

**BRIEFING: THAILAND**

# Animal Protection in EU Trade Negotiations

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# EXECUTIVE SUMMARY

**In 2023, the EU relaunched negotiations for a free trade agreement (FTA) with Thailand. While the EU's imports from Thailand are dominated by manufactured goods such as machinery and transport equipment, agri-food products account for around 11% of total imports. Thailand is a major global producer of preserved and prepared chicken, canned tuna, frozen shrimp, and pig meat. Currently, preserved and prepared chicken represents one-fifth of EU agri-food imports from Thailand, and a trade agreement could potentially increase import quotas for this sector as well as for other agri-food products.**

Against this backdrop, and in light of the EU's forthcoming revision of its animal welfare legislation, the negotiations present an opportunity to strengthen EU-Thailand cooperation on animal welfare for both farmed and wild animals. In practice, Thailand's primary animal protection legislation, the Prevention of Animal Cruelty and Animal Welfare Provision Act was introduced in 2014, contains regulatory and enforcement gaps hindering its effective implementation. Instead, the Department of Livestock Development's voluntary Good Agricultural Practices standards for farm animals serves as the main vehicle for improving farm animal welfare. Their standards are broadly aligned with EU requirements, meeting higher welfare conditions than producers supplying the domestic market, therefore it is primarily export-oriented producers that comply with these Good Agricultural Practices standards. Nevertheless, serious concerns remain regarding the welfare of poultry, pigs, and fish, particularly those not destined for export.

Beyond farm animal welfare, an agreement could also provide a platform for closer cooperation on related sustainability challenges, including combating IUU fishing, tackling illegal wildlife trade, preventing deforestation, and addressing the exploitation of captive wildlife for economic purposes. Despite being a signatory to CITES since 1983 and implementing national laws such as the Wild Animal Reservation and Protection Act and the Prevention of Animal Cruelty and Welfare Provision Act, gaps remain in enforcement and monitoring. Illegal wildlife trade, including elephants, tigers, pangolins, and rhinos, threatens Thailand's rich biodiversity, which includes 575 globally threatened and 1,058 nationally threatened species. The ivory trade illustrates regulatory loopholes, as domesticated elephants can be legally traded, creating opportunities for illegal wild-capture misrepresentation. The trade has increasingly moved online, while markets such as Chatuchak remain hubs for pet trafficking. Tourism also exacerbates welfare issues, particularly for elephants and tigers used in riding, performances, and photo opportunities, often involving abusive training practices. Deforestation has further compounded risks to wildlife, reducing Thailand's forest cover from 53% in 1960 to around one-third today and fragmenting habitats, which has increased human-wildlife conflicts.

As the EU is in the process of revising its animal welfare legislation and has indicated that these higher standards should also extend to imports of animal products. The negotiation of the EU-Thailand FTA provides an opportunity to more closely cooperate on levels of protection, both for animals and the environment. Leveraging market access and harnessing these negotiations with Thailand for meaningful cooperation could guarantee both smooth future trade flows and improved animal welfare conditions.

In the context of the EU-Thailand FTA negotiations, the EU should focus on strengthening actionable commitments on sustainable food systems, animal welfare, biodiversity, and forest management. For the Sustainable Food Systems (SFS) and Animal Welfare Chapter, the FTA should formalise cooperation through dedicated committees or working groups with clear timelines and meeting frequencies. Provisions should explicitly recognise animal sentience and address humane transport and slaughter practices. Aquatic animal welfare should be explicitly included.

Under the Trade and Sustainable Development (TSD) Chapter, the FTA should ensure strong environmental provisions across fisheries, aquaculture, biodiversity, wildlife trade, and forests. Measures should combat IUU fishing, prevent overfishing, promote recovery of overfished stocks, minimise by-catch, and enforce sustainable aquaculture practices aligned with biodiversity targets. For wildlife and forests, the Parties should effectively implement CITES and CBD obligations, phase out domestic laws permitting wildlife domestication for private or tourism use, reduce biodiversity loss, restore ecosystems, and minimise human-wildlife conflicts. Forest provisions should support sustainable management, combat illegal logging, and address commodity-driven deforestation, promoting cooperative dialogue to improve biodiversity outcomes and ensure compliance with the EU Deforestation Regulation.

# EUROGROUP FOR ANIMALS' **CALLS ON THE EU TO:**

**1**

**Limit the volume granted in tariff-rate quotas** (TRQs) to animal-based products, and condition access, especially for chicken meat, to such TRQs on relevant the respect of animal welfare standards equivalent to the ones applied in the EU;

**2**

**Include an upward regulatory alignment objective** in the provisions on animal welfare cooperation, covering all kind of animals (not only farm animals but also animals used in science, as well as wild ones) and not restricted to slaughter and transport;

**3**

**Include a recognition of the link between animal welfare and sustainable agriculture**, underlying how improved animal welfare can contribute to fight global crises such as climate change and antimicrobial resistance;

**4**

**Include strong and detailed language in the Trade and Sustainable Development chapter:**

- **on wildlife trafficking** (rescue centres, including new species in CITES), with mention of species-specific concerns;
- **on deforestation and biodiversity**, promoting ecosystem restoration and compliance with the EU Deforestation Regulation (EUDR);
- **on the importance of ensuring fish welfare** to make aquaculture sustainable;
- **on enforcement, providing access to the dispute settlement mechanism** to external stakeholders, creating clear roadmaps identifying priority issues and monitoring them, and including last-resort sanctions.



# 1. INTRODUCTION



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## 1.1 CONTEXT OF NEGOTIATIONS

In 2007, the European Union (EU) initiated trade negotiations with the Association of Southeast Asian Nations (ASEAN) bloc in an effort to attain improved market access in Southeast Asian markets. However, these regional negotiations were paused after two years due to the challenges posed by differing economic and governance systems among ASEAN countries, which led the EU to pursue bilateral agreements instead.<sup>1</sup> Since then, the EU has finalised bilateral trade agreements with Singapore and Vietnam and continues talks with Indonesia, the Philippines, and Thailand.<sup>2</sup>

Bilateral trade negotiations between the EU and Thailand were launched in March 2013, yet these negotiations stalled following Thailand's 2014 military coup.<sup>3</sup> The following five years of military rule were marked by restrictions on civil liberties, suppression of opposition, and tight political control.<sup>4</sup> Although elections were held in 2019, concerns remained due to the continued influence of the military under a constitution it had crafted, casting doubt on the integrity of Thailand's democratic restoration.<sup>5</sup> Despite the concerns surrounding Thailand's democratic integrity after the elections, the Council of the EU issued formal conclusions on its stance toward Thailand,<sup>6</sup> leading to a renewed engagement between the two partners.<sup>7</sup> This led to the signature of the EU-Thailand Partnership and Cooperation Agreement in December 2022,<sup>8</sup>

<sup>1</sup> European Commission (n.d.), *Association of Southeast Asian Nations (ASEAN)*. [Link](#)

<sup>2</sup> European Commission (n.d.), *Negotiations and agreements*. [Link](#)

<sup>3</sup> European Commission (n.d.), *Thailand – EU country and region trade relations*. [Link](#)

<sup>4</sup> Russell, M. & Manoharan, T. (2018), *EU–Thailand: trade and political relations*, European Parliament Research Service. [Link](#)

<sup>5</sup> Freedom House (2020), *Freedom in the World – Thailand*. [Link](#)

<sup>6</sup> Council of the European Union (2019), 13066/19 Outcome of the Council Meeting, 3720<sup>th</sup> Council meeting – *Council conclusions on Thailand*. [Link](#)

<sup>7</sup> Council of the European Union (14 October 2019), Press release: *Thailand: EU to broaden its engagement following elections*. [Link](#)

<sup>8</sup> EUR-Lex (2023), *Legislative summary: EU–Thailand Framework Agreement on Comprehensive Partnership and Cooperation*. [Link](#)

and trade negotiations officially resumed in September 2023.<sup>9</sup> In June 2025, a Thai trade representative had stated they initially hoped to conclude the negotiations before the end of the year, though they have since adjusted that time horizon, hoping to agree on half of the agreement by year's end.<sup>10</sup>

Since April 2025, five rounds of negotiations have taken place,<sup>11</sup> with a sixth round planned for 23 June 2025. The fifth round of negotiations report states that, in principle, the chapters on Customs and Trade Facilitation and Sustainable Food Systems (SFS) were closed.<sup>12</sup> Concerning the latter, the fourth round of negotiations report involved “positive discussions” on provisions related to cooperation on areas such as food systems sustainability, fraud in the agri-food chain, animal welfare, antimicrobial resistance and institutional arrangements.<sup>13</sup> Likely during the fifth round of negotiations, the Parties came to an agreement concerning the content and extent of their cooperative activities in these areas.

The Trade and Sustainable Development (TSD) Chapter remains under negotiation as Parties have yet to agree on the language used concerning the implementation of multilateral environmental agreements (MEAs) and gender conventions (i.e., to what extent these provisions will become enforceable). Similarly, the precise wording for the articles on trade and responsible business conduct, trade and biodiversity, trade and forests, and scientific and technical information has yet to be agreed upon. The application of the agreement's general dispute settlement mechanism concerning TSD provision (and possible suspension of trade concessions in case of non-compliance) remains undecided.<sup>14</sup>

## 1.2 GENERAL ECONOMIC AND TRADE BACKGROUND OF THAILAND

Thailand is home to over 71.5 million people<sup>15</sup> with almost 16% of the population living in the capital of Bangkok.<sup>16</sup> Among Southeast Asian countries and members of the ASEAN which includes Brunei, Myanmar, Cambodia, Indonesia, Laos, Malaysia, the Philippines, Singapore, and Vietnam, Thailand is classified as an upper-middle-income country alongside Indonesia and Malaysia.<sup>17</sup>

Economically speaking, Thailand's economy is relatively export-oriented with exports of goods and services equalling approximately 70%<sup>18</sup> of its gross domestic product (GDP) which amounted to 458 billion euros in 2024.<sup>19</sup> Major sectors include services (59% value added as share of GDP), industry (32%) and agricultural production (8.7%)<sup>20</sup> employing a respective 46%, 23% and 31% of the workforce.<sup>21</sup>

Figure 1 presents the 2021–2024 average value of goods imported to the EU from Thailand, with manufactured products making up a significant share of Thailand's exported goods to the EU (73%), primarily machinery and transport equipment (61%). Agricultural products make up 11% of total imported goods from the EU.

