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REPORT FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THE COMMITTEE OF THE REGIONS

on the Implementation and Enforcement of EU Trade and Economic Security Policy

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I. Introduction

This is the sixth consolidated **annual report**[1] on the **implementation and enforcement of EU trade and economic security policy.** It provides an update on the evolution of trade flows between the EU and its preferential partners for goods and services and gives an overview of the EU's main activities and achievements steered by the European Commission's Chief Trade Enforcement Officer in 2025[2].

This report focuses on the implementation and enforcement of international commitments in EU preferential trade agreements and the WTO. The Commission produces separate reports on areas relating to trade and economic security, notably foreign direct investment screening and export control/dual use. Other trade-related areas covered by dedicated Commission reports include the EU Generalised Scheme of Preferences (GSP), intellectual property rights and the International Procurement Instrument.

Implementation and enforcement of international trade commitments under the WTO and bilateral trade agreements continues to lead to concrete benefits, facilitating access to export markets, strengthening the resilience of the European economy, accelerating diversification and reducing dependencies.

First, European businesses have been able to benefit from the opportunities created by the EU's large network of 44 preferential trade agreements. Their effective implementation and enforcement continue to lead to **strong export growth** as the following examples show.

- The ***ex-post* evaluation**[3] of the **EU-Canada** Comprehensive Economic and Trade Agreement (CETA), published in June 2025, suggests that predictable and cooperative trade works. Since it was first provisionally applied in 2017, CETA has boosted trade exports and diversified supply chains across all EU Member States and increased the EU's gross domestic product by EUR 3.2 billion each year. Direct benefits include a 71% increase in bilateral trade in goods and services between the EU and Canada (from EUR 72.2 billion in 2016 to EUR 123 billion in 2023), a 64% increase in EU goods exports and an 81% increase in EU services exports to Canada.

- The **EU-Chile Interim Trade Agreement** (ITA), in force only since February 2025, showed robust growth during the first 11 months of its implementation for a total of EUR 20.8 billion. EU shipments of machinery and appliances grew by 9.1%, and exports of chemical products grew by 8.5%.

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[1] The Commission's web page on Implementing and Enforcing EU Trade Agreements contains supplementary information to this report on: (i) the evolution of EU trade with preferential partners in 2025; (ii) the use of tariff preferences on EU exports and imports from preferential trading partners, for both the EU and Member States; and (iii) data on the use of tariff rate quotas under certain trade agreements.

[2] Information on individual EU trade agreements can be accessed via the Commission's EU Trade agreements website, which links to individual country pages, providing fact sheets, guides and success stories, and a link to the reports after meetings of joint committees and dialogues.

[3] https://policy.trade.ec.europa.eu/analysis-and-assessment/ex-post-evaluations_en.

- EU exports of goods to **Japan** grew by 14% between 2018 (the year before the EU-Japan Economic Partnership Agreement entered into force) and 2025. EU services exports increased by 57%.

Second, EU trade agreements and partnerships continued to support **supply chain resilience** by helping the EU to secure critical inputs, such as energy and raw materials, and to **reduce its overdependence on single sources of supply.**

EU trade agreements continue to play a significant role in supporting a **stable source of imports of raw materials and energy products** needed for the EU economy, as the following examples show.

- Imports of raw materials and energy products from **Canada** have sharply increased since 2022, and this trend continued in 2025, with more than a quarter of the EU's mineral product imports coming from Canada. Imports from **Canada** increased by 14% (in value terms) between 2024 and 2025, continuing the trend observed since 2022, reaching EUR 6.1 billion.

- Since the entry into force of the **EU-Chile** ITA in February 2025, EU imports of mineral products have grown by 33%.

- Preferential partners supply a quarter of the EU's critical raw materials (CRM) imports. While the total EU imports of critical raw materials[4] in value terms remained relatively stable in 2025 versus 2024 with a slight increase of 0.32%, imports from some resource-producing trade partners such as **Canada** and the **Democratic Republic of Congo** registered strong increases. Thus, EU critical raw materials imports from **Canada** increased by 62% in value terms to EUR 3.3 billion. For the same reference period EU critical raw materials imports from the Democratic **Republic of Congo** increased by 79% in value terms to EUR 2.9 billion.

Non-preferential trading partnerships also tend to facilitate CRM imports, such as the Economic Partnership Agreement and the Strategic Partnership between the EU and Kazakhstan. For example, EU imports of raw materials from **Kazakhstan**[5] increased by 32% in value terms in 2025 compared with 2024, reaching EUR 1.18 billion.

The EU's large network of trade agreements has also strengthened its **geopolitical presence** in a rapidly deteriorating international environment.

[4] Data for critical and strategic raw materials as defined in the Critical Raw Materials Act (CRMA).

[5] An Enhanced Partnership and Cooperation Agreement between the EU and Kazakhstan has been in application since 2016 and in force since 2020. In 2022, the parties concluded a strategic partnership on raw materials: EU trade relations with Kazakhstan.

- For example, the EUR 54.5 billion fall in EU exports of goods to Russia in 2025 (compared with the 2019-2021 average) was more than offset by an **increase of over EUR 250 billion in EU exports to EU free trade agreement (FTA) partners** that year.

- The EUR 8 billion fall in exports of **vehicles and vehicle parts** to Russia in 2025 (compared with the 2019-2021 average) was offset by higher EU exports to the UK worth EUR 9.7 billion alone. And the EUR 7 billion decrease in **electrical machinery** exports to Russia was offset by higher exports (EUR 9 billion) to a range of trading partners, including Switzerland, the UK, Mexico and Norway.

Beyond market access, EU trade agreements continued to play a major role in **strengthening trade and sustainable development in 2025**.

- **Japan, Chile and Angola**, among others, took steps towards ratifying fundamental conventions of the International Labour Organization (ILO).

- The Commission closed its preliminary assessment of two external complaints regarding **Viet Nam** concerning labour and related human rights issues. It also received a new complaint about alleged infringements of trade and sustainable development (TSD) commitments by **Ecuador** and its first complaint regarding the GSP, concerning **Pakistan**.

