



Dairy Trade and Thailand

October 2026

The EU Dairy Sector and EDA

The European Dairy Association (EDA) is the recognized voice and trade association of the European milk processing industry, representing both cooperative and private-owned dairies, SMEs, and global leaders across the European Union.

EU dairy companies' diversified export portfolio ensures that consumers in all regions of the world can be supplied with our unique and healthy European dairy products. With more than 45,000 jobs directly linked to these exports, the dairy sector is also a key contributor to local communities, supporting growth and employment directly and indirectly through dairy production and exports.

 The EU is Thailand's second-largest dairy supplier, accounting for **22% of Thai dairy imports**, behind New Zealand, which, like Australia, has enjoyed duty-free access since 2025. EU dairy exports to Thailand are worth **€208 million** annually, **17% of all EU agri-food** exports to the country (€1.2 billion). Overall, the EU is Thailand's fourth-largest trading partner, but trade relations are not yet covered by a free trade agreement

Negotiations on an EU–Thailand Free Trade Agreement were launched in 2013, paused in 2014 and relaunched in 2023. Following the latest negotiating round in autumn 2026, most chapters have been provisionally closed, while talks on market access, including for agricultural products, are continuing. Both sides aim to conclude negotiations by the end of 2026.

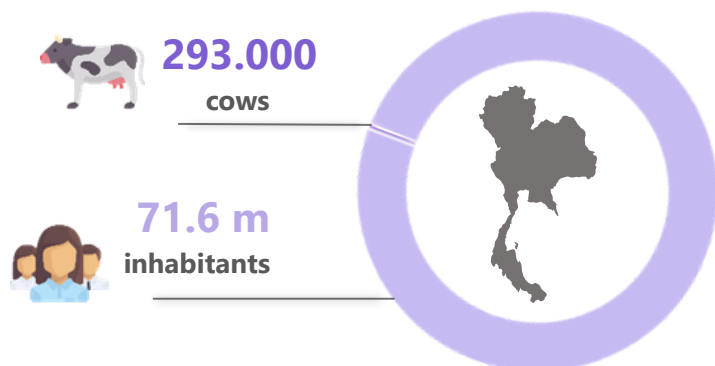
The European Dairy Association (EDA) welcomes the progress in the EU–Thailand free trade negotiations and calls for an ambitious outcome for dairy. An agreement that removes tariffs, simplifies market access procedures and protects European geographical indications would open new opportunities for EU dairy in one of South-East Asia's most promising markets.

A lot of work has been done since the relaunch of the negotiations in 2023, and EDA acknowledges the efforts of the EU Commission in supporting our dynamic sector. A future EU–Thailand Free Trade Agreement will be beneficial for both economies. From a dairy perspective, Thailand has a small but growing dairy sector, with a self-sufficiency rate of only 47%. Imports therefore play a key role, and the market is dominated by New Zealand and Australia, which have enjoyed duty-free access since 2025. The EU is already Thailand's second-largest dairy supplier, mainly of whey and skimmed milk powder from Germany, France, Czechia, Poland and the Netherlands. EU cheese and butter exports, however, have not reached a significant volume, as they still face tariffs of 30%. But this is where opportunities lie. Ambitious market access for dairy and strong protection of European geographical indications would strengthen the well-deserved excellence reputation of all our European premium dairy products in Thailand.

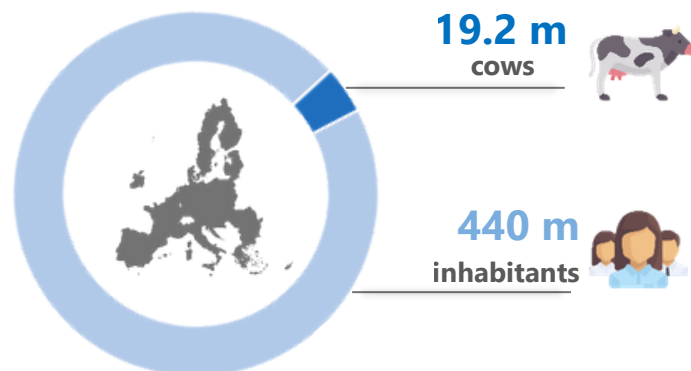
The Dairy sector in Thailand and the EU



Thailand



EU



Milk yield

Per cow, in 2025



EU: **8** tonnes

Thailand: **3.6** tonnes

Dairy farms

Number in 2025



EU: **550** (in '000)

Thailand: **27** (in '000)

Herd size

Cows per farm in 2025



Milk production

in 2025 (million tonnes)





Self-sufficiency in milk 2025

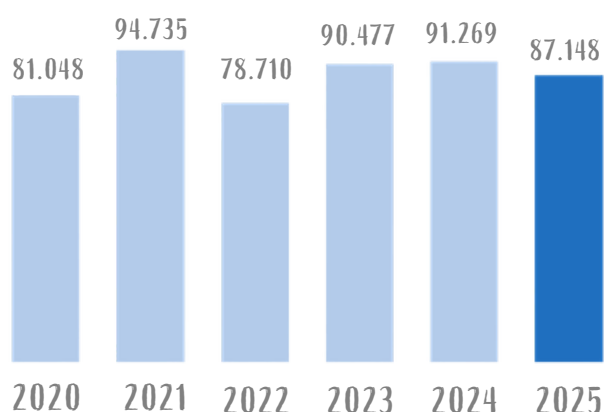


Consumption per capita per year In 2025 (milk equivalent)



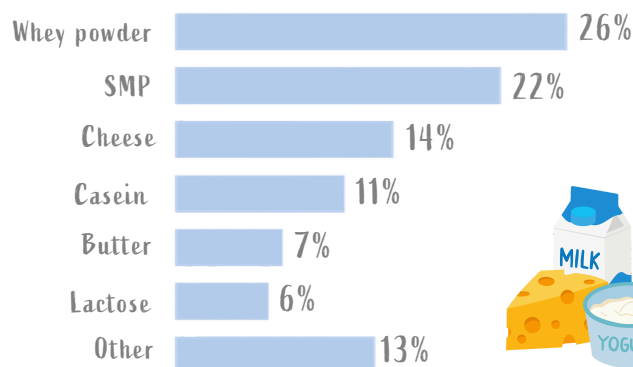
EU dairy exports to Thailand

Volume in tonnes 2020/2025

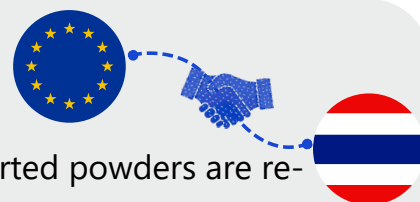


What the EU exports to Thailand

Share of dairy export value, 2025



Key insights



- 47% self-sufficiency, yet a regional processing hub: imported powders are re-exported as finished products
- 1/10 of EU consumption per capita (32 vs 318 kg).
- €208 m EU dairy exports in 2025, +32% since 2020.
- Whey powder is the EU's top dairy export product to Thailand, and the EU supplies 54% of Thai whey imports.
- 0% vs. 30%: New Zealand and Australia export duty-free, while EU cheese and butter face a 30% import tariff.
- FTA in sight: most chapters provisionally closed, conclusion targeted for end of 2026.