The overall economic significance of Thailand's agricultural sector has shrunk from 36% of Thailand's GDP in 1960 to 8–11% of GDP since 1993.<sup>22</sup> Still, the sector remains highly relevant as it diversifies Thai exports and employs a third of the working population, including providing livelihoods in more rural areas of the country. Prominent Thai agricultural exports include rice, rubber, sugar, canned tuna, chicken meat, pig meat, shrimp, cassava products and canned pineapple.<sup>23</sup>

<sup>9</sup> European Commission (15 March 2023), Press release: *EU and Thailand relaunch trade negotiations*. [Link](#)

<sup>10</sup> Francis, R. (4 June 2025), *EU trade update: Australia, Thailand, India, South Africa, Türkiye, US and China*. Borderlex. [Link](#)

<sup>11</sup> European Commission (2025), *EU-Thailand agreement: Documents*. [Link](#)

<sup>12</sup> European Commission (10 April 2025), *Report of the 5th round of negotiations on a Free Trade Agreement between the European Union and Thailand*. [Link](#)

<sup>13</sup> European Commission (20 December 2024), *Report of the 4th round of negotiations on a Free Trade Agreement between the European Union and Thailand*. [Link](#)

<sup>14</sup> European Commission (10 April 2025), *Report of the 5th round of negotiations on a Free Trade Agreement between the European Union and Thailand*. [Link](#)

<sup>15</sup> World Health Organization (2023), *Thailand - WHO data*. [Link](#)

<sup>16</sup> World Population Review (2025), *Bangkok, Thailand Population 2025*. [Link](#)

<sup>17</sup> Metreau, E., Young, K. E., & Eapen, S. G. (2024), *World Bank country classifications by income level for 2024–2025*. World Bank Blogs. [Link](#)

<sup>18</sup> World Bank (2025), *Exports of goods and services (% of GDP) – Thailand*. [Link](#)

<sup>19</sup> European Commission (2025), *Overview of Thailand*. EC country fact sheets. [Link](#)

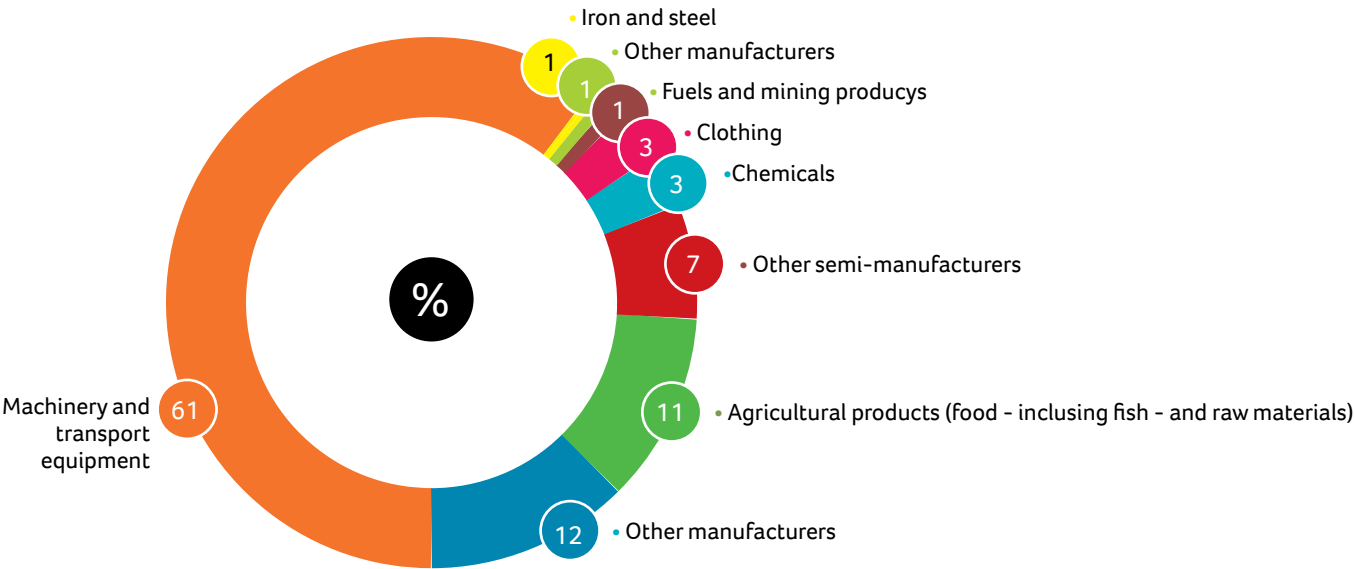
<sup>20</sup> World Bank (2025), *Services value added (% of GDP) – Thailand*. [Link](#); WB (2025), *Industry value added (% of GDP) – Thailand*. [Link](#); WB (2025), *Agriculture, forestry, and fishing, value added (% of GDP) – Thailand*. [Link](#)

<sup>21</sup> International Labour Organization (2022), *Thailand – Employment-environment-climate nexus*. [Link](#)

<sup>22</sup> World Bank (2025), *Agriculture, forestry, and fishing, value added (% of GDP) – Thailand*. [Link](#)

<sup>23</sup> United States Department of Agriculture (2020), *Food Processing Ingredients – Thailand*. [Link](#)

**Figure 1:** EU imports from Thailand, average trade value from 2021 to 2024



Chickens represent the most extensively processed species in Thailand’s livestock sector, accounting for the highest volume of animal slaughter, approximately 1.3 billion chickens per year.<sup>24</sup> Both broiler chickens and laying hens supply the domestic market with meat and eggs, respectively. However, while eggs are predominantly consumed within the country, frozen broiler chicken meat constitutes a major export commodity.<sup>25</sup>

Figure 2 presents the share of the EU’s main agri-food imports from Thailand by product type, highlighting that poultry and eggs make up 23% of total agri-food imports in 2024, equivalent to 491 million euros.<sup>26</sup> However, this is predominantly made up of imports of broiler chicken, as egg imports from Thailand are negligible.<sup>27</sup>

**Relevance of import quotas for agri-food trade**

Thailand’s agri-food exports to the EU, particularly chicken meat, are subject to import quotas, which the EU frequently uses to regulate trade in sensitive products. An import quota is a trade policy tool that limits the volume of a specific good that can be imported into a country or region over a set period. Unlike tariffs, which raise the price of imports, quotas directly cap quantities, giving governments certainty over how much enters their market. Countries implement quotas mainly to protect sensitive domestic sectors, stabilise prices, or safeguard food security.

In the European Union, import quotas are most commonly applied in the agri-food sector, covering products such as beef, sugar, and dairy, where they serve to shield farmers from sudden surges in cheaper imports while balancing consumer access to foreign products. Today, these restrictions are usually managed through tariff-rate quotas (TRQs), which allow limited volumes of certain goods to enter at a lower tariff, with higher tariffs applying once the quota is filled.

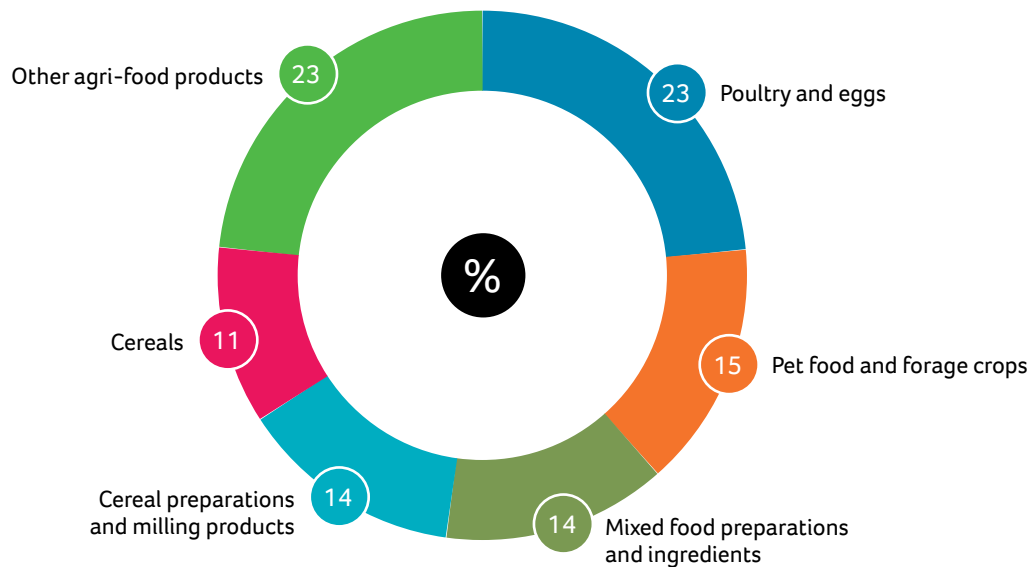
<sup>24</sup> Food and Agriculture Organization of the United Nations (2025) with major processing by Our World in Data. *Number of cattle slaughtered for meat – FAO* [dataset]; Food and Agriculture Organization of the United Nations. *Production: Crops and livestock products* [original data]. [Link](#)

<sup>25</sup> Bangkok Post (2 February 2025), *Export of livestock products sees 11 % growth*. [Link](#)

<sup>26</sup> European Commission DG AGRI (2025), *Agri-food trade statistical factsheet: European Union – Thailand*. [Link](#)

<sup>27</sup> European Commission (2025), *EU trade statistics (excluding United Kingdom)*. [Link](#)

**Figure 2:** Share of EU agri-food imports from Thailand (2024)<sup>29</sup>



In addition to poultry, seafood (encompassing both capture fisheries and the increasingly prominent aquaculture sector<sup>28</sup>) and pig meat also contribute to Thailand's supply of animal protein for domestic consumption and international trade. However, their export volumes remain significantly lower than those of frozen broiler chicken meat, apart from canned tuna (see section 2.2). Pork and fish products play a comparatively modest role in Thailand's agri-food exports.

## 1.3 AN OVERVIEW OF ANIMAL PROTECTION LEGISLATION BETWEEN TRADE PARTNERS

### 1.3.1 Thailand's animal protection frameworks

Thailand's main animal welfare legislation is the Prevention of Animal Cruelty and Animal Welfare Provision Act, B.E. 2557 (2014).<sup>30</sup> The Act is intended to prevent general cruelty and ensure basic care across all animals, including pets, livestock, and wild animals (those covered by the Act as determined by the Minister of Agriculture). However, this piece of legislation features 20 exclusions to animal cruelty, including all slaughter procedures, animal fights and animal experiments. Moreover,

the Act lacks specific regulations concerning the rearing and transport of farm animals except for poultry.<sup>31</sup>

The Thai Department of Livestock Development (DLD) is legally empowered to issue regulations concerning the care and management of farm animals. In 2011, the DLD exercised this authority by adopting specific rules aimed at safeguarding the welfare of poultry across key stages of production, including on-farm rearing, transport, and slaughter (B.E. 2554). These regulations mandate that poultry must be allowed to move freely, receive nutrition appropriate to their physiological needs, and be kept in environments with adequate space and ventilation. During transport, measures must be taken to prevent unnecessary pain or distress, and at slaughter, birds must be stunned using an electrical water-bath system to reduce suffering.<sup>32</sup> Since the enactment of the Prevention of Animal Cruelty and Animal Welfare Provision Act in 2014, the DLD further reinforced its role in animal welfare governance by introducing national standards for cage-free egg production in 2020, signalling a move toward more humane production systems.<sup>33</sup>

Thailand's DLD administers a voluntary "Good Agricultural Practice" (GAP) standard mainly focused on the quality and safety of livestock products.<sup>34</sup> Inspection-based certification via GAP is commonly pursued by producers targeting export markets, where alignment with higher environmental and

<sup>28</sup> **Food and Agriculture Organization** (2025), *The state of world fisheries and aquaculture – Thailand country profile*. [Link](#)

<sup>29</sup> Figure drafted by authors using data from **European Commission DG AGRI** (2025), *Agri-food trade statistical factsheet: European Union – Thailand*. [Link](#)

<sup>30</sup> **FAO-Lex** (2014), *Cruelty Prevention and Welfare of Animal Act, B.E. 2557 (2014)*. [Link](#)

<sup>31</sup> **World Animal Protection** (2020), *Animal Protection Index (API) 2020 – Kingdom of Thailand: ranking D*. [Link](#)

<sup>32</sup> *Ibid.*

<sup>33</sup> **Linden, J.** (1 September 2020), *Thailand sets standards for hen welfare*. WATTPoultry. [Link](#)

<sup>34</sup> **World Animal Protection** (2020), *Animal Protection Index: Thailand country report*. [Link](#)



welfare standards of trading partners (especially the EU) is essential.<sup>35</sup> Producers focused solely on the domestic Thai market, usually small farmers, rarely adopt the GAP standard as there is no regulatory mandate nor significant consumer demand domestically for higher-tier welfare compliance.