II. Making the most of EU preferential trade agreements

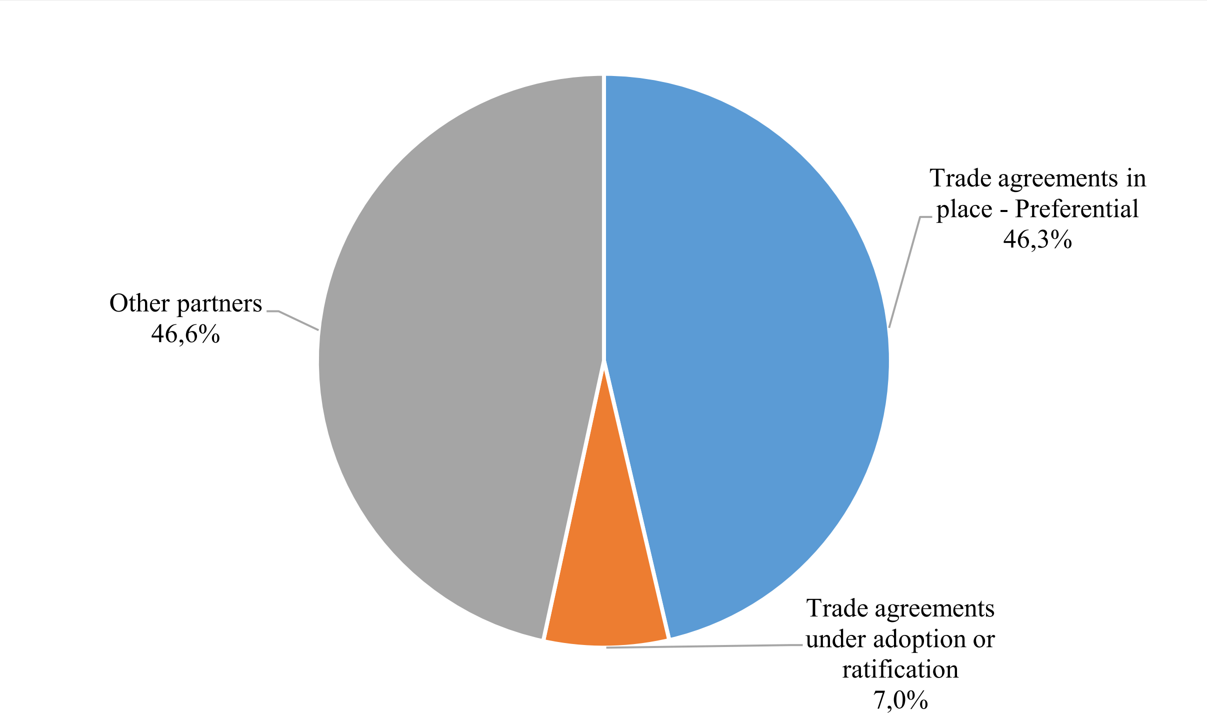
II.1 EU trade with preferential partners in 2025

At the end of 2025, the EU had 44 preferential trade agreements in place with 76 partners, corresponding to 46.3% of total EU external trade. Total EU trade with preferential partners amounted to EUR 2 390 billion, of which EUR 1 340 billion were exports and EUR 1 050 billion were imports. The EU's trade balance with preferential partners rose from EUR 276 billion in 2024 to EUR 289 billion in 2025.

2025 and the first quarter of 2026 also saw the conclusion of trade agreements with Mercosur[6], Mexico, Indonesia, India and Australia, following intense negotiations with these partners. Together, they will bring up the share of EU preferential trade to 53.3%, as Figure 1 shows.

[6] The trade agreement between the EU and Mercosur has been provisionally applied since 1 May 2026.

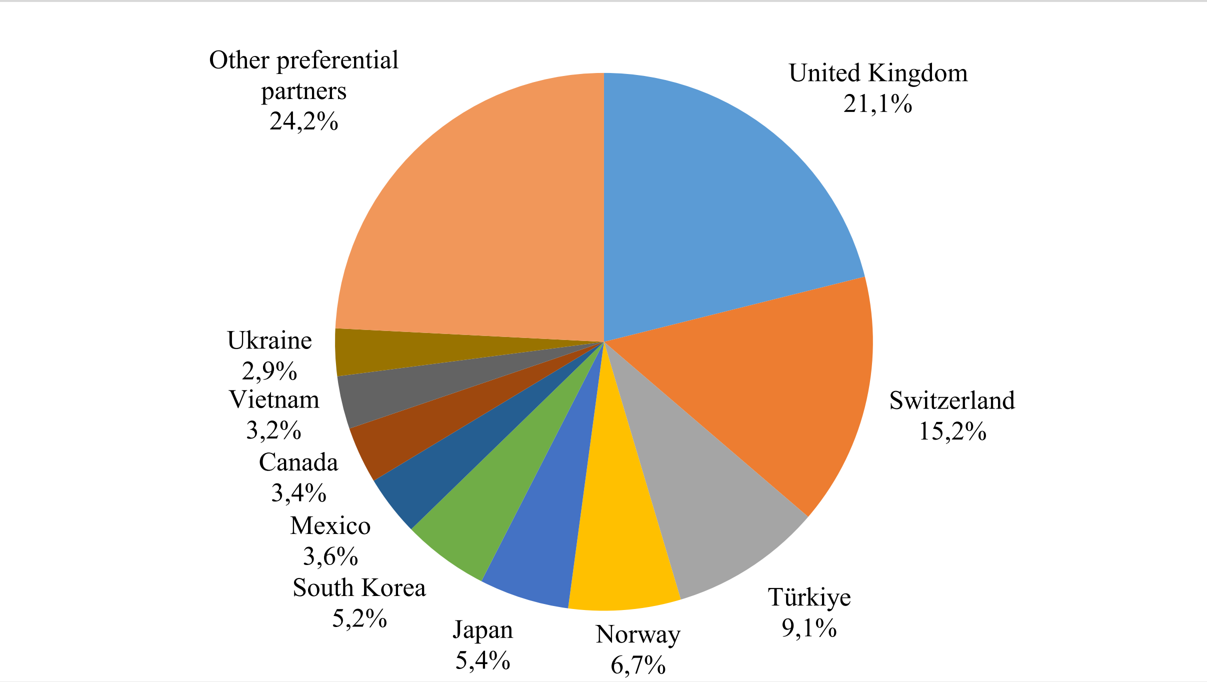
Figure 1: EU external trade (2025)



Source: DG TRADE calculations based on Eurostat Comment

As shown in Figure 2, the EU's largest preferential partners remained the United Kingdom (21.1% of EU trade with preferential partners), followed by Switzerland (15.2%), Türkiye (9.1%), Norway (6.7%) and Japan (5.4%). Together, these five partners accounted for close to 60% of the EU's preferential trade in 2025.

