Council of the European Union

Brussels, 6 November 2025
(OR. en)

15024/25

POLCOM 329

COVER NOTE

From:	Secretary-General of the European Commission, signed by Ms Martine DEPREZ, Director
date of receipt:	6 November 2025
To:	Ms Thérèse BLANCHET, Secretary-General of the Council of the European Union
Subject:	REPORT FROM THE COMMISSION TO THE EUROPEAN PARLIAMENT, THE COUNCIL, THE EUROPEAN ECONOMIC AND SOCIAL COMMITTEE AND THECOMMITTEE OF THE REGIONS on the Implementation and Enforcement of EU Trade Policy

EUROPEAN
COMMISSION

Brussels, 3.11.2025
COM(2025) 920 final

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 Policy

{SWD(2025) 940 final}

CONTENTS

I. Executive summary

In recent years, the global geopolitical paradigm has undergone a significant shift, resulting in changes in the implementation and enforcement of EU trade policy.

This fifth report on the implementation and enforcement of EU trade policy reflects concerted efforts to recalibrate and strengthen trade relations, build collaborative partnerships and navigate the complexities of an increasingly fragmented world, illustrating the cross-cutting role of trade in buttressing **competitiveness, security and sustainability.**

Trade agreements have helped to strengthen EU's competitiveness globally

In uncertain economic times, trade agreements have helped to boost EU companies' access to third country markets and EU exports in important sectors, as the following examples show:

- EU goods exports to **Canada** have increased by 51% since the provisional application of the Comprehensive Economic and Trade Agreement (CETA), which started in September 2017. This compares to a 20% increase in EU exports to the rest of the world over the same period. Agriculture, which saw exports increase by 40%, was the driver of this growth, with EU wine exports to Canada up 22% and cheese exports up 97%[1].

- EU exports to **Japan** since the entry into force of the EU-Japan Economic Partnership Agreement (EPA) in 2019 have grown by an estimated EUR 267 million. Sectors which have benefited include wine, drinks and processed agricultural products, animal products (except pigmeat), arable crops and plant-based products.

- EU businesses have seen increased trade worth some EUR 4 billion with **Andean countries, specifically Colombia, Peru and Ecuador,** as a direct result of the EU's free trade agreement (FTA) which provisionally entered into force in 2013 with Colombia and Peru and in 2017 with Ecuador.

Furthermore, the EU's more recent agreements supporting investment and promoting the use of EU rules and standards, thus ensuring a level-playing field, have had a positive effect on small and medium-sized enterprises (**SMEs) and their expansion outside the EU.** This has been essential for the EU's over **680 000 SMEs which engage in exports,** and which represent 95% of all exporting EU companies.

A recent ***ex post* evaluation study**[2] on **CETA** conducted for the Commission compared the percentage increase in the number of EU SMEs exporting to Canada in the years leading up to CETA (2012-2016) with the percentage increase during the first five years following its

---

[1] Source: *Ex post* evaluation of the EU-Canada CETA; draft final report published on 16 June 2025: Circabc.
[2] *Ex post* evaluation study by Trade Impact BV published on 16 June 2025; Circabc.

provisional application (2017-2022). It concluded that the number of EU SMEs exporting to Canada had grown by 20.3%, an increase that also trumped the increase in larger firms exporting (i.e. by 13.8%).

Trade agreements have also increased resilience and helped to diversify the EU economy

Pursuing EU trade policy objectives as part of an integrated set of EU policies also supports the wider transformation of **specific sectors**.

- Industrial sector/cars: once the Mercosur (politically concluded in December 2024) agreement enters into force, tariffs on car parts (currently at 14%) and cars (currently at 35%) will be progressively eliminated, while the risk of export restrictions affecting the supply of critical raw materials for EU battery production will be reduced.

- Digitally enabled trade in goods and services: the EU has included **digital trade chapters in its bilateral trade agreements** with **Japan** (complemented recently by a bilateral agreement on data flows)[3], the **UK, New Zealand**, and in its modernised agreements with **Chile** and **Mexico**. In addition to the bilateral agreements with e-commerce chapters, the EU has also concluded negotiations for digital trade agreements (DTA) with Singapore (July 2024) and the Republic of Korea (March 2025).

- Government procurement: the EU is party to trade agreements, including the World Trade Organization (WTO) Government Procurement Agreement (GPA), containing procurement commitments ensuring reciprocal access to **40 countries**[4] (GPA and/or FTA parties), giving it access to an estimated **EUR 1.8 trillion-worth of procurement**.

Economic security and supply chain security: trade agreements have supported diversification and secured the supply of inputs

Trade agreements have helped EU companies to **find new export markets while diversifying** supply sources and export destinations. In turn, this has enabled them to respond flexibly to global risks and reduce dependencies on specific markets.

[3] EU-Japan agreement on cross-border data flows

[4] Albania, Armenia, Australia, Bosnia and Herzegovina, Canada, Chile, Colombia, Costa Rica, Ecuador, El Salvador, Georgia, Guatemala, Honduras, Hong Kong, Iceland, Iraq, Israel, Japan, Kazakhstan, South Korea, Kosovo, Lichtenstein, Mexico, Moldova, Montenegro, Aruba, New Zealand, Nicaragua, North Macedonia, Norway, Panama, Peru, Serbia, Singapore, Switzerland, Taiwan, Ukraine, the UK, the US and Viet Nam.

The **total fall in EU exports of goods to Russia** of EUR 53.1 billion (2024 to 2019-2021 average) **was more than outweighed by** an over EUR 200 billion worth **increase in EU exports to EU FTA partners** over the same period.[5]

After trade sanctions were imposed on Russia, EU firms rapidly found new alternative markets, often in countries which already had a trade agreement with the EU.

- Reduced sales of **vehicles and vehicle parts** to Russia worth EUR 8 billion were offset by higher exports to the UK worth EUR 8.8 billion alone.

- Lower exports of **electrical machinery** worth EUR 7 billion were offset by higher exports (worth EUR 7.6 billion) to a range of countries including Switzerland, the UK, Mexico and Norway.

The EU's network of trade agreements in place reinforces the EU's ability to enhance its **strategic flexibility**, supporting the Union's long-term economic interests. The value of new trade agreements pending adoption or under negotiation has also come into sharper focus in view of recent developments, notably the US tariff measures. In this context, agreements like Mercosur, once in place, will make an important contribution to diversification, which is a core part of the EU's trade strategy. A successful bilateral agenda could also help to counter the knock-on effect of US tariffs, i.e. an increase in Chinese exports to other countries, and the subsequent erosion of EU market shares.

The EU's large network of trade agreements and partnerships has strengthened its geopolitical presence in a rapidly deteriorating international environment. In this context, it has contributed to **supply chain resilience** by helping the EU to secure critical inputs, such as energy and raw materials needed for the clean energy transition and other critical sectors of the EU economy, and to reduce the EU's over-dependence on individual markets, a vulnerability which could be used against it.

- EU trade agreements have helped the **EU to diversify** its energy and raw material supply **away from Russia**. For example, imports of gas and liquefied natural gas from Norway, Algeria and Kazakhstan have helped make up the supply shortfall generated by sanctions on Russian gas (supplementing imports from the US), while imports of copper from Chile and the Democratic Republic of the Congo filled the void left by the drop in imports of copper from Russia.

- EU trade agreements have also **helped to diversify supply**, with a greater number of products being traded with FTA partners compared to 'like' partners without an FTA. Recent research by the DG TRADE/Chief Economist team in cooperation with the Swedish National Board of Trade, looking at trends in EU trade with Canada, Japan, Viet Nam and Singapore between 2016 and 2023, confirmed that **EU trade agreements created a more diversified supply in their early years of**

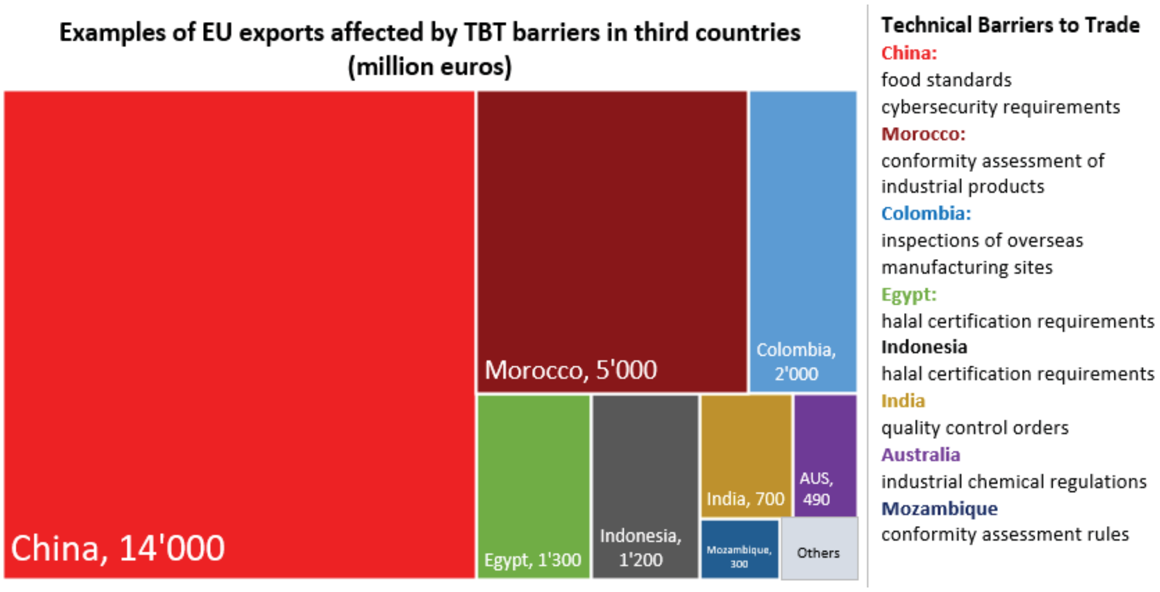
[5] This increases to approximately EUR 270 billion, if EEA and customs union partners are included.

implementation, in particular in the area of chemical products, one of the most important product categories. This observation reflects the EU's broader objectives of reducing supply chain vulnerabilities, developing partnerships with like-minded countries, and strengthening and deepening the EU's industrial capacity.

Effectively tackling trade barriers has enabled companies to compete on fair terms and ensured reciprocity

The Commission has continued its work within the **WTO and within trade agreement management structures** to **tackle behind-the-border barriers**, in particular technical barriers. The value of EU exports affected by technical barriers to trade (TBT) in third countries in 2024 was in the order of EUR 25 billion. As the graph below shows, EU exports most affected by TBT are exports to China (EUR 14 billion), followed by Morocco (EUR 5 billion) and Colombia (EUR 2 billion).

Figure 1: Examples of EU exports affected by TBT in third countries (2024)



TBT are often most acute with partners which either do not have an EU trade agreement or which have a relatively old agreement with the EU.

The strong institutional component of EU trade agreements has helped all parties to **prevent and remove trade barriers** as efficiently as possible, through regular contacts between trade and sectoral experts.

- Following bilateral engagement supported by the EU-Japan EPA, **Japan** revised its list of safe food additives in a way that protected the interests of EU exporters. In 2024, Japan confirmed that 33 additives widely used in the EU would remain on its list, emphasising the EU's reputation for providing high-quality and safe food products.