### 1.3.2 State of EU animal welfare legislation

The EU has a framework of Directives and Regulations for safeguarding animal welfare. Based on the EU's competences, most standards are for farmed animals, including a horizontal Directive establishing general rules for the protection of animals kept for food, wool, skin, fur, or other farming purposes,<sup>36</sup> as well as specific Directives on the conditions (space, enrichment, handling) for animals such as broilers,<sup>37</sup> pigs,<sup>38</sup> laying hens,<sup>39</sup> meat poultry,<sup>40</sup> calves<sup>41</sup> and Regulations focusing on animal welfare during transport<sup>42</sup> and at the time of slaughter.<sup>43</sup> EU

standards have progressively expanded, including a ban on conventional battery cages for laying hens and legislation to phase out individual stalls for pregnant sows. The EU provides a minimum baseline protection for animals, while enforcement and further ambition are in the hands of the Member States, with widely varying standards.<sup>44</sup>

Under the Farm-to-Fork strategy, several legislations are under review to align the law with the latest scientific findings. Despite efforts from the public to advance animal welfare, the EU Citizen Initiative 'End the Cage Age' calling for the ban of cages for laying hens, pigs and calves did not lead to a legislative proposal at EU level.<sup>45</sup> Among other measures, EU-wide time-bound objectives are recommended to counteract the lack of harmonious animal welfare targets in the EU, which interfere with the potential for coherence and cross-border progress across Member States.<sup>46</sup>

<sup>35</sup> FAO (n.d.), *Environmental, Health, and Welfare Issues on Thai Livestock Sector*. [Link](#)

<sup>36</sup> Directive 98/58/EC concerning the protection of animals kept for farming purposes. [Link](#)

<sup>37</sup> Council Directive 2007/43/CE laying down minimum rules for the protection of chickens kept for meat production. [Link](#)

<sup>38</sup> Directive 2008/120/EC laying down minimum standards for the protection of pigs. [Link](#)

<sup>39</sup> Directive 1999/74/EC laying down minimum standards for the protection of laying hens. [Link](#)

<sup>40</sup> Directive 2007/43/EC laying down minimum rules for the protection of chickens kept for meat production. [Link](#)

<sup>41</sup> Directive 2008/119/EC laying down minimum standards for the protection of calves. [Link](#)

<sup>42</sup> European Commission (2025), *Protection of animals during transport*. [Link](#)

<sup>43</sup> European Commission (2025), *Slaughter and Stunning*. [Link](#)

<sup>44</sup> Eurogroup for Animals (2025), *The fragmented landscape of animal welfare legislation in the European Union*. [Link](#)

<sup>45</sup> Compassion in World Farming (2024), *Campaigners launch legal action against European Commission for failing to deliver caged farming ban*. [Link](#)

<sup>46</sup> Godfroy, A. & Muro, M. (2025), *Improving animal welfare through the Common Agricultural Policy*. Institute for European Environmental Policy. [Link](#)

# 2.

## THAI AGRI-FOOD PRODUCTION AND ANIMAL WELFARE CONCERNS

The following section discusses the production and export significance of Thai animal food products, as well as animal welfare concerns related to their production. This section focuses on chickens (broilers and laying hens), seafood (marine capture and aquaculture of fish and crustaceans), and pigs.

As discussed in section 1.3, the Prevention of Animal Cruelty and Animal Welfare Provision Act intends to ensure basic care across all animals and halt cruelty towards animals including livestock. However, in practice the Act features exclusions and lacks regulations concerning the slaughter, rearing and transport of many farm animals, with the exception for chickens.

### 2.1 CHICKEN MEAT AND LAYING HENS

#### 2.1.1 Chicken meat

Thailand is a major global exporter of chicken meat, supplying a wide range of products including fresh, chilled, frozen, prepared, and preserved meat to international markets. It is projected that for 2025, Thai exports of chicken meat will total €3.8 billion, with chicken meat accounting for 70% of exports and chilled and frozen chicken meat accounting for the remaining 30%.<sup>47</sup> The EU began importing fresh and frozen chicken meat from Thailand in 2012 alongside existing imports of processed chicken meat. Following Brexit in 2019, the EU revised its import quotas for processed chicken meat products to allow increased imports from Thailand.<sup>48</sup> The European Union is a key destination for these exports (see Tables 1 and 2), although it represents only a portion of Thailand's total export volume. A significant share of Thai broiler chicken meat is directed toward regional trading partners, notably China, Japan, Malaysia, and South Korea.<sup>49</sup>

**Table 1:** EU imports from Thailand, Prepared/preserved meat, chicken<sup>50</sup>

| Country (2024) | Value [€]          | Weight [kg]       |
|----------------|--------------------|-------------------|
| Netherlands    | 168.918.941        | 41.924.110        |
| Ireland        | 70.715.785         | 19.457.388        |
| Germany        | 46.400.562         | 12.218.404        |
| France         | 20.279.254         | 3.858.523         |
| Belgium        | 6.308.020          | 1.273.532         |
| Romania        | 361.125            | 82.520            |
| Spain          | 274.021            | 61.923            |
| Malta          | 140.277            | 36.067            |
| Sweden         | 18.637             | 3.244             |
| Denmark        | 581                | 210               |
| <b>Total</b>   | <b>313.417.203</b> | <b>78.915.921</b> |

The Thai market for poultry meat is dominated by broiler chickens<sup>51</sup> with common breeds being the CP707 and the Arbor Acres,<sup>52</sup> both which have been selectively bred for rapid weight gains in minimal time periods. Broiler chickens in Thailand are typically raised in closed farming systems designed to regulate temperature and prevent contamination from external sources, including wild birds. While this method is intended to control disease and environmental variables, it also poses significant welfare concerns. High stocking densities, insufficient ventilation, and inadequate sanitation can lead to ammonia buildup, poor air quality, and unhygienic conditions that increase the risk of illness and the rapid spread of disease among birds. Studies indicate that many farms do not routinely clean feeders or disinfect equipment, creating

<sup>47</sup> [aviNews Thailand](#) (15 August 2025), *Thailand's chicken industry set to grow in 2025 amid global headwinds*. [Link](#)

<sup>48</sup> [Kornboonrits, S.](#) (2023), *Industry Outlook 2023-2025: Chilled, Frozen and Processed Chicken Industry*. Krungsri Research. [Link](#)

<sup>49</sup> [OECD](#) (2023), *Where does Thailand export Poultry Meat to?* (2023). [Link](#)

<sup>50</sup> [European Commission](#) (2025), *EU trade statistics (excluding United Kingdom), HS 160232 Prepared/preserved meat, chicken*. [Link](#)

<sup>51</sup> [USDA Foreign Agricultural Service](#) (2018), *Thailand – Poultry and Products Annual*. [Link](#)

<sup>52</sup> [Chokesomritpol, P., NaRanong, V. & Kennedy, A.](#) (2018), *Transformatino of the Thai Broiler Industry*. IFPRI Discussino Paper 01765. [Link](#); [Jaturasitha, S., Leangwunta, V., Leotaragul, A., Phongphaew, A., Apichartsrunkoon, T., Simasathitkul, N., Vearasilp, T., Worachai, L., ter Meulen, U.](#) (2002), *A Comparative Study of Thai Native Chicken and Broiler on Productive Performance, Carcass and Meat Quality*. [Link](#)

further challenges for biosecurity and animal health.<sup>53</sup> In extreme cases, broilers have been found housed alongside dead or dying birds, underscoring a lack of consistent oversight in farm operations.<sup>54</sup>

**Table 2:** EU imports from Thailand, Poultry fresh, chilled, frozen<sup>55</sup>

| Country (2024) | Value [€]         | Weight [kg]      |
|----------------|-------------------|------------------|
| Netherlands    | 12.559.449        | 4.396.419        |
| Ireland        | 1.095.520         | 363.286          |
| Germany        | 938.827           | 355.980          |
| Belgium        | 522.260           | 226.904          |
| Cyprus         | 88.528            | 25.200           |
| Denmark        | 24.825            | 7.716            |
| <b>Total</b>   | <b>15.229.409</b> | <b>5.375.505</b> |

EU audits have highlighted shortcomings in Thailand's chicken meat sector, confirming many of the welfare and biosecurity concerns described above. In 2018 and 2019, DG SANTE found serious deficiencies in official controls, including unrecorded hygiene failings in establishments, inadequate hazard analysis and critical control point (HACCP) procedures, and insufficient measures to address persistent Salmonella contamination at farm and processing level.<sup>56</sup> A 2020 follow-up audit noted that corrective actions had been implemented, resulting in significant improvements to hygiene standards, veterinary supervision, and testing protocols, which contributed to a marked reduction in Salmonella notifications.<sup>57</sup> However, parallel animal health audits in 2020 revealed gaps in surveillance for avian influenza and Newcastle disease, raising doubts about the capacity of authorities to guarantee early detection of these diseases.<sup>58</sup> In 2022, subsequent audits concluded that Thailand had substantially strengthened surveillance systems and laboratory capacity, enabling the

authorities to provide credible guarantees on disease detection and certification, although some areas, such as monitoring of low pathogenic avian influenza strains, still required improvement.<sup>59</sup>

Thai farmers looking to export their chicken meat to the EU must abide by EU standards, i.e., for closed rearing systems is capped at 33 kg/m<sup>2</sup> (about 14 birds/m<sup>2</sup>), with higher limits of 39 kg/m<sup>2</sup> and 42 kg/m<sup>2</sup> allowed only if farms meet additional environmental and reporting requirements.<sup>60</sup> As such, Thai farmers can voluntarily attain the DLD's GAP standard for broiler farms (TAS 6901-2009) which mirrors the EU's 33 kg/m<sup>2</sup> limit for closed systems and sets a lower maximum of 20 kg/m<sup>2</sup> for open systems.<sup>61</sup> Since compliance is not mandatory and is typically pursued only by farms aiming to supply EU-approved export slaughterhouses, it is typically pursued by major agri-food producers and exporters, for example, CP Foods adheres to the EU's maximum stocking density of 33 kg/m<sup>2</sup> on average, though variations may apply.<sup>62</sup>