Figure 2: EU trade by preferential partner (2025)

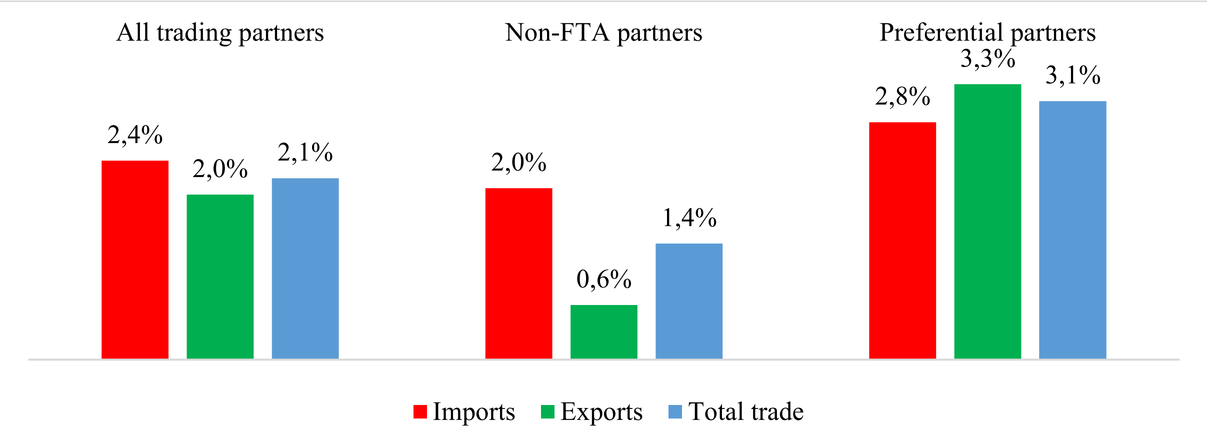


Source: DG TRADE calculations based on Eurostat Comext

As shown in Figure 3, the EU's annual trade in goods with preferential partners continued to outgrow its trade with all partners combined and the subgroup of non-FTA partners.

EU trade with preferential partners increased by 3.1% between 2024 and 2025, more than trade with all partners and non-FTA partners, which increased by 2.1% and 1.4%, respectively. Exports of goods to preferential partners rose by 3.3%, while exports to all partners combined and to the subgroup of non-FTA partners increased more moderately (by 2.0% and 0.6% respectively).

Figure 3: Annual growth in trade of EU goods by type of partner (2024-2025)

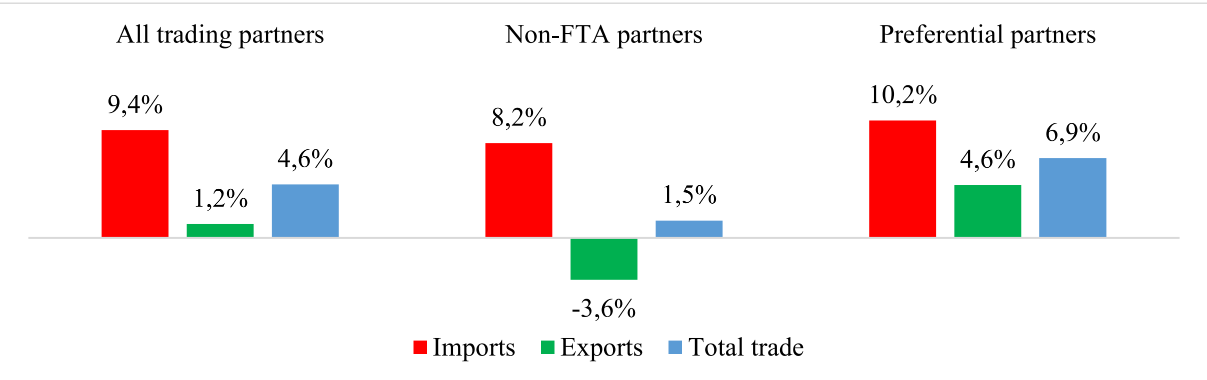


Source: DG TRADE calculations based on Eurostat Comext

EU trade agreements in 2025 also continued to **boost EU agri-food trade with preferential partners**, which showed stronger growth (6.9%) than with non-FTA partners (1.5%) and all trading partners (4.6%). Agri-food trade represented 9% of EU total exports and 7.5% of imports and contributed 37% of the overall EU trade surplus.

As Figure 4 shows, **EU agri-food exports to preferential partners** grew by 4.6%, EU exports to all partners combined increased by 1.2%, and EU exports to non-FTA partners decreased by 3.6%.

Figure 4: Annual growth in trade of EU agri-food products by type of partner (2024-2025)



Source: DG TRADE calculations based on Eurostat Comext

In 2025, the **UK** confirmed its role as the leading destination for EU agri-food exports among preferential partners and all partners, with exports exceeding EUR 55 billion, up 3% compared with 2024. EU exports to the second-largest destination, **Switzerland,** were around EUR 13 billion in 2025, an increase of 7.5%. **Japan** was the third-largest destination among preferential partners, with EU agri-food exports of over EUR 8 billion.

EU trade agreements, such as the **EU-Canada** CETA, have strongly supported export growth in agri-food products since their application. According to the *ex-post* evaluation concluded in 2025[7], some agri-food sectors have seen a strong increase in exports.

- For example, EU wine exports to Canada grew on average by 39% in the period following the provisional application of the agreement (2018-2025), compared with the corresponding period before the agreement (2010-2017).

- Exports of extra virgin olive oil rose by 46%, and cheese exports nearly doubled, increasing by 96%.

EU imports of agri-food products from preferential partners also showed stronger growth (10.2%) compared with non-preferential partners (8.2%).

- The **UK** remained the EU's largest source of preferential agri-food imports in 2025, accounting for 8% (or EUR 16.0 billion) of total EU agri-food imports, followed by **Ukraine** (EUR 11 billion).

- **Côte d'Ivoire** was the third-largest source of agri-food imports into the EU from preferential trade partners, with those imports worth EUR 8.9 billion in 2025. Total imports from Côte d'Ivoire increased by 23% in value between 2024 and 2025, whereas agri-food imports increased by 31%. Higher cocoa prices contributed to this growth, but the EU-Côte d'Ivoire Economic Partnership Agreement has helped the country diversify its exports by lowering tariffs on processed cocoa.[8]

By the end of 2025, **EU geographical indications** were protected in 35 non-EU countries under trade agreements.

- For example, the **EU-Chile ITA** provides a strengthened framework for the protection of 216 EU geographical indications (GIs). This is in addition to the existing wines and spirits agreement, which already safeguards 1 745 EU wine GIs and 257 spirits and aromatised wine GIs. The ITA ensures a high level of protection for the respective protected Gis and allows for new GIs to be added in the future.