- Following bilateral engagement with **Serbia** under the Stabilisation and Association Agreement, in March 2025 Serbia lifted its ban – in place since April 2024 – on the import of wood pellets, which had cut around EUR 4 million in EU exports. Likewise, quantitative restrictions on imports of margarine and sunflower oil introduced in March 2024 were removed in March 2025 and quantitative restrictions on exports of metal scrap, introduced in January 2025, were removed in July 2025.

By contrast, where diplomatic engagement is unsuccessful, the Commission will resort to dispute settlement (five new cases were launched between June 2024 and June 2025) or **use autonomous measures** to defend its interests. In 2025, the Commission has started to use its powers under the **EU's International Procurement Instrument** (IPI) to tackle unfair practices limiting access to public contracts for EU suppliers, goods and services in trading partner countries:

- On 14 January 2025, after launching an investigation into the medical devices sector in China, the Commission published findings confirming that **China** had unfairly treated **EU medical device suppliers** in its public procurement of such devices.

- On 19 June 2025, the Commission decided to impose measures[6] on China, barring Chinese companies from bidding on public procurement contracts for medical devices in the EU exceeding EUR 5 million. In addition, successful bidders would not be allowed to source more than 50% of inputs for the purposes of such contracts from China.

Trade agreements have played a major part in promoting sustainability

EU trade agreements have continued to play a **major role** in **strengthening trade and sustainability**. 14 agreements concluded since 2012 (starting with the Republic of Korea) have provisions promoting international labour and environmental standards. The Commission has continued identifying country-specific priorities covering labour, gender, the environment, climate and civil society issues with the close involvement of EU domestic advisory groups (DAGs) set up under those agreements, bringing together business, trade unions and other stakeholder interests to assist the Commission in implementing its trade agreements.

In 2024, progress was made in Colombia, Guatemala and Moldova towards ratifying and implementing core international conventions on labour rights.

The Commission's **Single Entry Point**[7] has been assessing two additional formal complaints on trade and sustainable development (TSD), both concerning Viet Nam. One was received in March 2024 on its ratification of core International Labour Organization (ILO) conventions

[6] OJ L, 2024/2754, 29.10.2024, ELI: http://data.europa.eu/eli/reg_impl/2024/2754/oj.
[7] The Single Entry Point is the first point of contact for all EU stakeholders facing potential trade barriers in third countries, or non-compliance with sustainability rules related to trade and sustainable development or the Generalised Scheme of Preferences.

and the other one was received in February 2025, concerning human rights and labour rights violations.

Scope of the report

This is the fifth consolidated **annual report**[8] on the implementation and enforcement of trade commitments covered by preferential bilateral trade agreements[9] in place in 2024 and the WTO. It provides an overview of the EU's main activities and achievements in 2024, and the first seven months of 2025 led by the Commission's Chief Trade Enforcement Officer.

The **accompanying staff working document**[10] contains additional information on 41 of the EU's major preferential agreements. The **Commission's website**[11] contains supplementary information to this report on: (i) the evolution of EU trade with preferential partners in 2024; (ii) the use of tariff preferences on EU exports and imports from preferential trading partners, both for the EU and Member States; and (iii) data on the use of tariff rate quotas under certain trade agreements.

This report focuses on the implementation and enforcement of EU trade policy through the EU's network of preferential trade agreements and relationships. It also ties in with broader issues relating to economic security and enforcement in specific areas, which are only briefly touched on in this report, but are the subject of Commission reports in their own right. Those issues include:

- the use of **trade defence instruments** (anti-dumping, anti-subsidies and safeguards), covered by the Commission's annual trade defence report[12];

- monitoring and tackling counterfeiting, piracy and other infringements of **intellectual property rights** (IPR), covered by the Commission's biennial Third Country IPR Report[13] and Piracy Watchlist[14];

- the screening of foreign direct investments (FDI) and the control of dual use exports, which are the **EU's strategic trade and investment controls for security,** and which

---

[8] The fourth report was published on 3 October 2024 and is available here: Register of Commission Documents - COM(2024)385.
[9] For the purposes of this report, "preferential" refers to agreements that establish a free trade area or liberalise trade in services and are therefore exempted from GATT and GATS MFN.
[10] Commission Staff Working Document: Individual Information Sheets on the Implementation of EU Trade Agreements; SWD(2025) 940; Circabc.
[11] Commission/DG TRADE; implementation and enforcement page: Implementing and enforcing EU trade agreements - European Commission (europa.eu).
[12] 43rd Commission report on trade defence: Register of Commission Documents - COM(2025)428
[13] The most recent report on IPR protection and enforcement in third countries published on 22 May 2025 is available here: Register of Commission Documents - SWD(2025)131.
[14] The latest Counterfeit and Piracy Watchlist published on 22 May 2025 is available here: Register of Commission Documents - SWD(2025)132.

are covered by the Commission's annual reports on FDI screening[15] and on Regulation (EU) 2021/821 (the Export Control Regulation)[16];

- the application of the **EU General Scheme of Preferences** (GSP)[17], covered by the Commission's GSP reports.

In addition, separate annual reports are prepared on the application of the **Foreign Subsidies Regulation**[18] and the **International Procurement Instrument**[19].

II. Making the most of EU preferential trade agreements

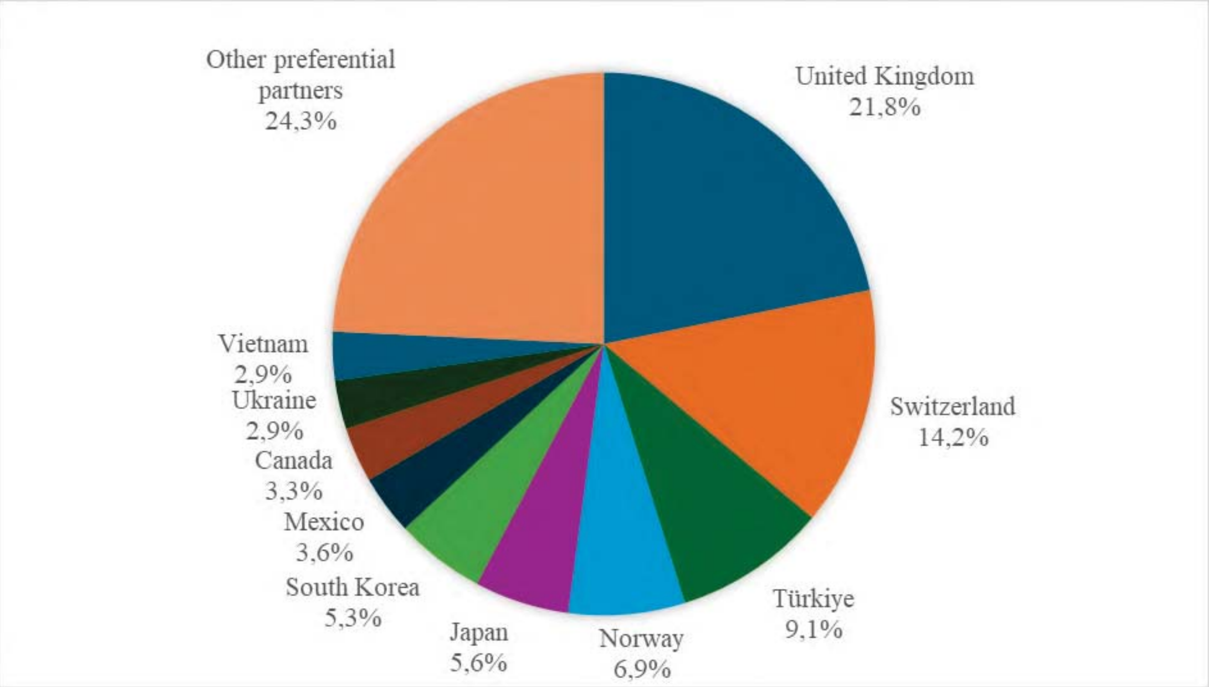
II.1 EU trade with preferential partners – main developments in 2024

2024 saw the entry into force of the EU-New Zealand FTA (1 May 2024) and the EPA with Kenya (1 July 2024), bringing the number of preferential trade agreements in place to 44[20] and representing 46.1%[21] of total EU external trade.

As Figure 2 below shows, the EU's largest preferential partners (i.e. those accounting for a share of total EU trade with preferential partners exceeding 5%) were the UK (21.8% of EU trade with preferential partners), followed by Switzerland (14.2%), Türkiye (9.1%), Norway (6.9%), Japan (5.6%) and South Korea (5.3%). Together, these six partners accounted for 63% of EU preferential trade in 2024.

[15] Fifth Annual Report on the screening of foreign direct investments into the Union and staff working document of 14 October 2025; Register of Commission Documents - COM(2025)632.
[16] See Report on the on the implementation of Regulation (EU) 2021/821 and Statistical update on dual-use export control of 30 January 2025; COM(2025) 19; Register of Commission Documents - COM(2025)19.
[17] The last report on the application of the GSP Regulation: JOIN(2023) 34; Register of Commission Documents - JOIN(2023)34 (europa.eu).
[18] See Article 52 of Regulation (EU) 2022/2560 (OJ L 330, 23.12.2022, p. 1). The first report is due in 2026.
[19] See Report under Article 13 of Regulation (EU) 2022/1031 of 30 July 2025; COM(2025) 430 final; eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:52025DC0430.
[20] A list of agreements can be found here: https://policy.trade.ec.europa.eu/eu-trade-relationships-country-and-region/negotiations-and-agreements_en.
[21] Adding agreements with Argentina, Brazil, Paraguay and Uruguay (Mercosur) and the EPAs with the East African and West African Communities that have been finalised and are now pending adoption (representing 3.4% of total EU trade), the share of EU preferential trade will rise to almost 50%.

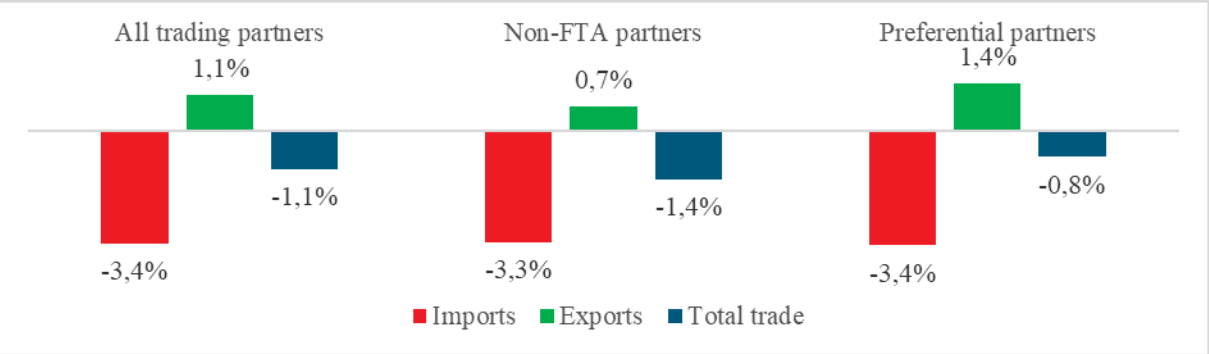
Figure 2: EU trade by preferential partner (2024)



Source: Eurostat Comext

As Figure 3 below shows, although EU trade with preferential partners in 2024 declined by 0.8%, a greater decline was registered in EU trade with all partners (-1.1%) and non-FTA partners (-1.4%). Over the same period, growth in EU exports to preferential partners rose by 1.4%, outstripping growth in exports to all partners (1.1%) and non-FTA partners (0.7%).