Though major Thai chicken meat exporters meet current EU standards for broilers, with the upcoming revision of the EU's animal welfare legislation, these standards should be adjusted to account for improved welfare of chickens. Research shows that even at 33 kg/m<sup>2</sup>, broilers experience elevated stress and reduced immune function.<sup>63</sup> The European Food Safety Authority (EFSA) has found that densities above 11 kg/m<sup>2</sup> increase footpad dermatitis, impair walking ability, and limit comfort and exploratory behaviours. EFSA further recommends restricting growth rates to 50 g/day to improve welfare.<sup>64</sup> The European Chicken Commitment (ECC), also known as the Better Chicken Commitment, is a set of welfare standards that provides a compromise between high welfare standards and high profitability, and offers a stocking density limit of 30 kg/m<sup>2</sup> and a breed approved as higher welfare through a scientifically developed welfare protocol. The ECC is successfully adopted by

<sup>53</sup> Souris, M., Selenic, D., Khaklang, S., Ninphanomchai, S., Minet, G., Gonzalez, J.P. & Kittayapong, P. (2014), *Poultry farm vulnerability and risk of avian influenza re-emergence in Thailand*. International Journal of Environmental Research and Public Health. 11(1):934-51. doi: 10.3390/ijerph110100934. [Link](#)

<sup>54</sup> World Animal Protection (2023), *The lives of chickens inside Thailand's factory farms*. [Link](#)

<sup>55</sup> European Commission (2025), EU trade statistics (excluding United Kingdom), HS 0207: Poultry fresh, chilled, frozen. [Link](#)

<sup>56</sup> European Commission, DG SANTE (2018), *Audit Report: Thailand – Poultry Meat – Official Controls*. [Link](#); European Commission, DG SANTE (2019), *Audit Report: Thailand – Poultry Meat – Official Controls*. [Link](#)

<sup>57</sup> European Commission, DG SANTE (2020a), *Audit Report: Thailand – Follow-up Audit on Poultry Meat – Official Controls*. [Link](#)

<sup>58</sup> European Commission, DG SANTE (2020b), *Audit Report: Thailand – Poultry Meat – Animal Health Controls*. [Link](#)

<sup>59</sup> European Commission, DG SANTE (2022), *Audit Report: Thailand – Poultry Meat – Official Controls and Animal Health*. [Link](#)

<sup>60</sup> EUR-Lex (2021), *Animal welfare — protection of chickens kept for meat production*. [Link](#)

<sup>61</sup> Insawake, K., Songserm, T., Songserm, O., Plaiboon, A., Homwong, N., Adeyemi, K., Rassmidatta, K. & Ruangpanit, Y. (2025), *Effects of isoquinoline alkaloids as an alternative to antibiotic on oxidative stress, inflammatory status, and cecal microbiome of broilers under high stocking density*. Poultry Science, 104(1) 104671, ISSN 0032-5791, [Link](#)

<sup>62</sup> CP Foods Worldwide (2017), *CPF's Success Story on Best practice of Animal welfare: Scope of Food Processing and Broiler Integration Industry, Thailand*. [Link](#)

<sup>63</sup> Insawake, K., Songserm, T., Songserm, O., Plaiboon, A., Homwong, N., Adeyemi, K., Rassmidatta, K., Ruangpanit, Y. (2025), *Effects of isoquinoline alkaloids as an alternative to antibiotic on oxidative stress, inflammatory status, and cecal microbiome of broilers under high stocking density*. Poultry Science, 104(1). [Link](#)

<sup>64</sup> European Food Safety Authority (2023), *PLS: Welfare of broilers on farm*. [Link](#)

more than 300 companies and the number is growing, proving that ambitious welfare standards can be good for business. In this context, where necessary, proactive cooperation with Thailand's DLD to potentially amend or adjust the GAP standards for broilers to adhere to potentially more stringent EU standards would be required to both improve chicken welfare and limit impacts on trade.

## 2.1.2 Laying hens

In addition to its poultry meat exports, Thailand is also a producer and exporter of eggs, exporting up to €59 million in 2023 with a population of 52.3 million laying hens producing around 43.4 million eggs per day.<sup>65</sup> However, these egg exports are not currently destined for the EU market and instead cater primarily to neighbouring economies such as Singapore, Hong Kong, Taipei, and Japan,<sup>66</sup> where demand remains strong.

As previously discussed, Thailand's Prevention of Cruelty to Animals and Provision of Animal Welfare Act (2014) does not cover the slaughter of farm animals. Therefore, there is no legal obligation for pre-slaughter stunning, and in practice, many birds are killed without any stunning or through methods that are not reliably humane, raising urgent concerns about animal suffering at the point of slaughter.<sup>67</sup> Stakeholders and a 2023 survey and investigation indicate that in smaller facilities, stun attempts are often inadequate or omitted entirely, which means many birds may be fully conscious at the time of neck-cutting or clubbing.<sup>68</sup> It is estimated that 1.3 billion chickens were slaughtered in 2023,<sup>69</sup> with projections for that number to rise to approximately 2 billion in 2025 as competitiveness and growth of the sector remain strong.<sup>70</sup>

Laying hens are commonly confined to battery cages for the entirety of their productive lives. These cages may hold individual birds or groups of several hens, but in either case, space is severely limited, restricting their ability to move or express natural behaviours. This lifelong confinement

contributes to stress, feather pecking, and unaddressed health problems, including broken bones and chronic injuries.<sup>71</sup> The EU implemented a ban on unenriched battery cages for laying hens in 2012.<sup>72</sup> More recently, the EU has relaunched a call of evidence and citizen feedback to further ban cages as part of the revision of the Animal Welfare legislation.<sup>73</sup> Despite rising awareness of welfare concerns, cage-based production remains widespread due to its efficiency and ease of management. The Thai Department of Livestock Development introduced a cage-free egg production standard in 2020, but uptake remains limited and voluntary.

As the EU advances its revision of animal welfare legislation and seeks to "End the Cage Age," the European Commission has indicated that these higher standards should also extend to imports of animal products.<sup>74</sup> At present, only the EU Slaughter Regulation applies to imported products<sup>75</sup> which significantly limits efforts to improve global animal welfare conditions. The ongoing negotiations for an EU-Thailand FTA present a strategic opportunity to address such concerns, particularly in the poultry sector. However, cooperation should move beyond mere exchanges on legislative frameworks to focus on the effective implementation of such standards, including strengthened monitoring and enforcement mechanisms.

## 2.2 FISHERIES AND AQUACULTURE

In 2024, Thailand ranked ninth in global exports of fishery and aquaculture products after China, Norway, Ecuador, Vietnam, Chile, India, Canada and the Netherlands.<sup>76</sup> By volume, Thailand's fisheries sector is powered 60% by captured fisheries and 40% by aquaculture, though the latter makes up 57% of the sector's produced value.<sup>77</sup>

<sup>65</sup> **Nation Thailand** (7 November 2023), *Thai egg industry cashes in on rising overseas demand*. [Link](#); OEC (2025), *Eggs in Thailand*. [Link](#)

<sup>66</sup> OEC (2023), *Where does Thailand export Eggs to?* (2023). [Link](#)

<sup>67</sup> **World Animal Protection** (2020), *Animal Protection Index: Thailand country report*. [Link](#)

<sup>68</sup> **WEAnimals** (2023), *The lives of chickens inside Thailand's factory farms*. [Link](#)

<sup>69</sup> **Food and Agriculture Organization of the United Nations** (2025) with major processing by **Our World in Data**. *Number of cattle slaughtered for meat – FAO* [dataset]. **Food and Agriculture Organization of the United Nations**, *Production: Crops and livestock products* [original data]. [Link](#)

<sup>70</sup> **Kornboonrits, S.** (2023), *Industry Outlook 2023–2025: Chilled, Frozen and Processed Chicken Industry*. Krungsri Research. [Link](#)

<sup>71</sup> *Ibid.*

<sup>72</sup> **European Commission** (2008), *Animal Welfare: Commission report confirms the potential benefits of banning conventional battery cages for laying hens*. Press release issued on 8 January 2008 in Brussels. [Link](#)

<sup>73</sup> **European Commission** (2025), *On-farm animal welfare for certain animals: modernisation of EU legislation*. [Link](#)

<sup>74</sup> **Eurogroup for Animals** (2025), *Imports: no more double standards for animals?* [Link](#)

<sup>75</sup> **EUR-Lex** (2009), *Council Regulation (EC) No 1099/2009 of 24 September 2009 on the protection of animals at the time of killing* (Text with EEA relevance). [Link](#)

<sup>76</sup> **FAO** (2025), *World Fish trade fall in 2024*. [Link](#)

<sup>77</sup> **Southeast Asian Fisheries Development Center** (2022), *Fisheries Country Profile: Thailand*. [Link](#)

**Table 3:** Production of species from aquaculture by quantity (MT)<sup>78</sup>

| Major species/group | 2021    | 2020    | 2019    | 2018    | 2017    | 2016    | 2015    |
|---------------------|---------|---------|---------|---------|---------|---------|---------|
| Shrimps/prawns      | 387,855 | 421,052 | 428,757 | 406,083 | 381,102 | 342,511 | 310,975 |
| Tilapias            | 253,489 | 206,050 | 228,680 | 216,696 | 218,011 | 208,144 | 205,976 |
| Catfishes           | 105,853 | 112,525 | 110,467 | 120,458 | 117,895 | 131,634 | 133,241 |
| Molluscs            | 98,910  | 119,001 | 88,973  | 78,203  | 98,256  | 197,201 | 194,405 |
| Barramundi          | 47,636  | 45,415  | 47,203  | 39,278  | 20,454  | 17,610  | 17,250  |
| Silver barb         | 24,329  | 20,498  | 21,767  | 23,124  | 23,647  | 30,703  | 30,498  |

## 2.2.1 Aquaculture

Aquaculture production in Thailand is made up of freshwater and brackish water aquaculture. Table 3 presents the production of species from aquaculture from 2015–2021, with the leading freshwater species being tilapia, catfish, barramundi and silver barb, and brackish water species being shrimps, prawns and molluscs. Brackish water aquaculture usually produces high-value products for export.<sup>79</sup> This latter point is made clear by the total value of exported frozen shrimps and prawns compared to frozen tilapias (Tables 4 and 5). In 2024 exports of Thai frozen shrimps and prawns totalled over 376k kg, though Thailand is not a significant exporter to the EU, the main exporters being Ecuador (181 million kg), Argentina (76 million kg), and India (70 million kg).<sup>80</sup> Thailand exported over 156k kg of frozen tilapia to the EU in 2024, ranking fifth after China (12.5 million kg), Vietnam (1.4 million kg), Indonesia (219k kg) and India (210k kg).<sup>81</sup>

**Table 4:** EU imports from Thailand, Frozen other shrimps and prawns<sup>82</sup>

| Country (2024) | Value [€]        | Weight [kg]    |
|----------------|------------------|----------------|
| Italy          | 4.035.566        | 326.720        |
| France         | 228.543          | 24.848         |
| Ireland        | 48.711           | 7.380          |
| Cyprus         | 77.007           | 7.015          |
| Netherlands    | 44.704           | 5.414          |
| Spain          | 20.438           | 4.580          |
| Belgium        | 1.826            | 720            |
| <b>Total</b>   | <b>4.456.795</b> | <b>376.677</b> |

**Table 5:** EU imports from Thailand, Frozen tilapias<sup>83</sup>

| Country (2024) | Value [€]      | Weight [kg]    |
|----------------|----------------|----------------|
| Belgium        | 125.358        | 64.877         |
| Italy          | 122.737        | 59.700         |
| Ireland        | 60.526         | 32.000         |
| <b>Total</b>   | <b>308.621</b> | <b>156.577</b> |

Animal welfare in Thai aquaculture presents unique challenges compared to terrestrial farming due to the fluid nature of aquatic environments and the limited scope of current legislation. Existing animal welfare laws in Thailand offer minimal coverage of aquatic species, as they focus primarily on land animals, with fish not being recognised as sentient beings under national statutes. Welfare concerns in fish farming thus centre on water quality and stocking density. Excessive crowding in tanks or pens can lead to low oxygen levels, high ammonia concentrations, and disease outbreaks. Investigations of Thai tilapia farms have documented unhygienic conditions, including dirty water, floating dead fish, and bacterial infections such as eye inflammation, while footage from markets shows fish suffocating post-harvest.<sup>84</sup> Strong negative correlations have been found between fish density and environmental health indicators like water transparency, feeding behaviour, and swimming activity during capture, all signs of chronic stress and compromised welfare. These conditions not only inflict considerable suffering on individual fish but also undermine farm productivity and increase reliance on antibiotics, further affecting health outcomes for both animals and humans.<sup>85</sup>

As is the case for chickens, the voluntary GAP standards for aquaculture should be a topic of cooperation in the context of the FTA, especially as the EU plans to review its animal welfare legislation.