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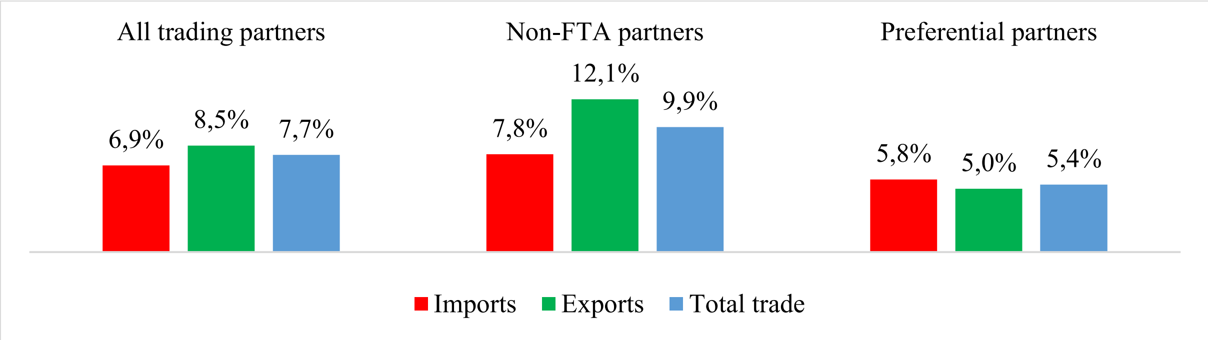
[7] https://policy.trade.ec.europa.eu/analysis-and-assessment/ex-post-evaluations_en.

[8] Processed cocoa amounted to 42% of the total value of EU cocoa imports from Ivory Coast in 2025.

EU trade in services with preferential partners reached nearly EUR 1.4 trillion in 2024 (latest figures available), representing 47% of total EU trade in services, and grew by 5.4% in 2024 compared with 2023. As Figure 5 shows, this marked faster growth than in the previous year (5.0%), but slower than the growth in trade with all partners and non-FTA partners[9].

Figure 5: Annual growth in EU trade of services by type of partner (2023-2024)



Source: DG TRADE calculations based on Eurostat table 'bop_its6_tot'

The EU's total trade balance in the services sector increased by 21.1%, reaching EUR 193.7 billion in 2024. The trade surplus with preferential partners amounted to EUR 184.3 billion, compared with EUR 9.4 billion for all trading partners combined.

The **value of EU trade agreements for trade in services** is also illustrated by the gradual deepening of market access for services sectors, as made possible by ambitious trade agreements, such as the one with **Canada.**

- Bilateral cross-border trade in services between the EU and **Canada** has increased by 97% since the provisional application of the agreement in 2017, reaching EUR 50.8 billion in 2024, compared with EUR 25.6 billion in 2016.

- In December 2025, a **mutual recognition agreement** (MRA) on the **recognition of the professional qualifications of architects** entered into force. It enables EU architects to obtain a Canadian architect's licence and Canadian architects to obtain a licence in an EU Member State, provided they meet certain qualification and experience-based criteria. The MRA is part of the EU-Canada CETA, which aims to strengthen collaboration and facilitate the recognition of professional qualifications across the Atlantic.

In 2025, the **EU remained the world's leader** in both exports and imports of **digitally deliverable services**, which amounted to EUR 1.7 trillion in 2024, or 58% of the EU's total trade in services.

[9] Top EU trading partners without an FTA, such as the US (the EU's largest services trading partner) and China (the EU's fourth-largest services trading partner), saw strong economic growth in 2024, while the United Kingdom and Switzerland, the EU's second and third-largest trading partners, saw modest growth overall, including trade in services.

- Existing trade agreements with **digital trade chapters** include those with Japan, the UK, New Zealand and Chile.

- In May 2025 the EU signed its first dedicated digital trade deal with a non-EU country. The standalone **digital trade agreement** (DTA) with **Singapore**[10] boosts digital trade between the two regions by facilitating cross-border data flows and ensuring legal certainty for businesses. On 10 June 2026, the EU signed a DTA with the Republic of Korea[11]. In March 2026, the EU launched negotiations on an EU-Canada DTA.

- DTAs complement the respective free trade agreements with modern and binding rules on digital trade. These rules aim to increase transparency and predictability for businesses, promote a secure online environment for consumers, and counteract digital trade barriers.

2025 also saw the first full year of implementation of the **EU-Angola Sustainable Investment Facilitation Agreement (SIFA)**, which focuses on creating a more predictable business-friendly investment climate. To achieve this, the bilateral Committee on Investment Facilitation in January 2025 discussed specific steps to cut red tape and increase transparency, including: (i) modernising Angola's digital single window for investors; (ii) publishing online a list of requirements and conditions on foreign investment in Angola; and (iii) granting free access to the online version of Angola's Official Journal. In early April 2026, the Commission concluded negotiations on a SIFA with **Ecuador,** the EU's first such agreement with a Latin American country.

In November 2025, the EU signed its first **clean trade and investment partnership** (CTIP) with **South Africa**. The CTIP will support bilateral trade and investments in clean supply chains, creating new trade and investment opportunities, and strengthen EU access to raw materials. The inaugural inter-governmental dialogue took place on 8 and 9 July 2026, building on a business–to-government dialogue[12] that took place beforehand, which had gathered business views and priorities for implementing the CTIP.

II.2 Promoting EU trade agreements

In 2025, the Commission, in close cooperation with Member States and business, continued to step up efforts to **promote new agreements.**

- The Commission continued to **upgrade its main platform Access2Markets**[13], which has attracted over 13 million visitors since its launch in 2020, including nearly 3 million in 2025 alone. A survey was launched to collect user feedback, and the Commission started work on adding new features, such as a new design and video tutorials. So far,

[10] EU-Singapore Digital Trade Agreement | EUR-Lex.
[11] Text of the agreement: Circabc.
[12] Press release: South Africa –European Union Clean Trade and Investment Partnership enters implementation phase with inaugural business-to-government dialogue | EEAS.
[13] https://trade.ec.europa.eu/access-to-markets/en/home.

the Commission has trained 16 000 stakeholders to use the platform, mostly through webinars held in multiple languages.

- In 2025, senior Commission staff participated in **Market Access Days** organised in eight Member States. These events gave more than 5 000 businesses (many of them SMEs) across multiple sectors the opportunity to directly engage with the Chief Trade Enforcement Officer and other senior Commission representatives.

- Outreach in Brussels and EU capitals was complemented by consolidated outreach efforts by **EU Delegations** in partner countries to promote new trade agreements with stakeholders on the ground. These activities targeted EU companies and importers of EU products and services who need specialised guidance.

    - For example, the first-ever **EU-New Zealand Business Summit** held on 24 October 2025 in Auckland, brought together 500 business and political representatives from both sides to help seize the new opportunities created by the FTA. The EU Delegation in Wellington promoted the FTA in agricultural shows in Hamilton (June) and Christchurch (November).

    - To promote the **EU-Chile** ITA, the EU Delegation in Santiago rolled out a campaign 'Europa está a la vueltITA' (Europe is just around the corner) and 'Europa está cerquITA' (Europe is close by), including broad coverage on social media and the Chilean radio network. This aimed to bring the ITA closer to the public, showing how it represents a real opportunity for Chile, its consumers and its businesses.

II.3 Trade and sustainable development in focus

EU trade agreements play a **key role** in **strengthening trade and sustainability**. Provisions promoting international labour and environmental standards have been part of the 15 agreements concluded since 2012 (starting with the trade agreement between the EU and the Republic of South Korea) and were applied over the reporting period.