Figure 3: Annual growth in EU goods trade by type of partner (2023-2024)



Source: Eurostat Comext

Especially the more **modern trade agreements,** such as CETA, the EU-Japan EPA or the EU-Viet Nam FTA tend to facilitate market access for EU industry.

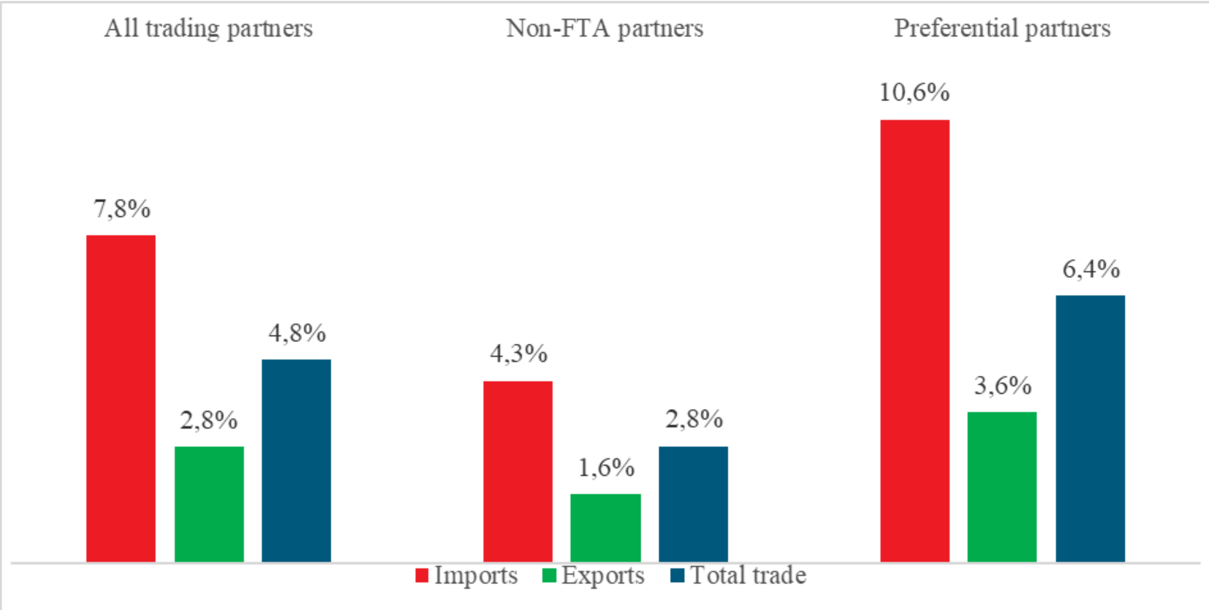
- For example, the **EU-Viet Nam FTA,** which entered into force in August 2020, is one of the most ambitious trade agreements the EU has concluded with a developing country. It has also progressively eliminated tariffs and reduced non-tariff barriers, providing better market access conditions for both sides. Over the past five years, EU exports to Viet Nam have accounted for two-thirds of the increase in EU exports to the Asean-4[22]. Exports of the most significant product category for the EU, i.e. Chapter 30 (pharmaceutical products), almost doubled from EUR 1.1 billion in 2019 to EUR 2.1 billion in 2024, accounting for 60% of EU exports of pharmaceuticals in both years[23].

- The number of successful EU bidders on the **Japanese** government procurement market has steadily increased since the entry into force of the EU-Japan EPA. In 2022 (latest data available), EU companies won public contracts in Japan worth EUR 317 million.

EU trade agreements have also helped the EU maintain its position as the number one exporter of agri-food products

EU **agri-food exports** to all partners hit a new record in 2024, reaching EUR 235 billion (+2.8% compared to 2023). In 2024, EU trade with preferential partners (imports and exports) increased by more (+6.4%) than EU trade with non-FTA partners (+2.8%).

Figure 4: Annual growth in EU agri-food trade by type of partner (2023-2024)



The **UK** was by far the number one destination for EU agri-food exports among preferential partners and overall, representing 23% of total EU exports.

EU agri-food exports to the **UK** rose by EUR 12 billion (+29%) between the entry into force of the EU-UK Trade and Cooperation Agreement in 2021 and 2024. Similarly, EU exports have increased by EUR 2.1 billion (+139%) to **Ukraine** since 2016, by EUR 1.6 billion (+51%) to **Canada** since 2017, and by EUR 1 billion (+15%) to **Japan** since 2019.

[22] ASEAN-4 refers to Indonesia, Malaysia, the Philippines and Thailand.
[23] Source: Eurostat (Comext).

Following a decrease in 2023, EU **agri-food imports** rebounded to 2022 levels, totalling almost EUR 172 billion in 2024. This recovery was primarily driven by higher import prices for cocoa, coffee, fruit and nuts. **Brazil** was the EU's top supplier, accounting for a 10% market share of total EU agri-food imports, followed by the **UK** (9%), which consolidated its position as the top source of EU agri-food imports among preferential partners. **Ukraine** was also a major supplier of the EU food chain (8%), with grain accounting for half of Ukrainian exports destined mainly for the EU animal feed market.

The EU's broad network of trade agreements has contributed to its generally strong agri-food trading performance. In particular, EU agri-food trade increased with **Canada**, **Japan** and **Viet Nam** following the implementation of corresponding trade agreements, with exports of products granted preferential access seeing significant increases due to the elimination or reduction of tariffs. A Commission study[24] published in November 2024 looking at the export performance of EU products granted preferential access under CETA found exports had grown by an average of 14% between 2019 and 2023, which was worth an additional EUR 400 million. This success could be partly attributed to the steady **removal of sanitary and phytosanitary (SPS) barriers** in partner countries (95 between 2020 and 2024) through close cooperation with Member States.

Exports of high-value EU products are safeguarded through the protection of **geographical indications** (GIs) under FTAs and other international agreements. As of 31 December 2024, a vast number of EU **geographical indications benefited from protection under bilateral agreements with more than 30 countries** which together account for some 60% of global GDP and 30% of the world's population.

New Zealand – advantages for protected EU GIs.

- Due to the protection of GIs required under the **EU-New Zealand FTA**, New Zealand must remove products from its market which are not genuine GIs. For the most common GIs (such as feta, port, and prosecco), transition periods of up to nine years have been allowed, and two names have been grandfathered.

- Protection of GIs under the EU-New Zealand FTA benefits EU producers by safeguarding their rights and eliminating unfair competition.

Overall, EU agri-food trade is highly diversified and involves many import and export partners. Nevertheless, trade dependencies remain for certain agri-food products[25]. In terms of imports, FTAs ensure stability in trade relations between the EU and its partners, boosting the EU's resilience. On 12 June 2025 the Council also adopted a regulation imposing new tariffs on the remaining agricultural products and certain fertilisers from Russia and Belarus that were not yet subject to extra customs duties. The aim is to reduce EU dependence on those imports as well as to reduce Russian export revenues, thereby limiting its ability to finance its war of aggression against Ukraine. The regulation entered into force on 1 July 2025.

[24] Study by the European Commission/DG AGRI published on 26 November 2024: Monitoring agri trade policy.
[25] 4th Report on the state of food security in the EU; EU Agricultural Economic briefs.

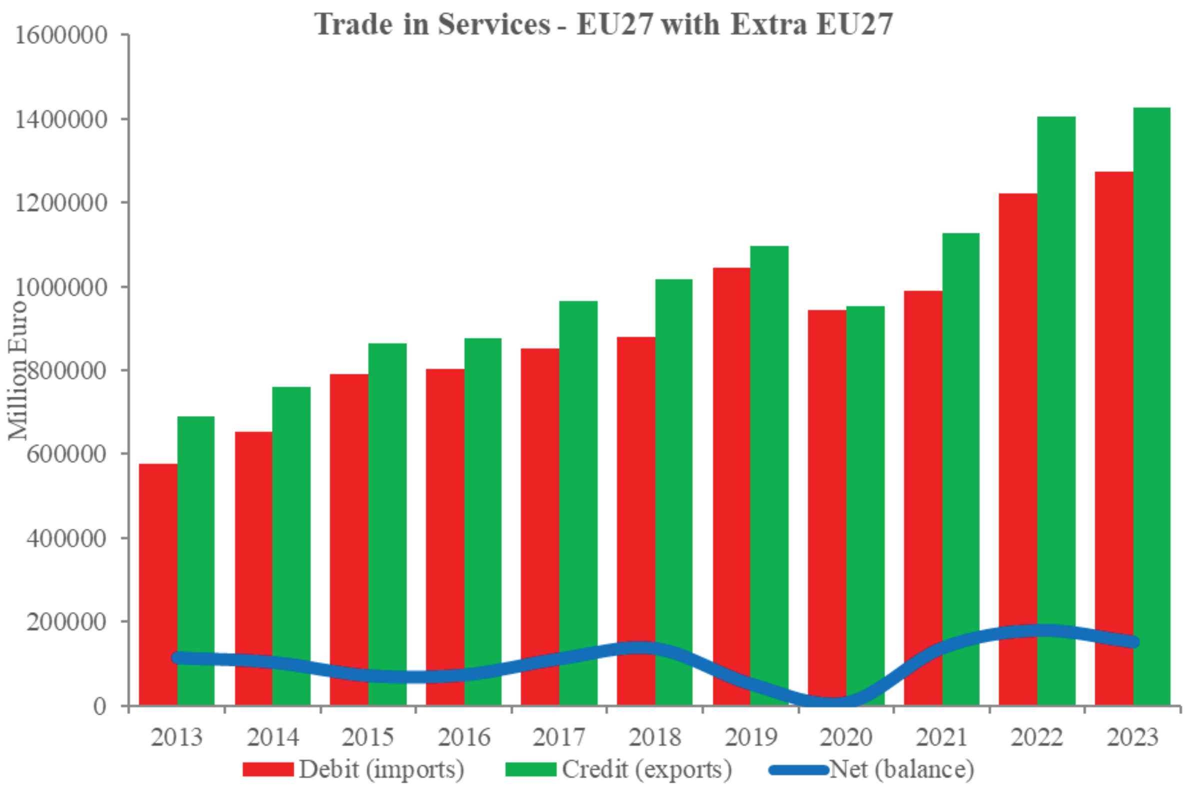
EU services trade with preferential partners increased more than with non-FTA partners

EU **trade in services (imports and exports) with preferential partners**[26] was worth EUR **1.3 trillion** in 2023 (latest figures available), representing almost half (**48%**) of total EU trade in services. In 2022-2023, EU trade in services with preferential partners **increased faster** than trade with non-FTA partners (+4.5% versus +1.2%).

The EU's **trade balance in services with preferential partners** showed a **surplus** of EUR 178.2 billion, while its trade balance with the rest of the world showed a deficit of EUR 25.4 billion. The EU's total trade balance in services reached EUR 152.8 billion in 2023, representing a decrease of 15.6% compared to 2022.

Following the recovery from the COVID-19 pandemic which saw **EU trade in services** (imports and exports) experience a sharp rise between 2021 and 2022 (+24.1%), growth slowed to a more normal level in 2023 (+2.8%). Meanwhile, the **EU exported** some EUR 1 427 billion in **services** in 2023 (+1.6% compared to 2022). The main export sectors were other business services (23.9%), telecommunications, computer, and information services (20.7%), transport services (17.2%), travel services (126%) and financial services (7.1%). The EU imported some EUR 1 274 billion in services (+4.1% compared to 2022).

Figure 5: Annual growth in EU trade in services (2022-2023)



[26] Preferential partners refer to the 76 countries with which the EU has a preferential trade agreement, whether or not the agreement also includes services.