<sup>78</sup> Southeast Asian Fisheries Development Center (2022), *Fisheries Country Profile: Thailand*. [Link](#)

<sup>79</sup> FAO (2025), Thailand. Text by Pongsri, C. and Sukumasavin, N., In: *Fisheries and Aquaculture*. [Link](#); Southeast Asian Fisheries Development Center (2022), *Fisheries Country Profile: Thailand*. [Link](#)

<sup>80</sup> European Commission (2025), EU trade statistics (excluding United Kingdom), HS 030617 Frozen other shrimps and prawns. [Link](#)

<sup>81</sup> European Commission (2025), EU trade statistics (excluding United Kingdom), HS 030323: Frozen tilapias. [Link](#)

<sup>82</sup> European Commission (2025), EU trade statistics (excluding United Kingdom), HS 030617 Frozen other shrimps and prawns. [Link](#)

<sup>83</sup> European Commission (2025), EU trade statistics (excluding United Kingdom), HS 030323: Frozen tilapias. [Link](#)

<sup>84</sup> Kurokawa, M, with Sinergia Animal & We Animals (2022), *Investigation: thai fish farms and markets*. [Link](#)

<sup>85</sup> Lertwanakarn, T., Purimayata, T., Luengyosluechakul, T., Grimalt, P. B., Pedrazzani, A. S., Quintiliano, M. H., & Surachetpong, W. (2023), *Assessment of Tilapia (Oreochromis spp.) Welfare in the Semi-Intensive and Intensive Culture Systems in Thailand*. *Animals*, 13(15), 2498. [Link](#)

## 2.2.2 Fisheries

Despite this relatively lower global ranking, Thailand (€2.96 bn) is only second after China (€4.34 bn) in global exports of canned fish. It is estimated that Thailand supplies half of the global demand for canned tuna. However, due to overfishing issues in the past, Thailand has resorted to importing raw tuna to be processed and preserved for export.<sup>86</sup> Thailand is also ranked third (€0.57 bn) after China (€4.07 bn) and India (€0.58 bn) in global exports of preserved crustaceans,<sup>87</sup> though similarly, due to the spread of a bacterial agent (Early Mortality Syndrome), Thailand's processed shrimp exports faced challenges and required imports of raw shrimp.<sup>88</sup>

**Table 6:** EU imports from Thailand, Prepared or preserved tuna<sup>89</sup>

| Country (2024) | Value [€]         | Weight [kg]      |
|----------------|-------------------|------------------|
| Germany        | 5.635.972         | 957.387          |
| Greece         | 4.761.113         | 807.069          |
| Finland        | 4.597.411         | 1.007.865        |
| Denmark        | 3.651.652         | 771.693          |
| Netherlands    | 3.595.255         | 838.549          |
| Spain          | 3.550.498         | 739.243          |
| Sweden         | 2.401.531         | 546.147          |
| Italy          | 1.830.187         | 230.123          |
| France         | 661.289           | 163.768          |
| Belgium        | 613.356           | 169.134          |
| Ireland        | 603.174           | 91.174           |
| Romania        | 431.152           | 101.856          |
| Slovenia       | 332.321           | 66.024           |
| Cyprus         | 267.206           | 59.531           |
| Latvia         | 239.393           | 47.544           |
| Lithuania      | 176.671           | 58.608           |
| Poland         | 149.795           | 37.789           |
| Malta          | 121.251           | 29.820           |
| Hungary        | 85.200            | 17.782           |
| Austria        | 82.245            | 38.918           |
| Bulgaria       | 80.111            | 27.218           |
| Estonia        | 70.705            | 28.416           |
| <b>Total</b>   | <b>33.937.488</b> | <b>6.835.658</b> |

The Thai seafood industry took another hit in 2015 when the EU issued a “yellow card” warning, threatening a ban on Thai seafood products due to the country's insufficient action towards tackling illegal, unreported and unregulated (IUU) regulations. After several years of cooperative dialogue and action from the Thai government to improve its laws and regulations, the EU lifted the yellow card in 2019.<sup>90</sup>

Tables 7 and 8 present the major species products from capture fisheries from 2015 to 2021. Despite legislative efforts made to come into compliance with IUU regulations, more recently, political pressure has led to the proposal of several amendments that risk undoing progress previously made in the fisheries sector. These include possible loosening of regulations concerning forced and child labour, permission of night fishing and finer mesh nets, and transferring of catches between boats at sea. This could result in human rights violations, increased damage to marine ecosystems, overfishing and opaque trade of illegal catch.<sup>91</sup> As of April 2025, it appears that the proposed fisheries reform has been stalled in the Thai Parliament.<sup>92</sup>

Another fisheries issue concerns the invasive species, the Blackchin tilapia, which has now spread to 19 provinces in central Thailand, impacting local ecosystems. The Thai agri-food giant CP Foods was suspected of importing the species for research in 2010 and allegedly botching the disposal of the species after their research failed. With few natural predators and minimal ongoing containment efforts, the species has rapidly established itself in several provinces, outcompeting native fish for food and disrupting local ecosystems.<sup>93</sup>

<sup>86</sup> MICE Intelligence & Innovation (2018), *Thailand's seafood industry*. [Link](#)

<sup>87</sup> Data extracted from UN Comtrade data base with HS codes 1604 and 1605. [Link](#)

<sup>88</sup> MICE Intelligence & Innovation (2018), *Thailand's seafood industry*. [Link](#)

<sup>89</sup> European Commission (2025), EU trade statistics (excluding United Kingdom), HS 160414 Prepared or preserved tuna. [Link](#)

<sup>90</sup> European Commission (8 January 2019), *Commission lifts “yellow card” from Thailand for its actions against illegal fishing*. Press release. [Link](#)

<sup>91</sup> Roney, T. (27 February 2025), *Thailand 'bringing back the bad old days' for fisheries, say activists*. Dialogue Earth. [Link](#)

<sup>92</sup> Dao, T. (2 April 2025), *Bill that would roll back Thailand's fisheries reforms stalls in parliament, set to undergo further consideration*. SeafoodSource. [Link](#)

<sup>93</sup> Wipatayotin, A. (17 January 2025), *Invasive blackchin tilapia spreading again in Thailand*. Bangkok Post. [Link](#)

**Table 7:** Production of species from marine capture fisheries by quantity (MT)<sup>94</sup>

| Major species/group | 2021    | 2020    | 2019    | 2018    | 2017    | 2016    | 2015    |
|---------------------|---------|---------|---------|---------|---------|---------|---------|
| Anchovies           | 130,681 | 141,599 | 143,218 | 130,891 | 120,809 | 129,608 | 102,108 |
| Scads               | 95,980  | 97,396  | 103,423 | 104,443 | 109,512 | 121,137 | 89,365  |
| Squids              | 92,307  | 86,548  | 98,375  | 111,241 | 98,093  | 108,988 | 90,987  |
| Sardinellas         | 55,775  | 57,435  | 91,989  | 71,463  | 72,096  | 72,729  | 81,051  |
| Mackerels           | 89,127  | 79,844  | 86,879  | 72,441  | 74,276  | 81,017  | 116,913 |
| Shrimps/prawns      | 52,858  | 56,586  | 60,954  | 48,790  | 33,051  | 42,453  | 33,447  |
| Carangids           | 52,095  | 52,087  | 57,053  | 73,617  | 96,928  | 67,988  | 50,790  |
| Crabs               | 45,334  | 48,071  | 50,950  | 32,662  | 35,884  | 36,064  | 23,874  |
| Tunas               | 54,253  | 54,099  | 46,397  | 43,718  | 45,459  | 39,849  | 42,539  |
| Threadfin breams    | 40,317  | 31,351  | 40,185  | 35,996  | 31,584  | 31,318  | 36,868  |

**Table 8:** Production of species from inland capture fisheries by quantity (MT)<sup>95</sup>

| Major species/group | 2021   | 2020   | 2019   | 2018   | 2017   | 2016   | 2015   |
|---------------------|--------|--------|--------|--------|--------|--------|--------|
| Silver barb         | 20,536 | 20,969 | 21,907 | 24,858 | 30,870 | 21,300 | 21,049 |
| Tilapias            | 16,177 | 17,280 | 17,359 | 19,920 | 19,869 | 20,700 | 20,469 |
| Catfishes           | 8,603  | 9,553  | 9,389  | 11,294 | 14,647 | 13,600 | 13,346 |
| Snakeheads          | 7,098  | 9,204  | 7,937  | 12,003 | 14,471 | 16,100 | 15,013 |
| Crustaceans         | 1,148  | 1,317  | 1,456  | 1,226  | 611    | –      | –      |
| Climbing perch      | 330    | 4,507  | 4,029  | 4,875  | 7,920  | 7,900  | 7,848  |

## 2.3

### PIGS AND BREEDING SOWS

Pig rearing plays a comparatively smaller role in Thailand's livestock sector, with approximately 12 million pigs slaughtered in 2023, a stark contrast to the 1.3 billion broiler chickens processed that same year.<sup>96</sup> Comparatively, Thai per capita annual consumption of pork totals 13 kg, two kilograms more than poultry.<sup>97</sup> Despite its smaller agricultural scale, pig meat production supplies both domestic and foreign markets with export destinations including neighbouring countries such as Hong Kong, Malaysia, and Myanmar. In 2023, exports to these destinations were valued at around 10 million euros.<sup>98</sup> In contrast, the European Union currently represents a negligible market for Thai pig meat, with imports totalling about 127,000 euros in the same year, the equivalent of almost 46,000 kg (see Table 9). However, this trade dynamic could shift if favourable market access provisions are secured under the proposed EU-

Thailand FTA, potentially opening up new export opportunities for Thai pork producers.