In 2025, work continued to ensure effective implementation of these commitments, and progress was made with several partner countries.

- **Japan, Chile** and **Angola** took steps towards ratifying ILO fundamental conventions relating to occupational safety and health.

- **Japan**, following comments by the ILO Committee of Experts on the Application of Conventions, started moving away from its Technical Intern Training Programme towards the Employment for Skill Development programme, taking on board comments of the ILOs Committee of Experts on the Application of Conventions. In addition, Japan also started to move towards a mandatory emission trading scheme (GX ETS) for its green transition.

- **Moldova** made good progress in adopting its national energy and climate plan in 2025. It published its nationally determined contributions under the Paris Agreement and strengthened its monitoring reporting and verification system of greenhouse gas emissions

Regular meetings of **joint TSD committees and boards** are where the parties discuss TSD issues. In 2025 again, bilateral engagement with partner countries delivered concrete outcomes.

- The **EU- New Zealand** Trade Committee adopted an amendment to the TSD Chapter, reflecting the upgrade of occupational safety and health to the status of 'fundamental principles and rights at work', in line with decisions taken by the ILO.

- In November 2025, following the **EU-Singapore** TSD Board's confirmation of a mutual commitment to make continued and sustained efforts towards the ratification and effective implementation of ILO fundamental conventions, the Singapore parliament passed the second Workplace Fairness Bill, a key step in advancing the ratification of fundamental ILO Convention on discrimination in employment and occupation (C111). The Bill sets out a new framework for workers to seek redress for workplace discrimination and introduces safeguards against frivolous claims[14].

- Following the entry into force of the **EU-Chile ITA** on 1 February 2025, the EU and Chile started their review of the TSD provisions. This review is provided for in the Joint Statement on the TSD Review attached to the ITA and aims to upgrade the enforcement mechanism and include the Paris Agreement as an 'essential element'.

In 2025, the Commission continued its close engagement with civil society, including through **domestic advisory groups** (DAGs) bringing together business, trade unions and other stakeholders. DAGs are set up under 16 EU trade agreements[15] to engage with civil society representatives in partner countries and to advise the Commission on implementation issues.

- In 2025, the EU and the **Central America** DAGs reached a consensus for the first time to issue a joint statement to propose specific technical cooperation on labour and environmental matters. The EU and all four **Andean** DAGs issued their first-ever unanimous joint declaration, a further step in cross-regional civil society cooperation.

- The EU DAG for **Japan** proposed to deepen exchanges on green shipping corridors, with a focus on ensuring green and just transition go hand in hand. The **Japan DAG** used the joint dialogue with civil society to embrace the EU's more regulatory-based approach to the green transition, suggesting that Japan should also step up its ambitions.

[14] A first bill was passed on 8 January 2025. The workplace fairness laws are expected to take effect by the end of 2027 to give employers sufficient time to implement them effectively.
[15] State of play on 1 July 2026: 16 DAGs (including the Cariforum Consultative Committee).

In 2025, the Commission also continued to investigate and make progress on **complaints on alleged TSD infringements.**

- The Commission, in 2025, **closed its preliminary assessment** on two complaints regarding **Viet Nam**. The analysis showed that there are still concerns on labour issues, in particular regarding the ratification of ILO Convention 87. Viet Nam did not show that the adoption of its amended Law on the Trade Unions and the changes to the Vietnamese Constitution could be interpreted as steps towards fulfilling the country's obligation to make 'continued and sustained efforts for the ratification of this ILO convention'. The Commission requested additional detailed information and clarifications and continues raising this matter at all levels with its Vietnamese counterparts.

- The Commission received one **new complaint** concerning **Ecuador,** claiming that the country has not fulfilled its obligations under its trade agreement with the EU, such as on the recognition of sectoral trade unions and freedom of association. The case covers both labour and environmental matters and is currently under review.

- In 2025, the Commission received the first complaint regarding the **Generalised System of Preferences** (concerning **Pakistan**), which is currently under review.

Finally, to further compliance with TSD commitments and to bring about real change on the ground in partner countries, the EU continued to offer **technical assistance** to its trading partners in 2025.

- The EU continued its collaboration with the ILO to implement the **Trade for Decent Work programme**[16]**.** The programme serves to promote social dialogue and supports better application of international labour standards in priority partner countries, particularly in Africa and Asia.

- The EU, in 2025, partnered up with the Food and Agriculture Organization (FAO) and the private sector to launch the **Boosting Sustainable Food Production in Kenya** programme. This EUR 10 million EU-funded project targets 40 000 smallholder farmers and supports climate resilient food production in five counties in Western Kenya.

III. Helping SMEs find their place in global trade

In 2025, the Commission used a variety of instruments again to help EU businesses make the most of EU trade agreements, with special consideration for the specific needs of smaller and medium-sized enterprises (SMEs)[17].

[16] Trade for Decent Work.
[17] Nearly 682 000 EU SMEs were exporting goods and services in 2023 (latest figures available).

First, this is done via **dedicated SME chapters**[18] in EU trade agreements with specific commitments to facilitate market access by smaller companies. Contact points on both sides regularly meet to consider SME-relevant issues across the whole agreement. For example, following the entry into force of the **EU-New Zealand** trade agreement, the SME contact points met twice to ensure that specific content is provided on websites and information platforms that cater to SMEs.

Second, the Commission pursued its successful and well-established cooperation with the **Enterprise Europe Network**[19] (EEN) in 2025. The Network offers guidance and services to SMEs with international ambitions, including start-ups and scale-ups. This is done with the help of its established nodes in over 20 strategic markets outside the EU, such as Brazil, Canada, India, Japan, Mexico, Singapore, the United Kingdom and Viet Nam.

IV. Addressing barriers and finding solutions

In 2025, a combination of ongoing geopolitical tensions, economic fluctuations and shifts in trade policies continued to shape the global trade landscape. One of the main challenges involved managing volatile relations with **China** and the **US,** the EU's largest non-preferential trading partners.

The **EU-US** trade deal of 27 July 2025 and the EU-US Joint Statement of 21 August 2025[20] set out the political commitment on both sides to work towards restoring stability and predictability in the EU-US trade and investment relationship, for the benefit of businesses and citizens. The EU remains convinced that high tariffs are detrimental to the global economy. However, the negotiated outcome creates a basis for continued dialogue and the development of the transatlantic relationship, including by lowering tariffs and pursuing cooperation in areas of shared strategic interest. For instance, on 24 April 2026, in the area of critical minerals, the EU and the US signed a Memorandum of Understanding[21] on a strategic partnership on critical minerals and agreed on an EU-US Critical Minerals Action Plan[22]. The EU continues to work with the US to find solutions, especially where EU exports face tariffs exceeding the 15% tariff ceiling, including on steel and aluminium, copper and their derivatives, as well as trucks and truck components. In this regard, the US has already de-listed certain products from the steel and aluminium derivative list, reduced tariff treatment for industrial machinery products, as well as simplified and provided clarity on how the tariffs are applied. While this is a step in the right direction, the EU will continue to engage with the US to ensure that all EU exports of derivatives should benefit from the 15% tariff ceiling and should not be subject to any further administrative requirements, in line with the EU-US Joint Statement.