The EU is a global leader in digitally delivered services, which in 2023 accounted for more than half (54%) of the EU's total external trade in services and corresponded to around EUR 3 trillion in imports and exports.

II.2 Implementing EU bilateral trade agreements

A. Implementing market access commitments

Preventing/removing barriers through FTA committees

Experience addressing potential trade barriers has consistently shown that the EU is most effective when it can identify and anticipate new legislative or regulatory barriers before they become law. It is also one of the reasons why in both the WTO and in the management structures for EU trade agreements so much emphasis is placed on transparency and early warning. Prevention is also crucial for SMEs which may have limited resources to follow potential developments in their export markets.

The most effective action has been collective, i.e. mobilising the resources of the Commission, EU delegations, Member States and businesses operating both in partner countries and in the EU. For example, coordinated action under the **EU-UK Trade and Cooperation Agreement** recently helped to prevent a potential barrier being introduced in the form of subsidies for offshore wind investments by way of the UK's Sustainable Industry Rewards with a budget of EUR 646 million. The EU successfully challenged this measure in 2022.

To build capacity, the Commission and Member States are continuing to explore practical ways of facilitating information flows between EU delegations and Member States' embassies in third countries.

Trade agreements have acted as a stepping stone to cooperation in areas of mutual interest

Dealing with different technical regulations across jurisdictions heavily influences the costs and complexities of doing business abroad. For this reason, the EU uses its trade agreements as a way of facilitating regulatory cooperation in areas of mutual interest, lowering costs by recognising each party's approaches and promoting coherence between them. Below are some examples of successful cooperation in 2024.

- Through regulatory exchange between the European Medicines Agency and Health Canada via the **EU-Canada Regulatory Cooperation Forum,** access to paediatric medicines could be improved. Discussions between the Canadian Hydrogen Association and Hydrogen Europe resulted in the signing in June 2024 of a **Memorandum of Understanding,** while discussions continue on the regulation of hydrogen energy, sustainable practices and artificial intelligence.

- Market access has also been facilitated through **mutual recognition agreements** (MRAs) on conformity assessments, ending the need for expensive double-testing. In 2024, a new EU conformity assessment body was accredited under the 1999 EU-US MRA[27] and two EU conformity assessment bodies had their accreditation renewed under the EU-Japan MRA.

B. Trade and sustainable development in focus

In 2024, the Commission continued to implement its review of trade and sustainable development (TSD) policy[28], recognising the role of TSD in trade policy.

For the 14 EU agreements which specifically include TSD, the Commission continued identifying **country-specific priorities** covering labour, gender, the environment, climate and civil society issues in **close cooperation with the EU domestic advisory groups (DAGs)** set up under those agreements. The three most recent agreements (**EU-Chile Interim Trade Agreement**, the **EU-Kenya Economic Partnership Agreement** and the **EU-New Zealand FTA**) also include binding provisions on gender equality, women's empowerment and labour rights.

In 2024, the Commission contracted an independent consultant to conduct an ***ex post* evaluation of the impact of EU FTAs on key environmental aspects, including climate**. The evaluation, published in February 2025[29], provides a qualitative analysis of the impact of environmental and climate provisions in seven EU trade agreements, based on a desk analysis and interviews with various stakeholders. It is accompanied by 20 case studies covering a total of 11 partner countries.

- The evaluation generally agreed that environmental provisions in FTAs had had a positive impact on the environment and climate in partner countries and, in particular, had not led to any backsliding on environmental or climate standards to encourage trade or attract investment.

- More specifically, the evaluation found that climate and environmental provisions in EU FTAs had generally achieved their objectives and were effective. They were also considered to be efficient since the benefits of achieving the objectives outweighed the costs for stakeholders.

- Finally, the evaluation concluded that the environmental provisions in EU FTAs were coherent and relevant.

[27] https://eur-lex.europa.eu/legal-content/EN/TXT/?uri=celex%3A21999A0204%2801%29
[28] For a summary of the main conclusions of the TSD review, see the 2022 annual report on implementation and enforcement: Register of Commission Documents - COM(2022)730 (europa.eu).
[29] https://circabc.europa.eu/ui/group/8a31feb6-d901-421f-a607-ebbdd7d59ca0/library/01b3ba3c-a300-45ca-b12c-d069db91ed7e/details?download=true

Another priority in 2024 was to monitor progress with the first **TSD complaint** filed by an NGO in May 2022 with the Commission's Single Entry Point concerning workers' rights in the mining sector in **Peru** and **Colombia**. Dialogue with these countries continued in 2024 to identify issues with the implementation of their respective labour laws. In the case of Colombia, discussions focused on progress with its domestic labour reforms. In terms of TSD cooperation with Peru, a list of technical cooperation activities was published in March and November 2024 on freedom of association, child labour, forced labour, combating informal work and, in particular, strengthening the labour inspection system. These activities are due to be implemented in the coming years with extensive support under EU programmes.

The positive outcomes of this work demonstrate the important role civil society plays in alerting and monitoring compliance with TSD policy in third countries.

In March 2024, a **second formal complaint concerning TSD policy** was filed with the Single Entry Point. It concerned the TSD chapter of the **EU-Viet Nam FTA**, in particular the commitment made by Viet Nam to '*make continued and sustained efforts towards ratifying the outstanding fundamental ILO conventions*'. The Commission's preliminary assessment noted the limited progress made by Viet Nam in relation to continued and sustained efforts towards ratifying ILO Convention 87. On 27 November 2024, Viet Nam adopted a new Trade Union Law. However, this new law does not make ratification of Convention 87 a condition or requirement, nor does it constitute ratification of Convention 87. On 21 March 2025, the Viet Namese Ministry of Home Affairs provided a written update on several labour-related issues of interest to the EU. The letter provided some recent insights and included Viet Nam's interpretation of its new Trade Union law, but it did not provide sufficient details about Viet Nam's past and planned efforts to assess whether it complies with the commitment under the EU-Viet Nam FTA to make continued and sustained efforts towards the ratification of ILO Convention 87. Further analysis is therefore needed, for which the Commission looks forward to receiving additional information from Viet Nam.

A third TSD complaint also regarding the EU-Viet Nam FTA was received in February 2025, concerning human rights and labour rights violations. The Commission is currently conducting its preliminary assessment of this complaint.

Under EU bilateral trade agreements containing TSD chapters, **Joint TSD Committees** are set up to discuss TSD issues.

Examples of tangible progress in 2024 on ratifying and implementing core conventions on labour rights and the environment, prompting partner countries to upgrade their respective domestic frameworks (in line with the provisions of their agreements with the EU), are presented below.

- **Colombia** ratified ILO Convention C156 (the Workers with Family Responsibilities Convention) on 6 December 2024. **Guatemala** ratified ILO Convention C191 (the Safe and Healthy Working Environment Convention) on 6 August 2024. **Moldova** ratified ILO Convention C190 (the Violence and Harassment Convention) on 19 March 2024.

- **Moldova** also made progress **on upgrading** its **domestic arrangements** relating to **labour and the environment.** It adopted a law on climate change, which lays down a legal framework for achieving net-zero emissions by 2050. Furthermore, Moldova's Low Emission Development Programme 2030 was launched in 2024 and the country also published eco-design requirements for 21 energy-related products. Concerning labour inspections, Moldova reported on legislative amendments allowing unannounced inspections to help detect and regularise undeclared work. Progress in this area was also made by **Georgia,** who further bolstered its labour inspection system through additional recruitment, training and capacity building. The country also adopted its National Climate Change Strategy 2030.

As in previous years, the Commission used **TSD Committees** set up under EU trade agreements to engage with partners on key elements of the TSD policy review and **enhance cooperation on environmental and climate matters, as well as on gender issues.** Work was notably carried out through dedicated policy dialogue and green partnerships. Examples of progress made in 2024 are presented below.

- The **EU and the Republic of Korea** deepened their cooperation under the **Green Partnership** launched in May 2023 on trade-related issues such as offshore wind, decarbonisation of the shipping industry, the circular economy and the Carbon Border Adjustment Mechanism (CBAM).

- The **EU and Japan** stepped up their cooperation under the **Green Alliance** on issues such as carbon pricing, offshore wind power and carbon capture and utilisation.

- The EU and **Singapore** strengthened their cooperation on technologies to support the green transition.

- A dialogue was started between the EU and **Central America** and between the EU and **Peru, Colombia and Ecuador** to strengthen the implementation of the sustainability component of their respective trade agreements.

- Discussions took place between the **EU and Canada** on the implementation of the **CETA Trade and Gender Recommendation**[30]. Events were held to share information on policies, laws and best practices on a range of issues. On 19 March 2024, a workshop on trade, gender and SMEs was organised as part of the 2024 Civil Society Forum, and in April 2024 an event was held in Toronto on supporting women in international trade.

The structures set up under the TSD chapters were also key forums for the EU's partners to **deepen their understanding of recently proposed or enacted EU legislation** on sustainability, some of which had been a major source of concern for different partners. For example, in preparation for the latest TSD Committee with New Zealand, the Commission

[30] CETA Trade and Gender Recommendation: EU-Canada Work Plan 2020-2021

organised meetings on deforestation between experts on sustainable forest management from the EU and New Zealand.

The EU has continued to fund technical cooperation supporting sustainability objectives

In order to make progress on implementing and enforcing the sustainable development aspects of EU trade agreements, the Commission has generally relied on offering incentives to its partners, alongside having a dispute settlement option available to it. In 2024, the EU continued to implement cooperation projects in **Central America**[31] and **South-East Asia,** including through phase 2 of the 'Trade for decent work' project (EUR 4 million for the period 2024-2027), aimed at improving the implementation of labour standards, in particular in Bangladesh, Mongolia, the Philippines and Viet Nam. Through the 'Responsible business conduct for green, digital and resilient supply chains in Asia' initiative, the EU continued to support the work of the OECD and its partners in the region by raising awareness of, and supporting capacity building to, implement internationally agreed standards for responsible business conduct.

Working with Domestic Advisory Groups (DAGs)

An **EU project** to support the implementation of civil society mechanisms under trade agreements – contracted by the Commission in 2018 **with a budget of EUR 3 million** – was concluded at the end of 2024. Thanks to input from the DAGs, a **new financial facility** is being set up to support the functioning of DAGs, with the possibility of supporting them in several FTA partner countries, including Andean and Central American countries. The new support facility (with a budget of **EUR 1.5 million** for two years, renewable once) will finance the work of DAGs in the EU and in developing partner countries. The scope of the new contract for this project has been adjusted to take on board the needs of DAG members, such as additional expert input, note-taking during meetings and secretarial support for DAGs in partner countries to help them organise meetings.

Contributions by both European and partner-country DAGs, who **monitor the situation** on the ground in partner countries, inform the Commission's position in ensuring implementation of TSD commitments. Below are some examples.

Examples of input from DAGs.

- Issues raised by EU civil society organisations in Vietnam related to **human rights violations** against some environmental activists or trade union representatives support the EU's discussions with Vietnam on the matter.

- Information supplied by the **EU-Canada DAG** helped both sides to boost the EU-Canada joint **workplan** on TSD.

[31] https://www.euroclima.org/en/mapas-2021-en

- Examples supplied by the **EU-Japan DAG** shed light on a large-scale advertising campaign in Japan which was being investigated by the Advertising Review Organisation for alleged greenwashing. This fed into the discussions on the merits of a regulated approach in this area, as is already the case in the EU.

