

## Opening the EU market to Indonesia, the Indian ocean's largest tuna fleet: at what cost?

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The draft EU–Indonesia agreement<sup>1</sup>, which has just been published by the European Commission, provides preferential market access for tuna. Fresh and frozen tuna fillets would be fully liberalised with 0% duty from entry into force and no quota, while processed tuna products are subject to tariff-rate quotas: 5,000 tonnes per year for tuna loins and 800 tonnes per year for cans, both duty-free within the quota only. Preferential access is conditional on strict rules of origin, meaning that only tuna caught by Indonesian vessels, or by EU vessels and processed in Indonesia, can benefit.

This must be seen in the broader context of the Indian Ocean tuna fishery: Indonesia is the largest tuna producer country in the Indian Ocean with their vast EEZ and countless fleet, from industrial to artisanal tuna fleets. They are the largest single allocation holder for skipjack and bigeye, and one of the leading players for yellowfin, making it the largest overall stakeholder in the IOTC tropical tuna fisheries<sup>2</sup>.

This dominant position already translates into strong access to the EU market. This is evident in the existing Autonomous Tariff Quota (ATQ) of 35,000 tonnes for tuna loins, widely used by third countries, notably Indonesia. Between 2020 and 2023, Indonesia exported approximately 33,195 tonnes under this quota (around 25%), and the ATQ for 2024–2026 remains unchanged and rapidly exhausted each year. The EU tropical tuna purse seine fleet, which supplies the European canning industry, is directly exposed to this competition. Xavier Leduc, President of Europêche, warns: *“Indonesia is already a key supplier of raw material for EU canneries. Additional preferential access risks further displacing EU-caught fish in a highly price-sensitive market segment.”*

In addition, while the European Union is strengthening its internal framework through instruments such as the Forced Labour Regulation and corporate due diligence rules to prevent products made under unacceptable labour conditions from entering its market, the Indonesian trade agreement relies, like others, on non-binding commitments when it comes to fundamental labour rights. Anne-France Mattlet, director of Europêche Tuna Group, regrets: *“In practice, partner countries are merely encouraged, rather than required, to ratify and effectively implement core ILO conventions, with no enforceable obligations or meaningful sanctions attached. This inconsistency undermines the EU’s credibility and creates an uneven playing field for operators expected to meet high standards within the EU”*.

Europêche calls for adjustments before the agreement is finalised: First, the quota for tuna loins should be aligned with that for canned tuna and limited to 800 tonnes, to avoid disproportionate exposure of EU fleets. Second, tuna fillets should not be fully liberalised and should instead be treated

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<sup>1</sup> [Text of the agreements - Trade and Economic Security - European Commission](#)

<sup>2</sup> In the Indian Ocean, Indonesia holds catch limits of approximately 138,000 tonnes of skipjack (≈22% of the TAC), 18,605 tonnes of bigeye (≈23%), and 42,634 tonnes of yellowfin (≈10%)

similarly to tuna loins, given their high value and competition with EU vessels' products meeting the highest environmental and sanitary standards. Finally, Europêche calls for the elimination of the ATQ for tuna loins, as such volumes should not coexist with additional preferential access granted under trade agreements.

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**Press contacts:**

Anne-France Mattlet, Europêche Tuna Group Director: [anne-france.mattlet@europeche.org](mailto:anne-france.mattlet@europeche.org)