**Table 9:** EU imports from Thailand, Meat of swine, fresh, chilled or frozen<sup>99</sup>

| Country (2024) | Value [€]      | Weight [kg]    |
|----------------|----------------|----------------|
| Belgium        | 125.358        | 64.877         |
| Italy          | 122.737        | 59.700         |
| Ireland        | 60.526         | 32.000         |
| <b>Total</b>   | <b>308.621</b> | <b>156.577</b> |

As previously discussed, in practice Thailand's Prevention of Animal Cruelty and Provision of Animal Welfare Act lacks stringent and enforceable rules for farm animals, excluding chickens. As a result, welfare conditions for pigs are primarily reliant on the GAP for pig farms (TAS 6403-2565). Fortunately, in 2023 the DLD made the GAP mandatory for pig farms exceeding 500 pigs.<sup>100</sup>

<sup>94</sup> Southeast Asian Fisheries Development Center (2022), *Fisheries Country Profile: Thailand*. [Link](#)

<sup>95</sup> *Ibid.*

<sup>96</sup> Food and Agriculture Organization of the United Nations (2025) with major processing by Our World in Data. *Number of cattle slaughtered for meat – FAO* [dataset]. Food and Agriculture Organization of the United Nations- "Production: Crops and livestock products [original data]. [Link](#)

<sup>97</sup> Food and Agriculture Organization of the United Nations (2024) – processed by Our World in Data. *Yearly per capita supply of poultry meat* [dataset]. Food and Agriculture Organization of the United Nations. *Food Balances: Food Balances (-2013, old methodology and population); Food and Agriculture Organization of the United Nations. Food Balances: Food Balances (2010-) [original data]. [Link](#)*

<sup>98</sup> OEC (2023), *Where does Thailand export Pig Meat to?* (2023). [Link](#)

<sup>99</sup> European Commission (2025), EU trade statistics (excluding United Kingdom), *HS 0203 Meat of swine, fresh, chilled or frozen*. [Link](#)

<sup>100</sup> Siam Water Flame (2023), *Ministerial Regulations for GAP standards for pig farms*. [Link](#)



Pig welfare concerns on Thai farms cover the span of a pig's life. From birth, narrow gestation crates are still widely used in Thailand to restrict movement from breeding sows during their 16-week-long gestational period. Sows are usually housed indoors throughout their lives and give birth to about 2.5 litters per year, for roughly two to three years. Once born, piglets are prematurely weaned and removed from their mothers at 3 to 4 weeks instead of the natural 17-week period and then placed in pens with other piglets. Here, their tails and teeth are clipped, and others are done without pain medications, to mitigate injuries from piglets' instinct urges to suckle and chew.<sup>101</sup> Pigs are also often transported to markets in narrow single cages, packed next to and on top of each other. Especially, in Thailand hot climate, heat stress is a prominent issue during transport especially if trucks have limited ventilation capacity.<sup>102</sup> Though stunning methods are more common in larger slaughterhouses, small to mid-sized slaughterhouses either do not use stunning methods or revert to clubbing before slaughter (unsuccessfully stunning the animal).<sup>103</sup>

Compared with the EU, Thai pig welfare standards remain lower. In Thailand, gestation crates are still commonly used for the sow's entire pregnancy, severely restricting movement and natural behaviour. In contrast, the EU banned continuous confinement in 2013: sows may only be kept in crates for the first four weeks after insemination, after which they must be housed in groups. Yet group housing in the EU often provides

only minimal floor space, frequently on barren slatted floors that offer little comfort or stimulation. Major Thai agri-food producers Betagro and CP Foods pledged to phase out the use of these crates by 2025 in Thailand and 2028 for international operations.<sup>104</sup> Although there is no confirmed evidence that the 2025 phase-out has commenced, animal welfare stakeholders report that some companies have taken steps to improve conditions beyond the minimum legal requirements.

Enrichment is another point of divergence. Thai regulations do not systematically require access to rooting or nesting materials, whereas EU law obliges that pigs receive "sufficient quantity of material" to satisfy their behavioural needs. In practice, however, many EU farms meet this requirement with little more than chains or hard plastic objects, which are still inadequate. Moreover, in Thailand, there are no robust legal safeguards against routine mutilations. In the EU, tail docking, tooth clipping, and surgical castration are legally restricted to exceptional cases, yet they remain widespread in practice. Castration is still often performed without anaesthesia or lasting pain relief.

In parallel, the EU's planned revision of its animal welfare legislation, which is expected to include a ban on cages, provides a window of opportunity for further cooperation under the FTA. Such collaboration could help deliver more substantial and lasting improvements in animal welfare over the long term.

<sup>101</sup> **Farm Animal Welfare Matters** (2025), *Industrial Animal Agriculture & Farmed Animals' Welfare*. [Link](#)

<sup>102</sup> **Na-Lampang, P.** (2013), *Effects of methods of confinement during transportation of market pigs on their behavior, stress and injury*. *Songklanakarin Journal of Science and Technology*, 35(2), 137–141. [Link](#)

<sup>103</sup> **McArthur, J.** (2019), *An expose on animal clubbing at Thai slaughterhouses*. [Link](#)

<sup>104</sup> **World Animal Protection** (2018), *A win for pigs: one of the world's largest pork producers commits to better welfare for mother pigs*. [Link](#)

# 3.

## WILDLIFE CONSERVATION AND WELFARE ISSUES



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**This section discusses welfare and biodiversity issues of wildlife in Thailand, specifically illegal wildlife trade, and the roles of the tourism sector and deforestation in threatening wildlife livelihoods. Thailand is a signatory to the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) since 1983 and has enacted several national laws to regulate wildlife trade.**

Wildlife is protected under the *Wild Animal Reservation and Protection Act B.E. 2535 (1992) (WARPA)*, which regulates native species and is overseen by the Department of National Parks, Wildlife and Plant Conservation (DNP). Its latest instalment, the *Wildlife Conservation and Protection Act B.E. 2562 (2019)*, creates five categories of wildlife: preserved, protected, controlled, and dangerous wildlife, and wildlife carcasses.<sup>105</sup> The 2019 Act introduces stricter penalties for wildlife crime, prohibits illegal online trade and expands legal protections to include non-native CITES-listed species. However, as the WARPA is currently set up, the DNP's role focuses on permits and conservation and not the welfare of wild animals.

The welfare of captive wildlife such as elephants, tigers, lions, and exotic pets falls under the *Prevention of Animal Cruelty and Animal Welfare Provision Act, B.E. 2557* and thus the remit of the DLD. In practice, the DLD's role focuses more on improving production standards and safety for farm animals and enforcing anti-cruelty laws for companion animals such as dogs and cats. In this opaque distinction of competences between the DNP and the DLD, the monitoring and enforcement of welfare standards for captive wildlife remains limited.

<sup>105</sup> FAOLEX Database (2024), *Thailand - Wildlife Conservation and Protection Act, B.E. 2562 (2019)*. [Link](#)

## 3.1 PREVALENCE OF (ILLEGAL) WILDLIFE TRADE

As a recognised biodiversity hotspot, Thailand is one of the most biodiverse countries in Southeast Asia, containing approximately 8% of the world's flora and fauna, of which 10% are endemic to Thailand.<sup>106</sup> About 23% of its land and marine areas are designated protected areas. According to the IUCN Red List of Threatened Species, Thailand hosts 575 globally threatened species, and 1,058 nationally threatened species according to the Thai Red List. Examples of threatened species include the Indochinese tiger (*Panthera tigris corbetti*), with an estimated wild population of less than 250 individuals<sup>107</sup> and Irrawaddy dolphins (*Orcaella brevirostris*), whose population keeps decreasing.

Both illegal and legal wildlife trade pose a significant threat to biodiversity, contributing to habitat degradation, population decline, and the potential extinction of vulnerable species. Wildlife parts are traded for four main reasons in Thailand: consumption as food or medicine, spiritual reasons, jewellery and decoration, and pet ownership.<sup>108</sup> Records by TRAFFIC (2010-2019) show that the most trafficked species in Thailand include elephants, tigers, pangolins, and rhinos, sold either whole (dead or alive) or in parts. Thailand serves as a key transit hub in the international pangolin trade: live pangolins and scales often pass through the country en route to destinations such as Laos and China, with only a small portion remaining in Thailand.<sup>109</sup> Thailand has been the country with the most exports seized at the EU level since 2020, according to TRAFFIC, with most of them being cacti extract for medicinal use.<sup>110</sup>

Thailand's ivory market is of particular concern when it comes to both legal and illegal wildlife trade. In a 2014 CITES meeting, government representatives voted to implement trade sanctions on Thailand if the government did not take serious action to halt its trade in illegal elephant tusks by March 2015.<sup>111</sup> In response, the National Ivory Action Plan (2013) was revised in 2014, and the Elephant Ivory Tusk Act B.E. 2558 (2015) was passed, which requires traders to register

their supply of ivory<sup>112</sup> and obtain permits for trading ivory from domesticated, in other words, non-wild Asian elephants, usually in private ownership.

Wild Asian and African elephants and their derivatives are now fully protected under this law. Ivory-related laws prohibit the trade of ivory at the international level but allow domestic trade of ivory from domesticated elephants through a permit system. Recent TRAFFIC (2019) surveys have recorded ongoing ivory trade activity across at least nine provinces, including Bangkok, Chiang Mai, Phuket, and Ayutthaya, reporting 7,341 ivory products and 6,381 elephant parts traded in 150 outlets.<sup>113</sup>

Under the Draught Animal Act of 1939, only domesticated elephants – those registered and born in captivity – can be legally owned and traded.<sup>114</sup> However, this distinction between wild and domesticated elephants creates a regulatory loophole. In practice, wild elephants may be captured and then falsely registered as domesticated individuals through forged documentation or by exploiting gaps in enforcement and verification processes. Once registered, these elephants can legally be kept in private ownership or traded within the country. This legal ambiguity complicates conservation and enforcement efforts, particularly in distinguishing the origins of individual elephants and ensuring compliance with wildlife protection laws. Regardless of legal classification, captive-born elephants retain complex natural behaviours and needs that are rarely met in private ownership, raising serious welfare concerns.

Within Thailand, the Chatuchak Market in Bangkok is a major ground for pet trafficking. This includes birds, tortoises, freshwater turtles, other reptiles and small mammals. For instance, Zebra Dove (*Geopelia striata*) and Red-whiskered Bulbul (*Pycnonotus jocosus*) were the most prevalent species, both are common species found in singing competitions.<sup>115</sup> Monitoring of online platforms such as Facebook has shown that a significant proportion of the wildlife trade in Thailand has shifted online.<sup>116</sup> This involves legal and illegal trade of both native and non-native species.<sup>117</sup>

<sup>106</sup> CBD (2025), *Thailand – Country Profile*. [Link](#)

<sup>107</sup> Pakpien, S. et al. (2025), *A low-density yet stable population of Indochinese tigers (Panthera tigris corbetti) may be the key to recovery in a half-empty landscape in eastern Thailand*, *Biological Conservation*, 304, p. 111043. [Link](#)

<sup>108</sup> TRAFFIC (2020), *Situation Analysis: Illegal wildlife trade and consumer demand reduction efforts in Thailand*. [Link](#)

<sup>109</sup> *Ibid.*

<sup>110</sup> TRAFFIC (2025), *Overview of Seizures of CITES-listed wildlife in the European Union January to December 2023*.