- Against a backdrop of political uncertainty and democratic decline in Georgia, civil society organisations raised concerns over the compatibility of **Georgia's draft bill** on family values and the protection of minors with ILO conventions 111 (Discrimination/Employment and Occupation) and 190 (Violence and Harassment) and asked for the bill to be withdrawn.

III. Helping SMEs find their place in global trade

Throughout 2024, the Commission maintained its strong commitment to helping EU businesses, in particular SMEs, make the most of EU trade agreements.

A. Upgrading and promoting the Access2Markets platform

The **Access2Markets platform** has attracted 12 million visitors since its launch in 2020. In 2024, it received more than three million visitors, the most of any year so far. At the same time, the Commission has trained 14 000 stakeholders to use the platform, enabling them to benefit from free, multilingual information. The Access2Markets platform has been regularly upgraded to make it even more streamlined, user-friendly and helpful for European SMEs looking to expand internationally. It now also includes new services statistics.

- **The Rules of Origin Self-Assessment tool** (ROSA) is a valuable resource enabling companies to assess whether their products meet the conditions to benefit from preferential treatment under an EU trade agreement. Major improvements were made to the tool in 2024 to make it available in all EU languages and to extend its coverage to include the FTA with New Zealand. The tool now covers 32 agreements and the conditions under the Generalised Scheme of Preferences.

- **My Trade Assistant for Services and Investment** is an online tool launched in 2022 which provides practical information about the requirements that EU service providers must fulfil when exporting outside the EU. On average, it is consulted 2 000 times per month. An extension made to the tool in 2024 means that it now covers more than 100 services sectors, including business and professional services, financial services, telecom services, and transport services in eight countries: Canada, China, Hong Kong SAR, Japan, Norway, Switzerland, the UK, and the US. In 2025, information for Brazil, India, Mexico, and South Africa was uploaded to My Trade Assistant for Services and Investment.

- **My Trade Assistant for Procurement** helps EU businesses establish whether a specific public procurement tender is covered by one of the EU's bilateral trade agreements. The tool covers the US, Canada, Japan, the UK and, since 2025, Switzerland, Norway, Iceland, Liechtenstein, Albania, Bosnia and Herzegovina, Serbia, North Macedonia, Kosovo and Montenegro.

- **Access2Conformity**, which was added to the Access2Markets platform in 2023, helps EU exporters identify where in the EU they can have their products conformity-tested and certified when exporting to third countries that have an MRA with the EU. The tool currently covers Australia, Canada, Japan, New Zealand, the US and Switzerland.

- **Procurement4Buyers** was added to the Access2Markets platform in June 2024. The tool helps contracting authorities in the EU to understand which of their tenders should be opened up on a non-discriminatory basis to bidders, goods and services from certain third countries. This helps to guarantee the transparency of the EU's procurement commitments with respect to third countries.

B. Helping SMEs make the most of international trade agreements

International trade offers a variety of benefits for the economy, businesses and consumers. Data from 2023 showed that while around 95% of companies exporting from the EU were SMEs, the value of their exports accounted for only 30% of total exports. In 2024, the Commission again stepped up its efforts to help SMEs have more of an international reach.

Enterprise Europe Network

The Enterprise Europe Network[32] (EEN) supports SMEs with international ambitions, including start-ups and scale-ups. It offers business partnering services, market entry and import/export support, and regulatory guidance.

To this end, the EEN has cooperated closely with contact points established in international markets of significant interest to EU SMEs, including Japan, South Korea, Singapore, Viet Nam, India, Canada, Chile, the UK, and the US.

On 30 September 2024, an open invitation was published[33] to strengthen the EEN and expand it to include additional strategic third countries. The goal of the open invitation was to add new business support organisations to the EEN, known as 'international network partners', and to leverage their experience on the ground.

In December 2024, the EEN addressed an online survey to its advisers providing internationalisation services for local businesses. The main findings of the survey were as follows.

[32] https://een.ec.europa.eu/
[33] https://een.ec.europa.eu/news/open-invitation-join-enterprise-europe-network-international-network-partner

- Around **one third** of EEN advisers had clients asking for support on how to benefit from reduced tariffs and regulatory alignment linked to **EU trade agreements**.
- Around 45% of EEN advisers regularly provided support in connection with EU trade agreements. Over one third of EEN advisers referred clients to more specialised service providers.
- Over **40% of EEN advisers** had already made achievements and/or brought about **success stories** relating to the trade services they provided for their clients.
- Over two thirds of EEN advisers regularly (or at least occasionally) used the EU's Access2Markets platform.

In 2024, the EEN supported and hosted webinars promoting EU trade agreements streamed on YouTube[34], including webinars on:

- Testing and certifying for export – the benefits of mutual recognition agreements (MRAs) on conformity assessment content;

- Doing business in New Zealand: how to implement the EU-New Zealand trade agreement.

- Doing business in Viet Nam: exploring opportunities in the local agri-food sector.

Concrete results of the work done by EEN business advisers and examples of how they have helped EU SMEs to seize trade opportunities can be found on the EEN website[35].

Market Access Days

The Commission, in cooperation with Member States, has continued to organise Market Access Days. These events, held in various EU countries, have helped to increase awareness among businesses at national and local level of the benefits of EU trade agreements. In 2024, Market Access Days were held in France, Austria, Germany, Belgium, the Netherlands and Hungary. The Chief Trade Enforcement Officer participated in these events which brought together nearly 700 stakeholders to discuss the specific challenges of accessing third-country markets and the competitive advantages of trade agreements.

Study of the EU SME internationalisation strategy

On 3 February 2025, the Commission published[36] a study of the EU SME internationalisation strategy. The study mapped and analysed existing national and EU support measures, identified gaps, overlaps and potential improvements. It offered recommendations for making more efficient use of existing national and EU resources. The outcomes of the study were

[34] https://www.youtube.com/playlist?list=PLq0qsbVGoO6EO_q6ho_ip0x9IgDTRRAJd
[35] https://een.ec.europa.eu/success-stories
[36] https://single-market-economy.ec.europa.eu/publications/study-european-union-smes-internationalisation-strategy_en

presented at a workshop[37] on 7 February 2025. The Commission is working on implementing the study's key recommendations.

Implementation of SME chapters in EU trade agreements

EU-Canada Comprehensive Economic and Trade Agreement (CETA). In December 2024, following regular discussions between their respective SME Contact Points, the EU and Canada agreed on a three-year action plan[38] (2025-2027) to implement the CETA recommendation on SMEs.

EU-Japan Economic Partnership Agreement (EPA). On 20 September 2024, the EU and Japanese SME Contact Points held their fourth meeting under the EPA, which was followed up by a separate meeting on 11 November 2024 in Brussels. Both sides reported on their latest initiatives to implement the information-sharing provisions under the EPA and on other activities to encourage more SMEs to take advantage of the EPA. The joint activity report of the SME Contact Points is available online[39]. In addition, the EU-Japan Centre for Industrial Cooperation[40] continued to play a key role in supporting SMEs. Examples of EU SMEs successfully entering the Japanese market are available online[41].

EU-New Zealand FTA. Following the entry into force of the EU-New Zealand FTA on 1 May 2024, the EU and New Zealand SME Contact Points held their first meeting on 11 December 2024. They discussed progress on implementing the information-sharing commitments under the SME chapter, topics of interest for future meetings and how to structure future work.

World Trade Organization (WTO)

In 2024, the EU contributed to the development of the Global Trade Helpdesk[42], an initiative jointly led by the WTO, the International Trade Centre and the UN Conference on Trade and Development to simplify market research by bringing together trade and business information in a single online portal. The EU participated in the 13th Ministerial Conference of the WTO which took place between 26 February and 2 March 2024 in Abu Dhabi. At that conference, two documents entitled *Access to finance for women-led micro, small and medium-sized enterprises ('MSMEs'): a compendium of financial inclusion initiatives*[43] and *A compendium of special provisions for MSMEs in Authorized Economic Operator (AEO) Programs*[44], were published, with significant contributions from the EU.

[37] https://single-market-economy.ec.europa.eu/news/hybrid-workshop-sme-internationalisation-2025-02-10_en
[38] https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/8c22233e-aa1c-4d70-9f0e-abcd021fc1f7/details
[39] https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/619f8187-79fe-4141-9756-ca58c042333d/details
[40] https://www.eu-japan.eu/
[41] https://www.eu-japan.eu/eubusinessinjapan/procedures/import-export/case-studies-and-success-stories
[42] https://globaltradehelpdesk.org/en
[43] directdoc.aspx (wto.org)
[44] INFMSMEW47R1.pdf

In the course of 2024, the EU also took part in the four meetings of the WTO Informal Working Group on MSMEs[45] – composed of 103 countries – at which it presented to WTO members the EEN, the TRACES online platform for animal and plant health certification, and action taken to implement the December 2020 MSME Package.

IV. Addressing barriers and finding solutions

IV.1 State of play and trends in 2024

In 2024, a mix of ongoing geopolitical tensions, economic fluctuations and shifts in trade policies increasingly shaped the global trade landscape. Countries and trade blocs grappled with finding a balance between protecting domestic industries and ensuring a free and fair trading system is in place.

Import restrictions, local content requirements, discriminatory practices and, more generally, measures directed at import substitution (e.g. non-automatic licences for a variety of imports), in particular in the Southern Neighbourhood[46] but also in Asia, became the industrial policy of choice for some of the EU's trading partners.

EU businesses continued to face export restrictive measures targeting (critical) raw materials to create policy space for industrial development and processing, taken in particular by partner countries in South-East Asia (e.g. Indonesia's export ban on nickel ore), the Far East (e.g. China's restrictions on rare earth exports), or Sub-Saharan Africa (e.g. Ghana and Tanzania or, more recently, export bans on lithium imposed by Namibia and Zimbabwe), but also the US move to restrict export access to advanced semiconductors for over 120 countries, including some EU Member States.

The importance of **addressing and navigating trade barriers and protectionist measures** again came to the fore and was a continued cause for concern as a total of **23 new barriers were registered.** The majority were sanitary and phytosanitary measures (nine new barriers), followed by technical barriers to trade (five new barriers) and barriers to service provision (four new barriers).

