchmark for sustainable seafood trade, showing that market access and sustainability can be mutually reinforcing. It would show that the EU's commitment to high labor, environmental, and governance standards can extend beyond its borders through constructive partnerships with equally committed countries.

4. Supporting EU Processing Resilience

All EU tuna canneries rely historically and structurally on imported loins to meet domestic and export demand, with two thirds of total supply coming from non-EU imports in 2022, showing the EU's dependence on imported tuna products ([AIPCE-CEP](#)

/ Seafood Europe, Finfish Study 2023). Providing preferential access to Thai loins under an FTA would strengthen European competitiveness by ensuring secure, diversified, and traceable supply.

Rather than threatening EU jobs, this access supports them. Loins require significant transformation within EU facilities and form a key input for the seafood processing sector, which comprises more than 3,500 companies and employs around 120,000 people across the EU (Long Distance Advisory Council citing Seafood Europe), contributing to the sector's overall resilience. The EU's tuna manufacturing capabilities are optimized to process loins, meaning Thailand would therefore complement, not compete with, EU processors.

Experience from other markets shows that predictable import access strengthens competitiveness and downstream employment (European Parliament, 2025). The EU–Thailand FTA can achieve the same outcome while ensuring full compliance with EU rules of origin and digital verification via the CATCH system.

5. The Thai Seafood Industry's Commitment

Thailand's seafood industry has demonstrated its ability to meet EU standards. Facilities undergo regular audits, hold international certifications, and comply fully with EU import requirements.

Thailand and its seafood manufacturing companies have invested heavily in traceability, labor, and sustainability programs, including vessel-to-can tracking and social responsibility certifications. These efforts ensure that Thai seafood remains safe, ethical, and environmentally responsible, fully aligned with EU priorities.

An EU–Thailand FTA would build on this foundation, attracting further investment, strengthening resilience, and supporting consumer welfare and choice across Europe.

6. Consumers and Supply Chains

Seafood, including canned tuna, remains one of Europe's most affordable and widely consumed sources of protein. Stable access to imported seafood is vital to consumer welfare: Diversified, sustainable imports keep prices fair, expand choice and support nutrition to reach the European Food Safety Authority's recommendation of eating fish between one and four times per week (see overview per country here).

At a time of rising food and energy costs, prices, maintaining diversified seafood imports through an FTA directly support affordability and food security across Europe. By ensuring steady access to responsibly sourced tuna, the agreement helps shield consumers from supply-driven price spikes and maintains access to healthy protein options within reach for all Europeans.

Diversified sourcing also enhances resilience in the EU seafood value chain, a critical priority in light of recent global supply disruptions.

Conclusion

A strategic EU–Thailand FTA is a logical extension of the EU’s trade policy. For Thailand, it will support industry innovation, investment, and quality employment. For the EU, it will secure resilient, diversified supply chains, reinforce open strategic autonomy, and ensure economic, healthier, affordable, sustainable seafood protein choices for consumers.

By liberalizing tuna products within robust sustainability and traceability safeguards, the FTA would extend the EU’s proven approach with other partners. It would establish a credible framework for fisheries trade, strengthening trust, resilience, and prosperity on both sides.

The Thai Tuna Industry Association urges policymakers to seize this opportunity to deliver an agreement reflecting the shared interests of Thailand and Europe. The EU–Thailand FTA is not about one side gaining at the other’s expense. It is about shared prosperity through sustainable trade, where open markets and high standards go hand in hand.

About TTIA

The Thai Tuna Industry Association (TTIA) is a leading trade organization representing Thailand’s tuna processing sector. Established to promote sustainable growth, TTIA is committed to advancing food safety, ethical labor practices, and environmental stewardship across the industry. Its members adhere to internationally recognized standards, including Good Manufacturing Practice (GMP) and Hazard Analysis and Critical Control Point (HACCP), and actively support the responsible use of fishery resources in line with global principles.

TTIA comprises over 50 member companies, ranging from major processors to packaging and logistics companies. The association’s core goals include promoting sustainable and responsible trade, ensuring compliance with ethical labor standards, enhancing food safety, and aligning with the Bio-Circular-Green (BCG) economic model in support of the UN Sustainable Development Goals.

For media enquiries:

Thai Tuna Industry Association (TTIA)

✉ ttia@thaituna.org | 🌐 thaituna.org/en/home/

ttia@thaituna.org

thaituna.org/en/home/