[18] EU trade agreements in place in 2025 with SME chapters: Canada, Japan, the UK, New Zealand and Chile.
[19] https://een.ec.europa.eu/.
[20] Joint Statement on a United States-European Union framework on an agreement on reciprocal, fair and balanced trade - Trade and Economic Security.
[21] Circabc.
[22] Circabc.

With **China**, progress was made on preserving the ability of European technology companies to effectively defend their intellectual property rights (standard essential patents, such as those used in mobile communications).

Countries and trade blocs worldwide continue to grapple with finding a balance between protecting domestic industries and ensuring a free and fair-trading system is in place. Therefore, the monitoring of market access commitments taken by EU trading partners remains a key priority.

IV.1 Update on market access barriers

New barriers registered in 2025[23]

A total of **13 new barriers were registered** in the Commission's Market Access Database in 2025**.** Import tariff measures and taxes constituted 6 new barriers: 3 of them concerned sanitary and phytosanitary measures and technical barriers to trade, and 1 measure concerned restrictions to government procurement.

The US and Canada registered the highest number of new trade barriers (4 and 2, respectively). The Southern Mediterranean region[24] registered 3 new trade barriers (compared with 8 in 2024). This was closely followed by the region of South and Southeast Asia, Australia and New Zealand, which registered 2 new barriers (compared with 6 in 2024). The Far East and Africa and Pacific registered 1 barrier each.

Barriers partially or fully resolved and positive developments in 2025[25]

Progress was made in tackling trade barriers, with **20 barriers fully or partially removed in 14 partner countries**. This was achieved through a combination of diplomatic outreach and the effective use of institutional mechanisms under bilateral trade agreements and in the WTO, as the following examples show.

- **Japan** lifted import suspensions of animal products, following confirmation by the respective countries that animal health conditions are respected (for instance, for Swedish pork, processed Polish beef products and Belgian beef and beef products).

- **Viet Nam,** following its Law on Pharmacy of 21 November 2024, issued a new circular regulating the registration of drugs and drug ingredients. The circular, which entered into force on 1 July 2025, included a fast-track authorisation mechanism that reduces the evaluation period from four or five years to nine months for innovative medicines

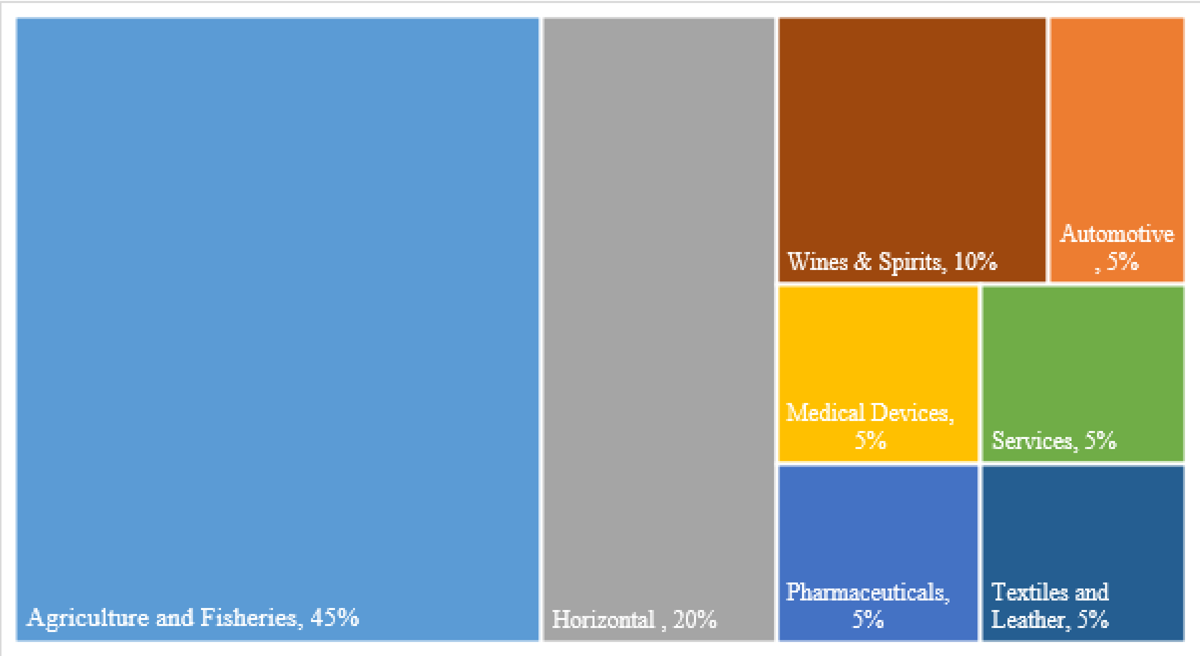
[23] See list on DG TRADE's implementation and enforcement page: Implementing and enforcing EU trade agreements - Trade and Economic Security.
[24] Southern Neighbours, Middle East, Türkiye, Russia and Central Asia.
[25] See list on DG TRADE's implementation and enforcement page: Implementing and enforcing EU trade agreements - Trade and Economic Security.

already authorised by stringent regulatory authorities, such as the European Medicines Agency.

- Following regular engagement between the EU and **Argentina,** Argentina permanently reduced export duties on major agricultural commodities and their by-products. A new decree adopted in December 2025 set lower export-duty rates for several grain chains, including soybeans, wheat and barley.

As shown in Figure 6, most of the barriers tackled (45%) related to **the agriculture and fisheries sector.** Additionally, 20% of cases addressed cross-sectoral issues.

Figure 6: Percentage of barriers tackled per sector (2025)



The Commission made additional progress in tackling barriers over the reporting period in close cooperation with Member States' trade counsellors and industry associations. This has a direct positive impact on European businesses in the sectors concerned, helping them to reduce costs and improve market access for EU exporters and securing the supply of important industrial inputs.

Continuous engagement with partner countries again brought **positive developments** in 2025, as illustrated below.

- **Singapore** recognised the EU regionalisation measures for highly pathogenic avian influenza, African swine fever and foot-and-mouth disease, paving the way for more EU agri-food exports. The country also put in place trade-facilitating measures on the 'born and raised certificate' and granted country approval to Greece and Lithuania for several types of egg and meat products.