A. Inventory of registered trade and investment barriers as of 31 December 2024

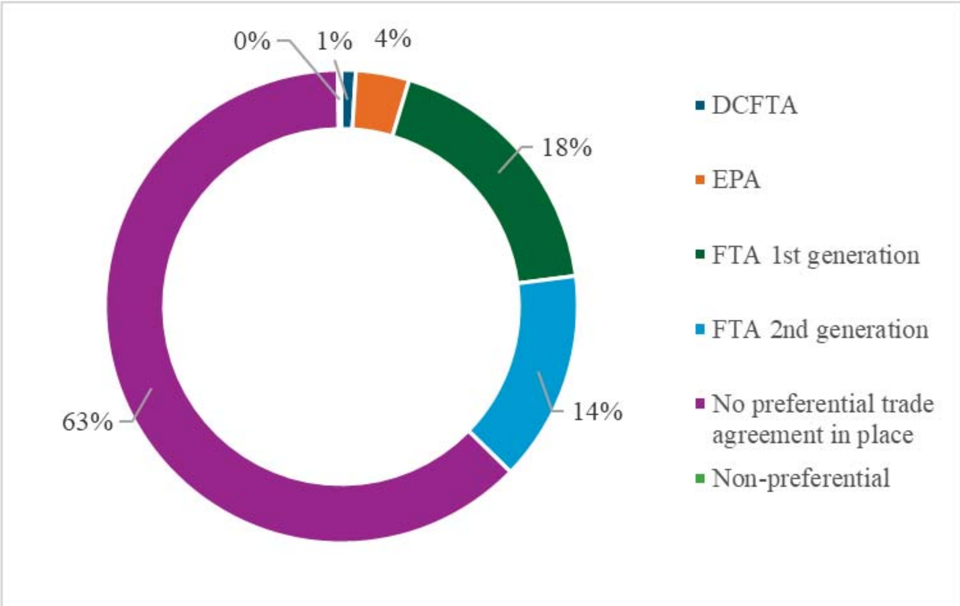
A total of **410 market access barriers across 67 third countries** were recorded in the Commission's Access2Markets database as at the end of 2024. This represented a decrease of 13 compared to the 423 barriers registered at the end of 2023. The reduction reflected – as in previous years – the implementation of a two-pronged strategy: first, proactively working

[45] https://www.wto.org/english/tratop_e/msmes_e/msmes_e.htm
[46] The Southern Neighbourhood comprises 10 partner countries (Algeria, Egypt, Israel, Jordan, Lebanon, Libya, Morocco, Palestine, Syria and Tunisia) which enjoy cooperation with the EU as part of the European Neighbourhood Policy (ENP).

with partner countries to eliminate trade barriers affecting EU exporters and, second, conducting regular internal reviews to remove outdated entries that no longer represent actual market access challenges.

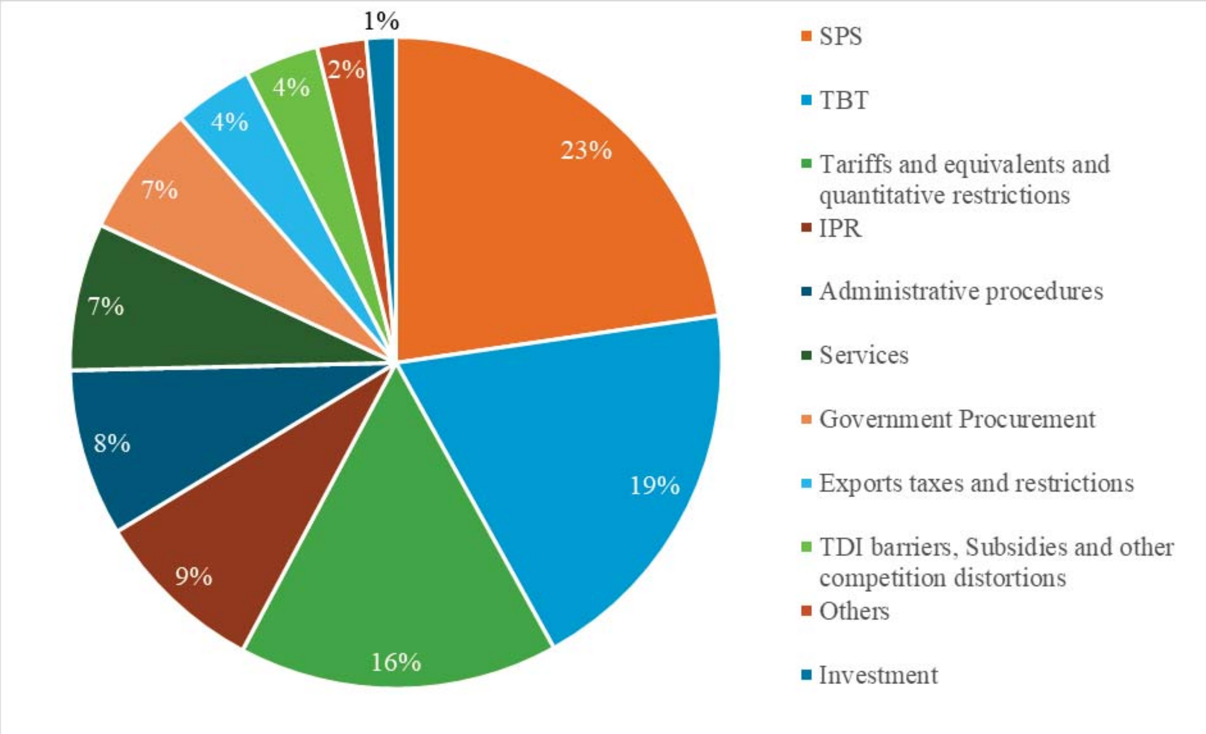
In terms of **geographical distribution**, the highest numbers of market access barriers in 2024 were registered in **Russia (32), India (31) and China (30),** followed by the US (24), Brazil and Indonesia (18 each). This overall pattern is broadly consistent with 2023, although the order of the top three countries changed, with Russia and India overtaking China. Brazil and Indonesia again had the same number of barriers. Other third countries with 10 or more barriers included South Korea (17), Türkiye (14), Malaysia, Australia and Algeria (11 each), and Mexico, Thailand and Morocco (10 each). As Figure 6 below shows, 63% of barriers to trade were imposed by non-preferential trading partners.

Figure 6: **Distribution of barriers per type of agreement**



As Figure 7 below shows, **sanitary and phytosanitary (SPS) measures** represented the **largest category** of barriers in 2024, accounting for 93 barriers or 23% of all registered barriers, the same as in 2024. Technical barriers to trade (TBT) were the second-largest category, with 79 barriers, while tariffs, tariff equivalents and quantitative restrictions accounted for 65 barriers. The top three categories combined made up 58% of all active trade barriers as at the end of 2024.

Figure 7: Types of barriers registered as at the end of 2024



In terms of trends, 2024 saw a sharp decline in two specific categories: **tariffs and quantitative restrictions, which saw the number of barriers fall from 70 to 65, and export taxes and restrictions, which saw barriers fall from 20 to 16**. **SPS measures** also continued their **downward trajectory**, registering a cumulative reduction of nearly 15% since 2020, consolidating a five-year trend. Similarly, tariffs and quantitative restrictions, and administrative procedures, both decreased by 17% over the same period. Government procurement-related barriers registered a decrease of 4% compared to 2020.

The number of barriers in all other categories remained broadly stable compared to figures from the end of 2020.

B. Trends in the number of trade and investment barriers over the period 2020-2024

In 2024, the **number of newly registered barriers increased further compared to 2023,** while remaining well below pre-COVID levels. A total of 23 new barriers were recorded in 2024, up from 16 in 2023.

Category	2020	2021	2022	2023	2024
SPS	13	2	3	3	9
TBT	5	6	2	3	5
Tariffs and equivalents and quantitative restrictions	5	2	3	4	2

Administrative procedures	5	1	0	4	2
Services & investment	4	1	0	0	4
Other measures[55]	4	2	0	0	0
IPR	1	0	2	0	1
Public procurement	3	2	0	0	0
Export taxes and restrictions	1	0	0	2	0
Grand total	**41**	**16**	**10**	**16**	**23**

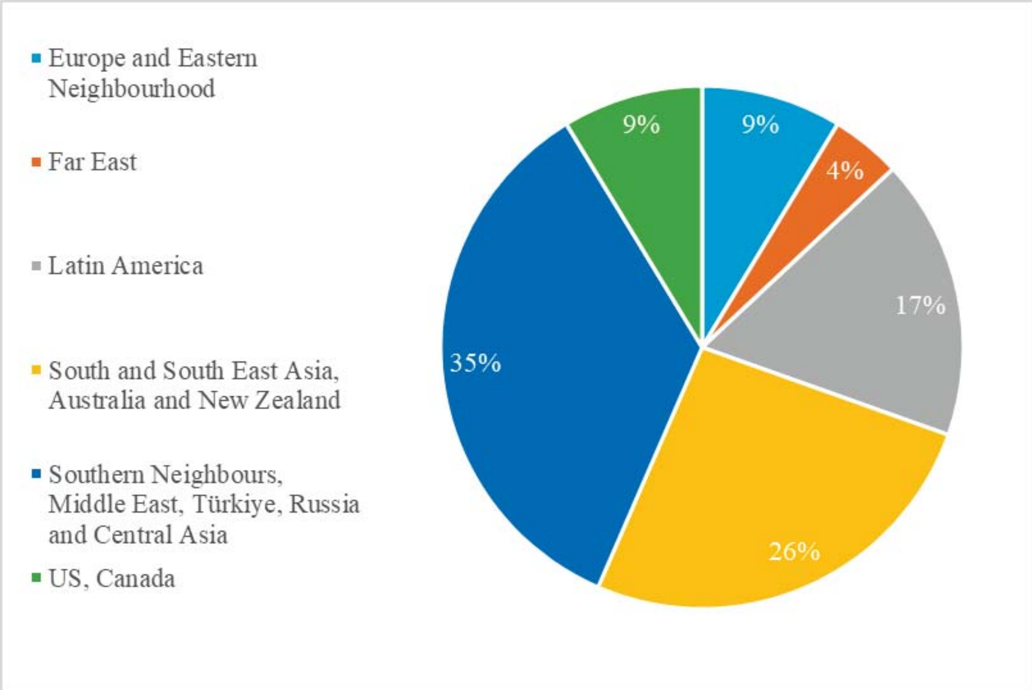
The largest increase came from **SPS** measures, where nine new barriers were registered**,** more than in any of the three previous years. TBT also rose to five newly registered barriers, compared with three in 2023. By contrast, tariffs**, tariff equivalents and quantitative restrictions**, decreased to two from four in 2023. Four new barriers were registered in the category of **services and investment** after none were recorded in the two previous years.

In 2024, as the table below shows, **agriculture and fisheries remained the most affected sector** with 10 new barriers, more than double the number recorded in 2023. Services also saw an increase with four new measures, up from one the year before. New barriers were also recorded in previously unaffected industries such as cosmetics, electronics, wood/paper, textiles/leather, and ceramics/glass. By contrast, horizontal measures fell to zero.

Type of sector	New barriers 2022	New barriers 2023	New barriers 2024
Agriculture & Fisheries	5	4	10
Horizontal	3	5	0
Wines and spirits	1	1	1
Other industries	1	1	0
Automotive	0	2	0
Pharmaceuticals	0	2	2
Mining	0	1	0
Services	0	1	4
Ceramics and glass	0	0	1
Cosmetics	0	0	2
Electronics	0	0	1
Wood, paper and pulp	0	0	1
Textiles and leather	0	0	1
Total	**10**	**16**	**23**

Figure 8 below shows the geographical spread of new trade barriers in 2024. The **Southern Neighbourhood** again registered the highest number of new trade barriers, with eight barriers. This was closely followed by South and South-East Asia, Australia and New Zealand, which registered six new barriers.