<sup>111</sup> TRAFFIC (2014), *Thailand must address illegal ivory trade or could face sanctions: CITES*. [Link](#)

<sup>112</sup> World Animal Protection (2020), *Animal Protection Index (API) 2020 – Kingdom of Thailand: ranking D*. [Link](#)

<sup>113</sup> TRAFFIC (2020), *Situation Analysis: Illegal wildlife trade and consumer demand reduction efforts in Thailand*. [Link](#)

<sup>114</sup> Chaitae, A., Gordon, I. J., Addison, J., & Marsh, H. (2022), *Protection of elephants and sustainable use of ivory in Thailand*. *Oryx*, 56(4), 601–608. [Link](#)

<sup>115</sup> Chng, S. C. L., & Eaton, J. A. (2016), *Snapshot of an on-going trade: An inventory of birds for sale in Chatuchak weekend market, Bangkok, Thailand*. [Link](#)

<sup>116</sup> Phassaraudomsak, M., & Krishnasamy, K. (2018), *Trading Faces: A rapid assessment on the use of Facebook to trade in wildlife in Thailand*. TRAFFIC, Petaling Jaya, Selangor, Malaysia. [Link](#)

<sup>117</sup> Siriwat, P. (2020), *Wildlife Trade in the Digital Age: The Role of the Internet in Monitoring the Trade in Wild Plants and Animals in Thailand* [Doctoral dissertation]. Oxford Brookes University. [Link](#)



## 3.2

### ROLE OF THE TOURISM SECTOR

The tourism sector is a major contributor to Thailand's economy. According to the Bank of Thailand, tourism accounts for approximately 11% of the country's GDP and supports around 20% of total employment.<sup>118</sup> Thailand is also considered the epicentre of elephant tourism, as noted by the Tourism Authority of Thailand.<sup>119</sup> Captive elephants are featured in a range of tourist activities, including feeding, bathing, riding, and close-up observation. Once captive, the calves undergo a process called Phajaan ("breaking the elephant's spirit").<sup>120</sup> The animal is restrained, starved, and heavily abused until apathetic. In 2017, it was estimated that around 2,700 elephants were working across 250 tourist venues nationwide.<sup>121</sup>

In addition to elephants, tigers have become a prominent part of Thailand's wild animal tourism industry. Over the past two decades, the number of captive tigers in the country has grown significantly, now exceeding the number of tigers in the wild.<sup>122</sup> Tigers are held in private venues, public zoos and tiger farms. Common tourist interactions include circus-style performances, photo opportunities with adult tigers or cubs, and bottle-feeding cubs.<sup>123</sup> Thailand's wild animal tourism also extends to a variety of other activities, such as snorkelling with marine life, monkey performances, and exotic bird shows.

<sup>118</sup> Bank of Thailand (2021), *Revitalising Thailand's tourism sector*. [Link](#)

<sup>119</sup> Bansiddhi, P., Brown, J. L., & Thitaram, C. (2020), *Welfare Assessment and Activities of Captive Elephants in Thailand*. *Animals*, 10(6), Article 6. [Link](#)

<sup>120</sup> Turesson, V. (2014, November 13), *On the back of an Asian elephant (Elephas maximus) – the backside of the elephant tourism with focus on welfare [M2]*. SLU/Dept. of Animal Environment and Health (until 231231). [Link](#)

<sup>121</sup> Bansiddhi, P., Brown, J. L., Thitaram, C., Punyapornwithaya, V., & Nganvongpanit, K. (2019), *Elephant Tourism in Thailand: A Review of Animal Welfare Practices and Needs*. *Journal of Applied Animal Welfare Science*: Vol 23, No 2. (n.d.), retrieved 2 July 2025. [Link](#)

<sup>122</sup> Erzinçlioğlu, T. S., Groves, G., & Ward, S. (2024), *An Analysis of Welfare Standards Within Tiger (Panthera tigris) Facilities in Thailand*. *Zoo Biology*, 43(6), 545–555. [Link](#)

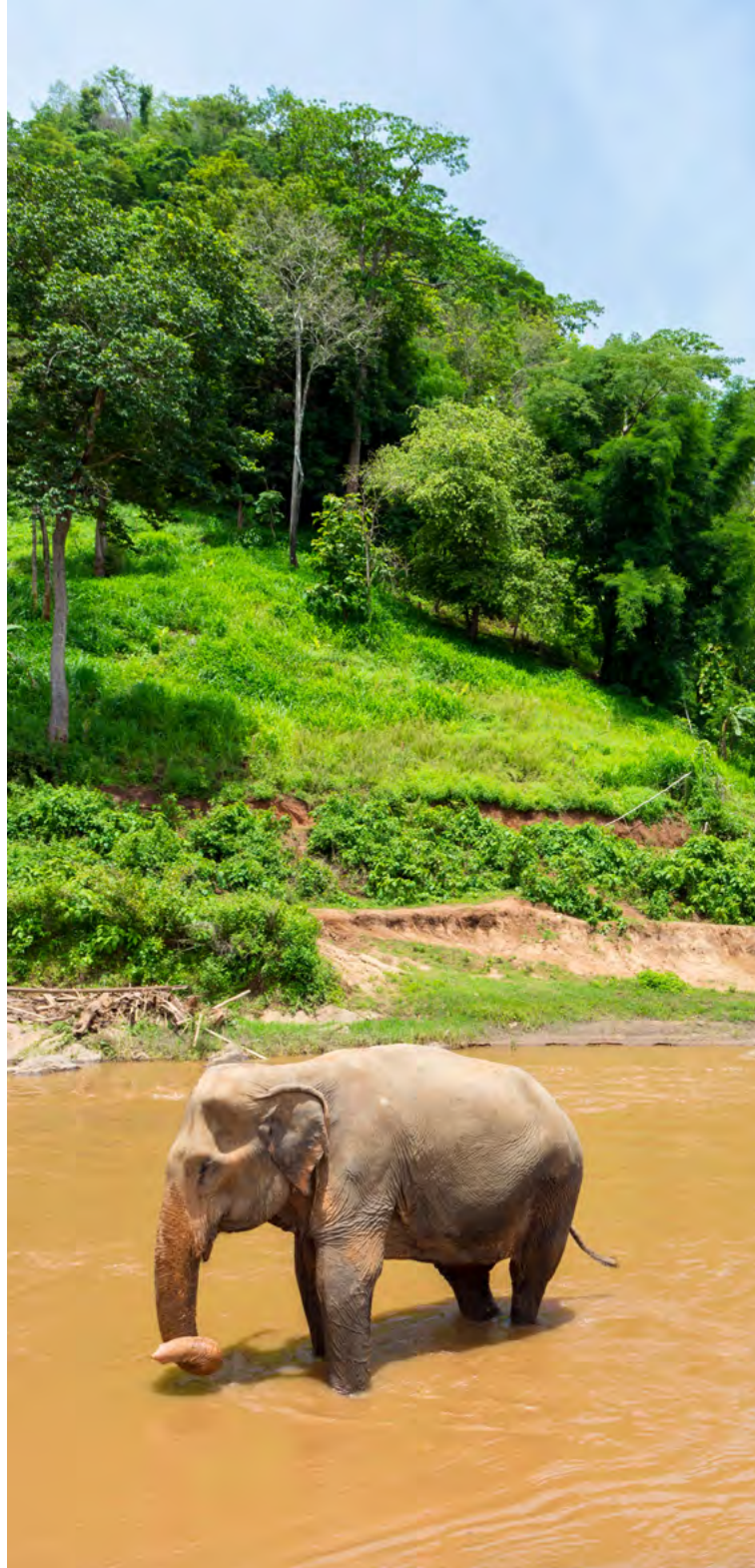
<sup>123</sup> *Ibid.*

### 3.3

#### ROLE OF DEFORESTATION IN THREATENING ENDANGERED SPECIES

Deforestation remains a major threat to biodiversity in Thailand. Forest cover declined drastically from 53% of the total land area in 1960 to 26% by 1995.<sup>124</sup> Although deforestation rates have slowed in recent decades, Global Forest Watch reports that Thailand still experienced a 13% loss (excluding net gain of forest cover) in forest cover between 2001 and 2024.<sup>125</sup> As of 2024, natural forests cover about one-third of the country's total land area. This continued forest loss has contributed to significant declines in wild flora and fauna populations, many of which are endangered species. Additionally, habitat fragmentation has led to increased human-wild animal conflicts, particularly involving wild elephants. Over the past decade, 341 incidents have been reported, resulting in human and elephant casualties as well as property damage.<sup>126</sup>

A key driver of continued forest loss in Thailand is the conversion of land to permanent agriculture, ranging from large-scale agriculture to small-scale shifting agriculture.<sup>127</sup> According to the FAO, most farms are held as small, family-owned operations.<sup>128</sup> These farms primarily grow monoculture crops such as maize, cassava, palm oil and rubber crops, mostly cultivated on deforested land. Rubber, in particular, plays a significant role as Thailand produces around one-third of the global rubber production, with most harvesting occurring in the south. Approximately 90% of Thai rubber is produced by smallholders (1.68 million farms).<sup>129</sup> However, as land availability becomes increasingly scarce in the south, rubber cultivation is expanding into the northeast, posing a significant threat to the region's natural forests.<sup>130</sup> As such, Thailand will inevitably face new requirements put in place by the EU's Deforestation Regulation, which entered into force in June 2023.<sup>131</sup> Still, Thailand is classified as a low-risk country by the European Commission,<sup>132</sup> meaning while its producers will be required to perform proper due diligence, they will be subject to fewer checks compared to countries classed as medium and high risk.



<sup>124</sup> Kalyawongsa, S., Amano, M., Pragtong, K., Lakhaviwattanakul, T., Noochdumron, A., Kuboyama, H. & Oka, H. (1997), *Historical Changes of Forest Area in Thailand: A Case Study of Mae Klong Watershed Research Station-Lintin, Kanchanaburi*. Journal of Forest Planning, 3(2), pp.65–72.

<sup>125</sup> Global Forest Watch (n.d.) *Thailand – Forest change*. [Link](#)

<sup>126</sup> Supanta, J. et al. (2025), *Human–Elephant Conflict in Thailand over the Past Decade (2014–2023): Occurrence, Geographical Distribution, and Temporal Trends*, Animals, 15(9), p. 1304. [Link](#)

<sup>127</sup> Global Forest Watch (n.d.) *Thailand – Forest change*. [Link](#)

<sup>128</sup> FAO (2025), *Family Farming Knowledge Platform – Thailand*. [Link](#)

<sup>129</sup> European Forest Institute (2024), *Briefing — Thailand's natural rubber producers are preparing for new market requirements*. [Link](#)

<sup>130</sup> Wang, Y. et al. (2023), *High-resolution maps show that rubber causes substantial deforestation*. Nature, 623(7986), pp. 340–346. [Link](#)

<sup>131</sup> Regulation (EU) 2023/1115 of the European Parliament and of the Council of 31 May 2023 on the making available on the Union market and the export from the Union of certain commodities and products associated with deforestation and forest degradation and repealing Regulation (EU) No 995/2010. [Link](#)

<sup>132</sup> European Commission (n.d.), *Country Classification List*. [Link](#)

# 4.

## DEMANDS FOR FTA NEGOTIATIONS



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The EU-Thailand FTA aims to liberalise trade in goods and services between the partners. Typically, under the most ambitious scenarios, the EU does not fully liberalise trade in agri-food products, maintaining import quotas such as those currently in place for Thailand on rice and poultry. Table 10 below presents the quota volume and requested quantity by Thai exporters in the quota period 2024/2025 of the two largest quotas for chicken preparations.<sup>133</sup>

Thai exports of chicken preparations are reaching or have exceeded current quota volumes. The negotiation of an FTA between the EU and Thailand will likely grant the country a more favourable quota volume or tariff rate quota (TRQ). This would inevitably lead to increased imports of poultry products from Thailand, the production of which lacks adequate care and due diligence for the welfare of the animals in question.