- **Viet Nam** authorised the import of 14 animal products and 2 plant products from the EU, while 4 additional products reached the final stage of the approval process, which reduced the backlog of market access authorisations. In addition to progress on individual files, the Vietnamese authorities agreed to conduct combined audits covering several Member States and products, a step which helps save time and resources.

- Following a high-level mission by the Commission to **Brazil** in October 2025, the country approved several plant products and pre-listed 48 animal products from 18 Member States.

Positive developments were also registered on **behind-the-border measures**, such as technical barriers to trade and regulatory obstacles, which has facilitated European companies' market access in a variety of sectors.

- **Colombia**, thanks to intense bilateral discussions with the EU, decided to recognise the EU's free sales certificates to prove product compliance with Colombia's technical regulations. Consequently, EU wine producers who want to export to Colombia will no longer be required to go through additional testing. EU wine exports to Colombia in 2025 amounted to around EUR 33 million, about four times higher than in 2013 when the agreement first started to apply.

- Thanks to the EU's work at bilateral and multilateral level, **India removed quality control orders** on 115 EU products exported to India. EU exports had previously been affected or sometimes halted[26] by technical regulations referencing India-specific standards (despite the existence of international standards) and stricter-than-necessary conformity assessment procedures, such as mandatory testing by Indian laboratories.

In 2025, the Commission continued to tackle restrictions imposed by certain trading partners, particularly on **raw materials exports**, ranging from export bans to export licensing requirements and quotas. The Commission has been tackling these restrictions directly at bilateral level, at dedicated government-to-government meetings and through the relevant WTO channels.

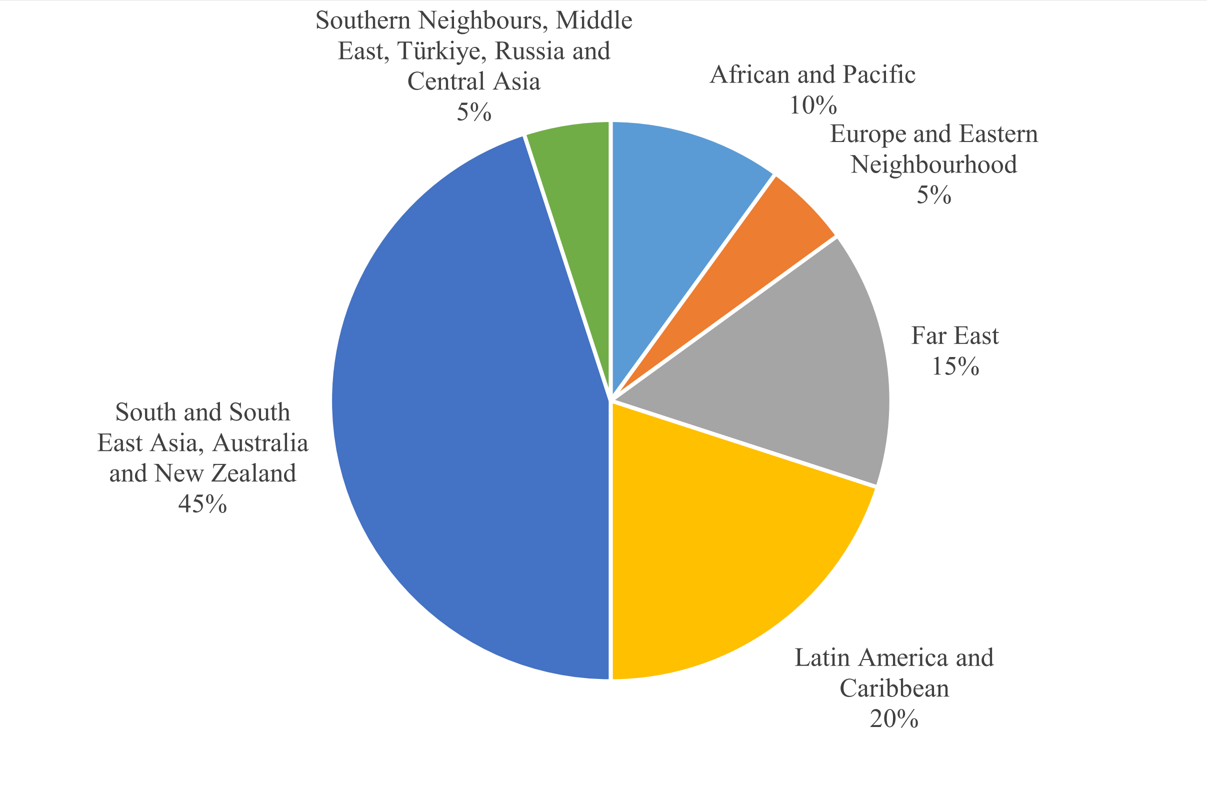
- For example, recent engagement between the Commission and the government of the **Democratic Republic of Congo** (DRC) helped to avert a ban, introduced in February 2025, on exports of all cobalt derivatives. The ban would have had negative consequences for some EU refineries dependent on these raw materials. In October 2025, the DRC replaced the ban with a quota system capping 2026 and 2027 exports (alongside a strategic reserve) to stabilise prices and increase domestic value. The

[26] For example, the EU exported on average EUR 1.4 million of viscose staple fibre to India before 2023 when the quality control orders were introduced; after they were introduced, EU exports were essentially halted.

Commission continues to monitor the situation to ensure that the EU's interests are not undermined.

As shown in Figure 7, **most of the barriers fully or partially removed** (9 out of 20) **concerned countries in the region comprising South and Southeast Asia, Australia and New Zealand**. This was followed by countries in the Latin America and Caribbean region, with 4 barriers removed in 2025.

Figure 7: Percentage of barriers tackled per region (2025)



IV.2 Update on the Single Entry Point for complaints

The Commission's **Single Entry Point**[27] is a centralised platform for companies, trade associations and other EU stakeholders to report trade barriers more easily. Complaints may be submitted using dedicated online forms on the Access2Markets platform.

[27] https://trade.ec.europa.eu/access-to-markets/en/content/single-entry-point-0.

EU stakeholders need to complete these forms to give the Commission sufficient information to carry out a preliminary assessment and determine the appropriate course of action. The Commission may also, if necessary, launch a complaint on its own initiative (*ex officio*).