Figure 8: Geographical spread of new trade barriers in 2024



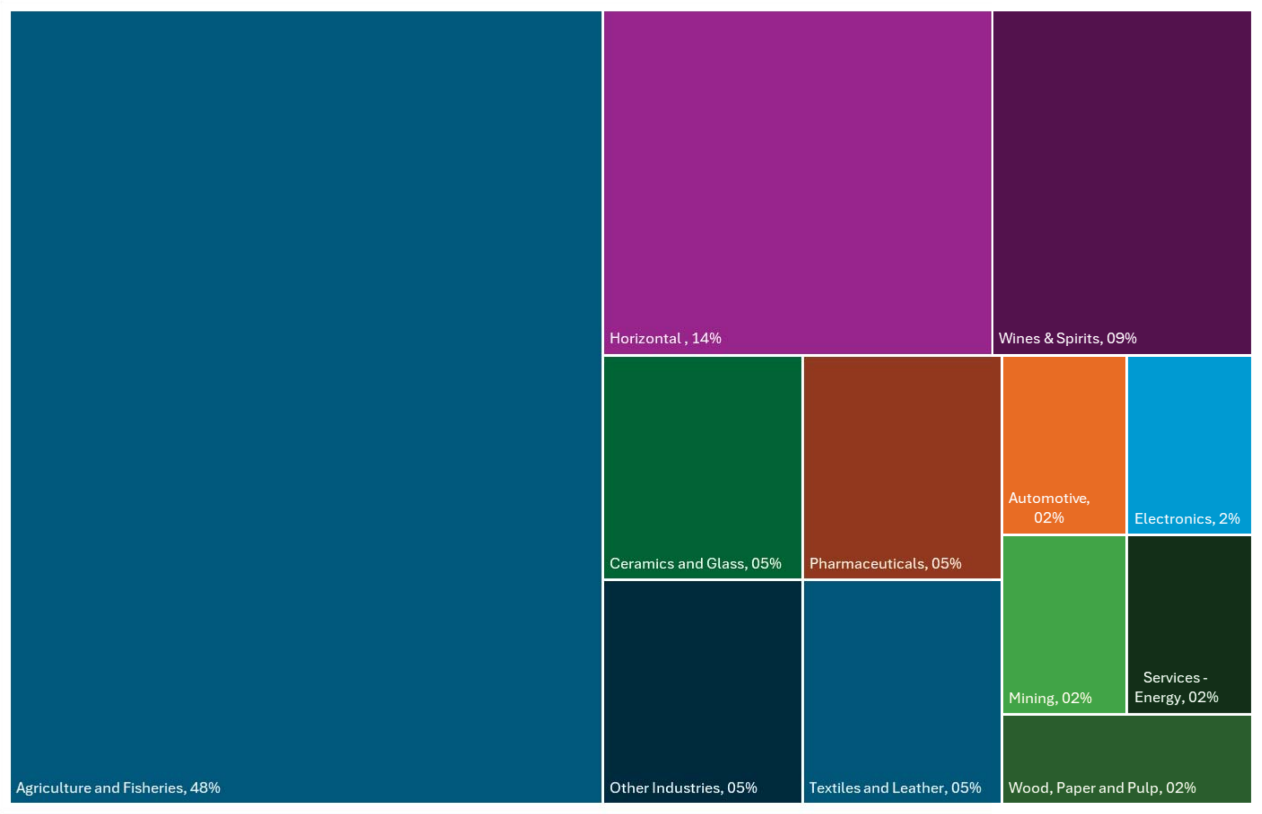
C. Barriers removed in 2024

In 2024, progress was made in tackling trade barriers, with **44 barriers fully or partially removed in 27 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.

In all cases, the Commission cooperated closely with Member States and EU stakeholders through the **Market Access Partnership,** under which monthly meetings are held of the Market Access Advisory Committee which brings together the Commission, Member States and EU business associations. The EU's delegations in partner countries played a key role in tackling trade barriers, leveraging their expertise on the ground and facilitating direct access to partner countries' authorities. The Council's Trade Policy Committee also regularly discussed implementation and enforcement issues, including in relation to country-specific barriers.

Most tackled barriers (48%) related to **the agriculture and fisheries sector.** Additionally, 14% of cases addressed cross-sectoral issues, affecting products from more than one industry.

Figure 9: Number of barriers tackled per sector (2024)



Once again, the majority of barriers removed concerned SPS measures, with 21 barriers removed in 2024 and similar successes during the first seven months of 2025. The prevention and full or partial removal of such barriers, achieved in close cooperation with Member States trade counsellors and relevant industry associations, had a direct positive impact on the **European food sector,** as the following examples show.

- **Saudi Arabia** lifted its **ban on EU beef**. In turn, EU exports of beef, sheep and goat meat to Saudi Arabia were valued at some EUR 10 million in 2024 (with beef accounting for the majority) and are expected to rise in future.

- After suspending **beef and pork imports** from Germany for three months, **Singapore** recognised Germany as a 'foot and mouth disease-free zone without vaccination' in April 2025 and allowed exports to resume. Germany is currently one of Singapore's main pork suppliers, with exports valued at EUR 25 million in 2024. Singapore also approved exports of pork and pork products from Portugal under pre-listing conditions. An initial consignment of 25 tonnes of pigmeat was exported from Portugal to Singapore in February 2025.

- The **US** recognised Italy as officially free of swine vesicular disease. As a result, it has lifted trade restrictions on **pork and pork products** originating from Tuscany and Umbria. The removal of these restrictions will have a significant positive impact on Italian exports to the US of certain speciality products, in particular high value protected products such as the Protected Geographical Indication (PGI) 'Finocchiona' and the PGI 'Prosciutto di Norcia'. Exports to the US account for 13.5% of certified 'Finocchiona' production and 15% of 'Prosciutto di Norcia' production.

- The **US also reopened its market** to imports of **sheep and goat meat** products. This is expected to have a positive impact on EU exporters, particularly from Spain, with exports estimated to reach 750 tonnes by 2027, up from 120 tonnes in 2025, corresponding to a value of around EUR 13 million per year.

Five of the barriers lifted in 2024 were **TBT**, while a further seven concerned **tariffs, tariff equivalents or quantitative restrictions.** The removal of these barriers helped reduce costs and improve market access for EU exporters. Below are some examples of the barriers removed.

- **Paraguay** eliminated a fee for legalising export documents at its consulates (costing EU importers EUR 22 million per year), thereby removing a major bone of contention from EU-Paraguay trade relations.

- In 2021, **the Dominican Republic** following action taken by the EU delegation, Member States and other affected countries decided to exempt importers of alcoholic beverages from its fiscal control and traceability system (TRAFICO). This system requires individual labelling of each individual unit of product (e.g. bottles, cans etc.), and had significantly raised the cost of imported products compared to local products. EU importers are now saving around EUR 6.5 million per year.

- In 2025, the **Dominican Republic** also ended discrimination against imports of cheeses, cooked hams and canned vegetables from the EU which, unlike their domestic equivalents, were subject to a 18% VAT. Following discussions held bilaterally and within the WTO Market Access Committee, the Dominican Republican authorities ended the discrimination by extending VAT to domestic products (other than for certain types of canned vegetables and turkey ham). This is set to benefit EU exports of cheeses and hams to the Dominican Republic, which in 2024 were worth around EUR 50 million.

- The **Peruvian** fisheries authority amended its rules on accommodating the cross-border provision of services and in November 2024 officially recognised an EU laboratory to work in Peru as a testing entity for the issuing of SPS certificates for exports of food and feed. This means that the EU laboratory will no longer face procedural hurdles, such as on-site inspections and overly strict working conditions for its staff. This breakthrough followed many years of negotiations to address regulatory barriers under the EU's trade agreement with Peru.

- **Indonesia** lifted its ban on imports of textiles and textile products (e.g. carpets and rugs) by EU companies. Before the ban was lifted, EU textile companies could only import semi-finished materials or unfinished products if asked to do so by SMEs registered with the Indonesian Ministry of Industry.

- **Saudi Arabia** further facilitated market access for EU ceramic tiles in 2024 and 2025 by making audits less burdensome. Following numerous attempts to resolve the issue within WTO TBT meetings and in bilateral meetings, including through a letter from the Commission's Chief Trade Enforcement Officer in September 2024, Saudi Arabia finally provided a written guarantee that its audit bodies would comply with a limit on audit costs for EU exporters. Since redundant testing and product audits were stopped following an investigation under the Trade Barrier Regulation, EU exports of ceramic tiles to Saudi Arabia have seen steady growth, increasing in value from EUR 385 million in 2021 to EUR 502 million in 2024. Overall, ceramic tiles represent 30% of all EU exports to Saudi Arabia.

- In January 2024, following consistent calls from the OECD and the EU, **Brazil** reformed its rules on 'transfer pricing', i.e. the price that branches of the same corporation charge each other for goods and services provided across borders. Such transactions must now be billed at the market rate, according to new rules aligned with the OECD's 'arm's length principle.' This change, which reflects a long-standing EU priority, brings greater tax certainty, reduces double taxation and simplifies compliance for EU businesses operating in Brazil. While the full impact will take time to materialise, the change already marks a major step forward in creating a fairer and more predictable trade environment.

In 2024, **good progress** was also made on tackling **export restrictions**.

- **Türkiye** removed a long-standing licensing regime for copper scrap exports which had in practice amounted to an export ban because of the prohibitive conditions it imposed. Copper scrap is now automatically registered for export.

- **India** and **Bangladesh** ended their long-standing export restrictions on hides and skins which had affected the EU clothing and leather industries for some time. **India** scrapped its excessive export duty on raw hides and skins and certain semi-finished leathers (which were the highest globally, ranging from 25% to 60%), which had limited the ability of the EU clothing industry to acquire a sufficient supply of raw materials from reliable sources at market prices. In 2025, basic customs duties were reduced from 10% to zero on wet blue leather for hides and skins and from 20% to zero on leather (crust hides). In 2024, Bangladesh partially lifted its export ban and now allows raw hides and wet blue leather to be exported on a case-by-case basis.

IV.2 Bilateral and multilateral enforcement of trade commitments: dispute resolution

While most barriers continue to be tackled by bilateral engagement with the trading partner through FTA committees or committees in the WTO, it continues to be necessary in some cases to move to formal dispute settlement procedures, either under a bilateral agreement or in the WTO. For the latter, it remains therefore **crucial to preserve the ability to get disputes adjudicated** between WTO Members.

In particular, the **Multi-Party Interim Appeal Arbitration Agreement** (MPIA) as well as *ad hoc* appeal arbitration agreements have helped to preserve the adjudication of disputes at the WTO notwithstanding the WTO's Appellate Body has not been functioning since 2019 due to the United States blocking the appointment of its members. The MPIA guarantees its participants access to a functioning dispute settlement system in the WTO and ensures that rules can be enforced, and trade disputes can be adjudicated, without appealing "into the void". After **Paraguay, Malaysia and the UK** joined in the first half of 2025, the MPIA now covers 57 out of 166 WTO Members (counting EU Member States), accounting for 57% of world trade. The MPIA was put in place in 2020 and has proven effective in ensuring the orderly resolution of disputes.

At the time of drafting this report, no appeals 'into the void' have been filed in any dispute between MPIA participants. The first MPIA award was issued in December 2022 in a case brought by the EU (*DS591, Colombia – Frozen fries*).

On 22 April 2025 the EU also appealed within the MPIA in case DS611 (*China – Anti-Suit Injunctions*). On 21 July, the WTO appeal Arbitrator overruled important findings of the initial panel and agreed with the EU that concluded that China's anti-suit injunction policy is inconsistent with the TRIPS Agreement. This is an important win for EU-based high-tech companies whose research outcomes were undermined by the Chinese policies in questions. It ensures European companies can continue to defend their intellectual property in European courts.

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 total, five new disputes were launched between June 2024 and July 2025:

- On 14 June 2024, the EU launched a **bilateral dispute settlement case** against **Algeria** under the EU-Algeria Association Agreement[47], in which it requested consultations with the Algerian authorities to address several restrictions on EU exports and investments, including, among others, an import licensing system having the effect of an import ban, subsidies contingent on the use of local inputs for car manufacturing, a cap on foreign ownership for companies importing goods into Algeria and an import ban on ceramics and marble. The EU is challenging those trade and investment restrictive measures as incompatible with Algeria's commitments under the EU-Algeria Association Agreement. Unfortunately, the consultations did not manage to resolve the EU's concerns. Therefore, on 15 July 2025, the EU proceeded to the next step in the dispute appointing an arbitrator.