**Table 10:** Quota volume and allocation rate of chicken preparations from Thailand (Quota period 2024/2025)

| Order number | Quota volume | Requested quantity | Quota allocation |
|--------------|--------------|--------------------|------------------|
| 09.4212      | 81,968 t     | 62,409 t           | 76.14%           |
| 09.4215      | 53,866 t     | 85,051 t           | 100%             |

The negotiation of trade agreements provides an opportunity to more closely cooperate with other nations on levels of protection, both for animals and the environment. Specifically, the EU is in the process of revising its animal welfare legislation, indicating that these higher standards should also extend to imports of animal products<sup>134</sup> as currently only the EU Slaughter Regulation applies to imported animal products.<sup>135</sup> Thus, leveraging market access and harnessing trade negotiations with Thailand for meaningful cooperation could guarantee both smooth future trade flows and improved animal welfare conditions. Moreover, Thai stakeholders welcome the negotiations with the EU in the hope that new market opportunities could lead to a more widespread improvement of animal welfare conditions in the country. With that in mind, the following sections outline some recommendations for the potential future FTA's Sustainable Food Systems (SFS) chapter and the chapter on Trade and Sustainable Development (TSD).

<sup>133</sup> European Commission (2025), *TRQ allocation coefficients*. [Link](#)

<sup>134</sup> Eurogroup for Animals (2025), *Imports: no more double standards for animals?* [Link](#)

<sup>135</sup> EUR-Lex (2009), Council Regulation (EC) No 1099/2009 of 24 September 2009 on the protection of animals at the time of killing (Text with EEA relevance). [Link](#)

## 4.1

### CHAPTER ON SUSTAINABLE FOOD SYSTEMS AND ANIMAL WELFARE

The Sustainable Food Systems (SFS) Chapter is a relatively new addition to EU FTAs, with its first appearance in the EU-New Zealand FTA, followed by the EU-Chile Interim Trade Agreement, both of which entered into force on 1 May 2024<sup>136</sup> and 1 February 2025.<sup>137</sup> The EU-New Zealand FTA features a separate chapter on Animal Welfare (Chapter 8) while the EU-Chile agreement houses its animal welfare provisions in an Article within the SFS Chapter. This Chapter aims to promote bilateral cooperation between trade partners to improve the sustainability and resilience of their respective food systems. Both agreements establish (sub-)Committees on SFS and can establish dedicated Working Groups on Animal Welfare and Anti-Microbial Resistance (AMR). Yet, due to the cooperative language used in these Chapters, these provisions remain non-binding and thus difficult to enforce.<sup>138</sup>

Nonetheless, the inclusion of a Chapter on SFS and Animal Welfare not only signals positive prospects for improving current food systems but also supports the creation of dedicated spaces for cooperation and dialogue to further this objective. In the context of the EU-Thailand FTA negotiations, the European Commission has put forward a proposal for a legal text on SFS, which includes Articles on Animal Welfare and AMR.<sup>139</sup> Compared to the final negotiated text in the EU-New Zealand and EU-Chile agreements, the proposed text for the EU-Thailand SFS Chapter puts forward appears aligned with the text in the existing FTAs; however, the proposed text is less specific at this stage of the negotiations.

In light of Thailand's existing animal welfare legislation and the forthcoming revision of the EU's Animal Welfare legislation, the Parties should seek to formalise actionable cooperation on SFS and animal welfare within the FTA. This could be achieved by mandating the creation of dedicated committees or working groups to address these issues. The FTA should also specify a clear timeframe for their establishment and set minimum meeting frequencies once the agreement enters into force. The Commission should also seek to include the explicit recognition of animal sentience, even for chickens and fish, as well as language committed to tackling cruel transport and slaughter methods, including on humane stunning methods.

Finally, the aquaculture animal welfare issues are underdefined in the SFS Chapter, as it could be considered an overlap with the Article on the Sustainable Management of Fisheries and Aquaculture, typically housed in the TSD Chapter. Therefore, the EU-Thailand FTA Chapter on SFS and Animal Welfare should specify the application of the animal welfare provisions to aquatic animals as well as recognition of the World Organisation of Animal Health standards for aquatic animals.

## 4.2

### CHAPTER ON TRADE AND SUSTAINABLE DEVELOPMENT

The TSD Chapter houses articles related to labour and environmental commitments made by the trade partners. This includes provisions on their respective rights to regulate and the applied level of protection, commitments to multilateral labour and environmental agreements, pledges for bilateral cooperation on labour and environment topics, as well as individual articles dedicated to specific environmental areas.

The European Commission has published its proposal for a TSD Chapter,<sup>140</sup> which is similar to the Chapter on SFS, includes standard TSD Articles, but in a less detailed state as compared to the EU-New Zealand and EU-Chile agreements. As a standard of good practice, the Commission should ensure it negotiates articles to strengthen public participation and cooperative activities, including a balanced representation of stakeholders working on sustainability-related issues.

In the context of this report, the following section discusses the relevance of the inclusion of strong environmental provisions under the Articles on (i) Sustainable Management of Fisheries and Aquaculture, (ii) Biodiversity & Wild Flora and Fauna, and Forests. The TSD Chapter often splits up Articles on Biodiversity, Wild Fauna and Flora, and Forests into three separate articles. Considering their overlap regarding animal welfare, biodiversity loss and deforestation, this section puts forward recommendations to be taken up within these Articles.

<sup>136</sup> European Commission (2023), *EU-New Zealand: Text of the Agreement*. [Link](#)

<sup>137</sup> European Commission (2023), *EU-Chile: Text of the Agreement*. [Link](#)

<sup>138</sup> Blot, E., Sgarbi, F. and Oger, A. (2023), *Reconciling agricultural and sustainability objectives in the EU-New Zealand FTA*. Institute for European Environmental Policy. [Link](#)

<sup>139</sup> European Commission (2025), *EU-Thailand agreement: Documents*. [Link](#)

<sup>140</sup> European Commission (2025), *EU-Thailand agreement: Documents*. [Link](#)



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### 4.2.1 Sustainable Management of Fisheries and Aquaculture

As discussed under section 2.2, Thailand has previously faced several sustainability issues in its fisheries sector, such as the accidental introduction of the invasive Blackchin tilapia and overfishing, leaving the country reliant on imports of raw tuna to produce its major export product, canned tuna. In the past, the EU's "yellow card" warning Thailand of its IUU fishing practices, along with cooperative dialogues, were successful in spurring governmental action to reform its fisheries sector. Yet, recent proposals for reform in the sector risk undoing progress previously made in the sector.

In this context, in addition to the Parties effectively implementing measures to combat IUU fishing, the Parties should explicitly seek to operate a fisheries management system to prevent overfishing and overcapacity, promote recovery of overfished stocks, and minimise by-catch of non-target species.

Concerning aquaculture, though the topic of animal welfare is considered more complex, poor hygiene and high-density tanks are an inadequate quality of life for fish and should be more systematically tackled. As mentioned above, there is an overlap between the articles on the Sustainable Management of Fisheries and Aquaculture and Animal Welfare. Therefore, the provisions on promoting sustainable aquaculture and trade in fish and seafood from aquaculture should explicitly recognise and strive to implement World Organisation of Animal Health standards for aquatic animals, as well as the Kunming-Montreal Global Biodiversity Framework (GBF) targets related to marine ecosystems.

### 4.2.2 Biodiversity, Wild Flora and Fauna and Forests

Thailand, home to around 8% of the world's flora and fauna, faces significant biodiversity threats from illegal wildlife trade, tourism, and deforestation. Despite national laws and CITES membership, it remains a hub for wildlife trafficking and a key transit point in global trade. Loopholes, such as the distinction between wild and domesticated elephants, enable laundering of illegally captured animals, while the shift to online markets makes enforcement harder. Oversight of captive wildlife is weak due to unclear responsibilities between agencies. Tourism further compounds these challenges with some 2,700 captive elephants and numerous tigers exploited for entertainment and subjected to abusive practices. Deforestation, driven largely by agriculture, has drastically reduced forest cover and intensified human-wildlife conflict. Rubber and monoculture crop expansion continue to destroy habitats, further threatening Thailand's rich biodiversity.

At a minimum, the Parties should effectively implement both the CITES and the Convention on Biological Diversity (CBD) and at minimum strive to achieve GBF targets such as the reduction of biodiversity loss, promotion of ecosystem restoration and conservation, minimisation of human-wildlife conflicts, and the sustainable and legal harvesting and trade of wild species.<sup>141</sup>

Regarding wildlife trade, the Commission should engage with Thailand on the topic of regulatory gaps currently allowing for the domestic trade in elephant tusks and exotic pet trafficking. Moreover, domestic laws permitting the domestication of wild animals for private or professional use, including in tourism, should be phased out.

On deforestation, the Article on Trade and Forests will likely include provisions to promote the conservation and sustainable management of forests and timber products and implement measures to combat illegal logging. It should also include provisions on implementing measures and cooperation to minimise commodity-driven deforestation and forest degradation. Cooperative dialogue on commodity-driven deforestation would ideally improve biodiversity outcomes in Thailand while mitigating the potential negative impacts of the EUDR.

<sup>141</sup> CBD (2024), *2030 Targets (with Guidance Notes)*. [Link](#)

# 5.

## CONCLUSION



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In 2023, the EU relaunched negotiations for a trade agreement with Thailand. While the EU's imports from Thailand are dominated by manufactured goods such as machinery and transport equipment, agri-food products account for around 11% of total imports. Thailand is a major global producer of preserved and prepared chicken, canned tuna, frozen shrimp, and pig meat. Currently, preserved and prepared chicken represents one-fifth of EU agri-food imports from Thailand, and a trade agreement could potentially increase import quotas for this sector as well as for other agri-food products.

Against this backdrop, and in light of the EU's forthcoming revision of its animal welfare legislation, the negotiations present an opportunity to strengthen EU-Thailand cooperation on animal welfare for both farmed and wild animals. Although Thailand introduced the Prevention of Animal Cruelty and Animal Welfare Provision Act in 2014, gaps in regulation and enforcement continue to hinder its effective implementation. Export-oriented producers, such as those complying with the

voluntary Good Agricultural Practices standards for broiler chicken (TAS 6901-2009), which are broadly aligned with EU requirements, do meet higher welfare conditions than producers serving the domestic market. Nevertheless, serious concerns remain regarding the welfare of poultry, pigs, and fish, particularly those not destined for export.

Beyond farm animal welfare, an agreement could also provide a platform for closer cooperation on related sustainability challenges, including combating IUU fishing, tackling illegal wildlife trade, preventing deforestation, and addressing the exploitation of captive wildlife for economic purposes.



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