A practical example: Malaysia's food regulations

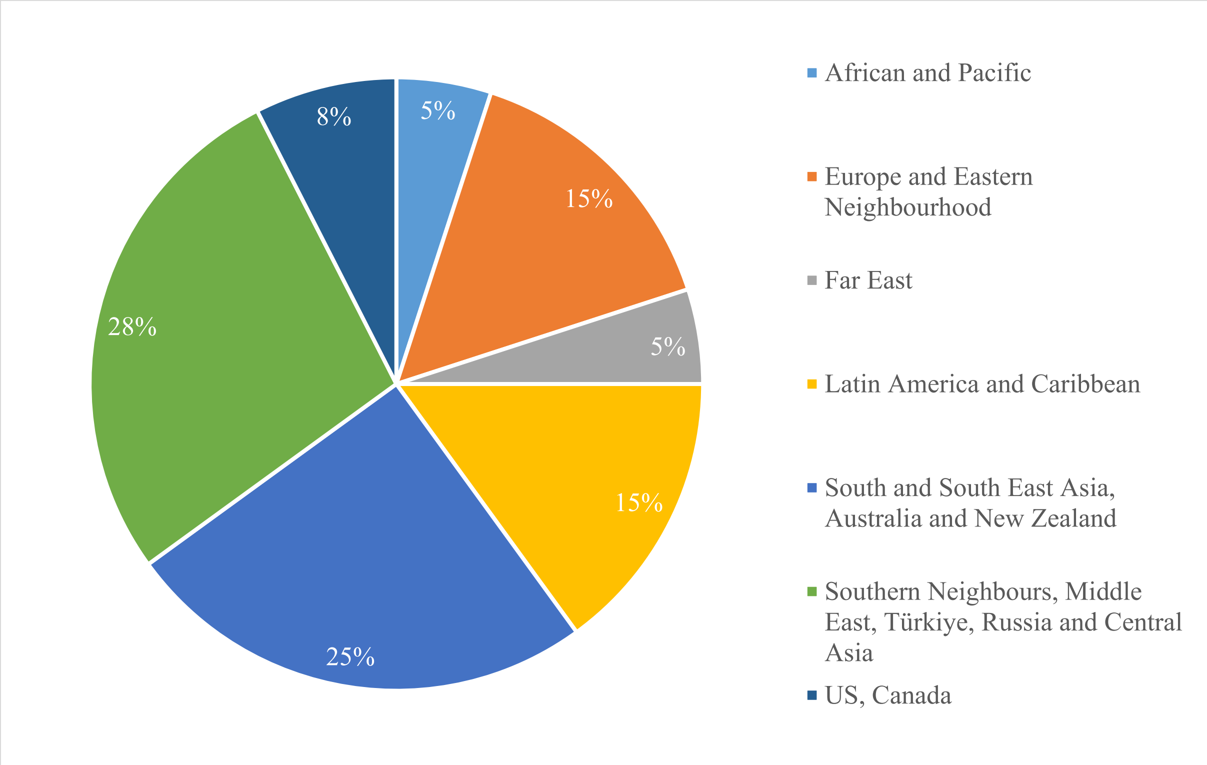
Complaint: On 23 November 2023, the Single Entry Point received a complaint concerning an amendment introduced by **Malaysia** to its Food Regulation. The amendment mandated a minimum/maximum alcohol content (by volume) for certain wines and spirits, effectively preventing imports of certain EU wines and spirits into the country.

Action taken: Following the EU's sustained engagement with Malaysia both bilaterally and in the WTO Technical Barriers to Trade Committee, Malaysia agreed to adjust its provisions in its Food regulation on alcohol content in liqueurs and wine, as well as updates on preservatives, colourants and other technical aspects. In October 2025, Malaysia officially published in its Federal Gazette amendments addressing the EU's concerns relating to some alcoholic beverage standards (rum, sloe gin and liqueurs). Other amendments are still outstanding, and bilateral engagement continues.

Impact: EU exporters can benefit from these updated rules, marking a concrete achievement in improving market access.

As shown in Figure 8, in 2025, the Single Entry Point received 40 external complaints about trade barriers in 21 partner countries. The largest number (28%) concerned the Southern Neighbours, the Middle East, Türkiye, Russia and Central Asia, followed by South and Southeast Asia, Australia and New Zealand (27%).

Figure 8: External complaints submitted in 2025 by region



Since its launch in 2020, the Single Entry Point has received an average of 40 external complaints per year. In 2025, most external complaints concerned horizontal measures and services (6 complaints each) and the agriculture and fisheries sector (5). Most complainants were individual EU businesses (18) and trade associations (15), followed by other stakeholders (4) and EU Member States (3). The Commission launched 1 *ex officio* complaint.

V. Bilateral and multilateral dispute settlement

While most barriers continue to be tackled by bilateral engagement with the trading partner through bilateral trade committees or WTO committees, it remains necessary in some cases to move to initiate formal dispute settlement procedures, either under a bilateral agreement or in the WTO.

Dispute settlement remains an important avenue for EU enforcement action. It is a well-established, rules-based approach to dispute resolution that provides legal certainty and predictability to traders, businesses and governments.

In 2020, to address the paralysis of the WTO's Appellate Body, the EU and other WTO Members put in place the **Multi-Party Interim Appeal Arbitration Agreement** (MPIA). The MPIA ensures that WTO rules can be enforced through adjudication in the WTO and cannot be 'appealed into the void'. After several accessions in 2025 and in the beginning of 2026 in the lead-up to the WTO 14th Ministerial Conference, the MPIA[28] now covers 61 of the WTO's 166 members (counting EU Member States), accounting for 60% of world trade.

In January 2025, the EU launched a **WTO dispute against China** on worldwide licensing terms for standard essential patents (DS632). The panel proceedings are currently ongoing.
In July 2025, the EU launched arbitration proceedings under the **EU-Algeria** Association Agreement in relation to Algeria's trade and investment restrictions.

The following disputes concluded in 2025, resulting in the **removal of trade barriers** in partner countries.

- In July 2025, in DS611 (China- Enforcement of International Property Rights), the WTO Appeal Arbitrator found that China's unwritten anti-suit injunction policy violated the Agreement on Trade-Related Aspects of Intellectual Property Rights (TRIPS). **China subsequently announced that it had withdrawn this policy.** Given the unwritten nature of China's anti-suit injunction policy, the European Commission will continue to closely monitor the situation. The arbitration decision boosts the protection of European intellectual property rights internationally by ensuring that key trading partners, such as China, meet the commitments made under the TRIPS Agreement. It safeguards the protection of European innovators' rights in key technologies, such as 5G and wireless, which are major assets for the EU economy.

- In October 2025, in DS591 (Colombia – Anti-Dumping Duties on Frozen Fries from Belgium, Germany and the Netherlands), the EU won compliance proceedings in this dispute. As a result, **Colombia repealed the WTO-inconsistent duties** in March 2026.

In November 2025, the **EU terminated the dispute** DS610 (China – Measures Concerning Trade in Goods), given the key objectives behind the dispute had been met and the **relevant trade had resumed.**

In December 2025, the **EU** – following arbitration on the level of countermeasures – **received the WTO's authorisation to adopt countermeasures** in dispute DS577 (US – Ripe olives) concerning US measures on ripe olives from Spain.

[28] A list of members can be accessed here: Multi-Party Interim Appeal Arbitration Arrangement (MPIA).