- On 26 July 2024, the EU requested **dispute settlement** consultations at the **WTO** concerning **Taiwan's** use of local content criteria for offshore wind energy projects

[47] https://circabc.europa.eu/ui/group/09242a36-a438-40fd-a7af-fe32e36cbd0e/library/46ce9fe8-838a-4d71-8dde-9f4cd9976d3e/details?download=true

(DS625, *Chinese Taipei — Measure Relating to Investments in Offshore Wind Installations*). In the view of the EU, Taiwan's local content eligibility and award criteria in energy generation capacity allocation auctions for offshore wind farms discriminated against imported goods and services. Following consultations, in November 2024 the EU and Taiwan reached an understanding on how Taiwan would address the EU's concerns going forward. The EU is monitoring the implementation of these commitments.

- On 23 September 2024, the EU requested **dispute settlement consultations with China** at the WTO on the initiation of an anti-subsidy investigation against imports of certain dairy products from the European Union (DS628, *China — Initiation of CVD Investigation on Imports of Certain Dairy Products*). This was the first time the EU decided to challenge an investigation at initiation stage. The EU's action was prompted by an emerging pattern of China initiating trade defence measures, based on questionable allegations and insufficient evidence, within a short period of time. In so doing, the Commission is following through on its commitment to firmly defend the interests of the EU dairy industry and the Common Agricultural Policy against abusive proceedings.

- On 25 November 2024, the EU requested **dispute settlement consultations with China** at the WTO on provisional anti-dumping duties imposed by China on EU brandy (DS631, *China — Provisional Anti-dumping Duties on Brandy from the EU*). Consultations were requested because the EU believes the provisional measures to breach WTO rules as China based them on insufficient evidence and questionable allegations (in particular, on the existence of a threat of injury to its brandy industry and on the causal link between the alleged threat of injury and imports of brandy from the EU).

- On 20 January 2025, the EU requested **dispute settlement consultations with China** at the WTO over Chinese court's practice of fixing worldwide royalty rates for standard essential patents without the consent of the patent holder (DS632, *China — Worldwide Licensing Terms for Standard Essential Patents*). These practices prevent EU companies from seizing EU courts to defend their IP rights and pressures innovative European companies into lowering royalty rates on their patents on a worldwide basis for the benefit of Chinese companies.

Where the EU is confronted with delaying tactics or partner countries fail to comply with the expert panels' conclusions the Commission may activate **compliance proceedings**, as done in DS577 (*US – Ripe olives*). Following the failure by the US to implement the findings of the compliance panel report of 14 March 2024, the EU, on 14 November 2024, requested the WTO Dispute Settlement Body to authorise the imposition of countermeasures as provided by Article 22.2 of the Dispute Settlement Understanding (DSU). Following the US request for an arbitration on the level of countermeasures proposed by the EU, a WTO panel was established on 29 November 2024 and the proceedings are currently ongoing.

Finally, the Commission continued efforts to **ensure the full implementation of panel rulings** in the EU's favour. To do so, it is making full use of the possibilities offered by the WTO dispute settlement scheme. In November 2024 the Commission launched a consultation under its strengthened **Enforcement Regulation** [48] on the effect that **India's** WTO inconsistent tariffs on certain ICT goods have on entities affected by the Indian measures or by possible EU commercial policy measures in response.

IV.3 The Single Entry Point

The Commission's **Single Entry Point** is a centralised platform for companies, trade associations and other EU stakeholders to efficiently report trade barriers. It provides a streamlined process for assessing complaints and has now received more than 180 external complaints since it was launched five years ago. The vast majority (approximately 97%) concern market access issues, while 3% relate to trade and sustainable development (TSD) matters. In 2024, the Single Entry Point again proved to be an effective instrument.

Single Entry Point: How does it work?

Complaints may be submitted using dedicated online forms on the Access2Markets platform. There is one form for market access issues and another for TSD matters and the General Scheme of Preferences (GSP). These forms are intended to provide the European Commission's Directorate-General for Trade and Economic Security (DG TRADE) with sufficient information to carry out a preliminary assessment and determine the appropriate course of action.

In December 2023, DG TRADE updated and further streamlined the Single Entry Point operational guidelines[49], introducing an indicative timeline of 120 working days for the processing of TSD/GSP-related complaints.

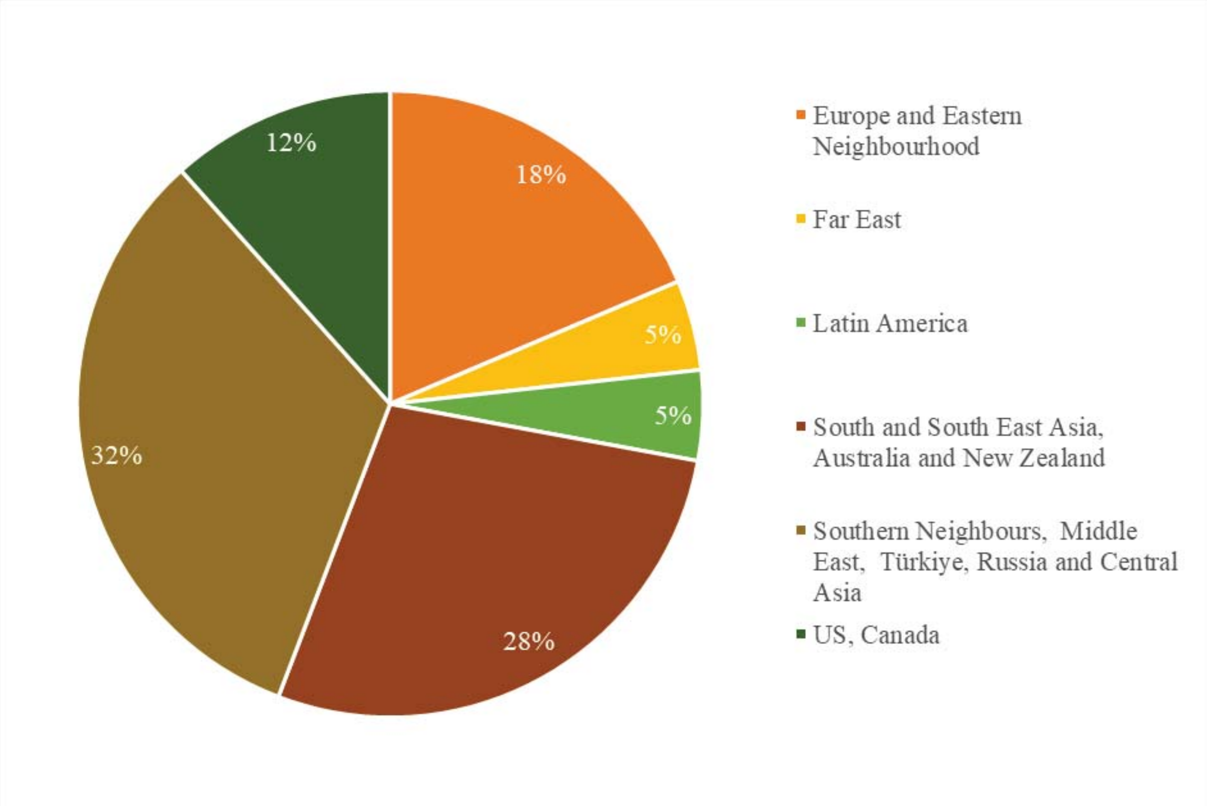
To clarify matters, pre-notification meetings may be organised with prospective complainants and follow-up discussions may be held once complaints have been submitted. The Commission may also, if necessary, launch a complaint on its own initiative (*ex officio*).

In 2024, the Single Entry Point received **43 complaints** concerning trade barriers **in 24 partner countries**, spanning all geographical regions. As in previous years, the largest number of complaints (approximately one third) concerned the region comprising the Southern Neighbourhood, the Middle East, Türkiye, Russia and Central Asia. This was followed by the region comprising South and South-East Asia, Australia, and New Zealand, which accounted for 28% of complaints. Europe and the Eastern Neighbourhood[50] accounted

[48] Regulation (EU) 2021/167 of the European Parliament and of the Council of 10 February 2021 amending Regulation (EU) No 654/2014 concerning the exercise of the Union's rights for the application and enforcement of international trade rules (OJ L 49, 12.2.2021, p.1, ELI: http://data.europa.eu/eli/reg/2021/167/oj).
[49] https://trade.ec.europa.eu/access-to-markets/en/form-assets/operational_guidelines.pdf
[50] The Eastern Neighbourhood comprises six Eastern European and South Caucasus countries (Armenia, Azerbaijan, Belarus, Georgia, Moldova and Ukraine) which enjoy cooperation with the EU as part of the European Neighbourhood Policy (ENP).

for nearly one fifth of all complaints. Together these three regions accounted for approximately 78% of all complaints received in 2024.

Figure 10: Complaints submitted to the Single Entry Point in 2024 by region



In 2024, the Single Entry Point received complaints from a broad range of stakeholders. **The vast majority were submitted by EU businesses**, with 25 complaints coming from individual companies, 10 from European trade associations, and 3 from national industry associations. An additional four complaints were submitted by EU Member States. This is consistent with the general trend since the Single Entry Point was launched. To date, 89% of all external complaints have come from EU businesses, with 52% from individual companies, 29% from EU-level associations, and 8% from national associations. Member States account for the remaining 10%.

So far, 48% of all complaints submitted have related to the identification of new or existing trade barriers.

Not all complaints received in 2024 led to the finding of a trade barrier. Furthermore, some complaints were not taken up as they were not submitted to the Single Entry Point by EU stakeholders or other bodies entitled to submit complaints in accordance with the operating guidelines. A number of complaints were not processed further because the Single Entry Point did not receive sufficient information to proceed with an assessment. In addition, some complaints concerned EU Member States and were therefore outside the scope of the Single Entry Point. Finally, some complaints were not registered as trade barriers as the Single Entry

Point did not find any evidence of an infringement in its preliminary assessment. These complaints were closed without any further action.

A practical example: Argentina – ceramic tiles

Complaint: At the end of 2023, the Single Entry Point received a complaint concerning a resolution introduced by **Argentina** establishing a new import certification scheme for both domestically produced and imported ceramic tiles.

Issue reported: The scheme required manufacturers to have a third-party conformity assessment carried out by the Argentine Institute of Standardisation and Certification (IRAM) before they could place their products on the market. This measure was regarded as an unnecessary obstacle for EU manufacturers who already manufacture their tiles according to a globally accepted self-certification standard which does not call for a third-party conformity assessment. The scheme therefore imposed a significant economic/administrative burden on EU companies wishing to compete on the Argentinian market.

Action taken: Following joint efforts by the Commission, various Member States and the EU delegation in Buenos Aires, a meeting was held in March 2024 with the Argentinian Secretary of Commerce who conceded that the resolution placed an excessive burden on producers and put the final consumer in Argentina at risk of having to pay higher prices for ceramic tiles.

Solution: On 30 August 2024, a new resolution (236/2024) was published which removed the requirements for importers. Instead, companies that are required to certify imports of construction materials (including ceramic tiles) will be able to present a sworn declaration of compliance with international certification, which will be deemed equivalent to certification by the IRAM. The removal of this barrier is estimated to be worth approximately EUR 16 million per year to EU exporters of ceramic tiles to Argentina.