MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS in 2025

Publication: February 2026

Contents

HIGHLIGHTS
1 EU AGRI-FOOD EXPORTS
1.1 OVERVIEW
1.2 EXPORT DESTINATIONS
1.3 EXPORTED PRODUCTS
2 EU AGRI-FOOD IMPORTS
2.1 OVERVIEW
2.2 IMPORT ORIGINS
2.3 IMPORTED PRODUCTS
3 EVOLUTION OF EU TRADE BALANCE
3.1 BY PRODUCT CATEGORY
3.2 BY PARTNER REGION
4 ZOOM ON EU TRADE WITH FTA PARTNERS

EDITORIAL

Directorate-General for Agriculture
and Rural Development, Unit G.1

Email: Agri-G1@ec.europa.eu
Website:
https://agriculture.ec.europa.eu/international/agricultural-trade/trade-and-international-policy-analysis_en

Data source: Eurostat COMEXT (unless otherwise specified)
Extraction date for statistics: 13/02/2026

Please cite this publication as: EC (2026), Monitoring EU agri-food trade. European Commission, DG Agriculture and Rural Development, Brussels.

Note to the reader

The latest available consolidated trade data at EU level cover market developments in 2025.

The trade figures are expressed in value, except when specifically mentioned. Price variations are based on a unit value that is the average price of products traded in the period concerned (trade value at the border divided by the quantity registered).

The definitions of product aggregates (classes, categories and sub-categories) and the regional aggregates used for the analysis of EU trade in this report are available online (https://agriculture.ec.europa.eu/international/agricultural-trade/trade-and-international-policy-analysis_en#reference-files). The definitions for regions are also available on page 20.

Stacked bar charts display the most exported/imported products or the main partners in 2025, the rest are aggregated in “other products”/”rest of the World”.

HIGHLIGHTS: EU agri-food trade reached new records in 2025, but surplus declined

EU **agri-food exports** reached a new record level of EUR 238.4 billion in 2025, an increase of 1% compared to the previous record in 2024 (+ EUR 2.8 billion). The EU reinforced its position as the largest agri-food exporter, being the only top-5 world exporter to increase its export value. The UK strengthened its position as the top destination of EU exports, while exports to the US and China decreased. However, the destinations of EU exports remained diversified. The EU kept exporting a diversified basket of products, topped by exports of cereal preparations, dairy products and wine. Higher prices drove up the value of export of cocoa products, coffee, chocolate and dairy products. The value of exported olive oil decreased due to lower prices and volumes of wine and cereals declined.

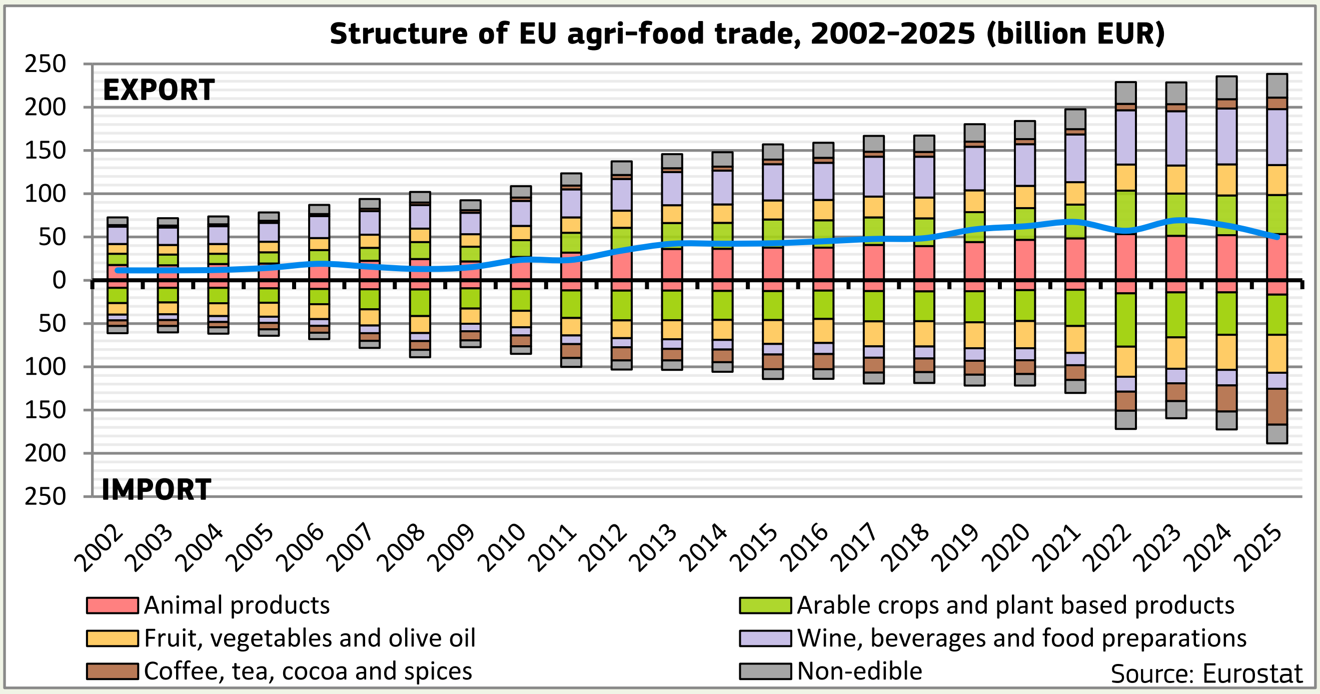
EU **agri-food imports** also reached a new record level of EUR 188.6 billion in 2025, an increase of 9% compared to the previous record of 2024 (+ EUR 16.2 billion). This made the EU the largest importer of agri-food products in 2025. This increase was again primarily driven by a steep increase in the price of imports of cocoa and coffee and to a lower extent of fruits and nuts. Imports of oilseeds and protein crops decreased in value due to lower prices and imported volumes of cereals declined. The EU continued to import agri-food products from a diverse set of trade partners, with Brazil, the UK and the US as the top sources. Imports increased from Côte d'Ivoire and Ghana, as Sub-Saharan Africa became one of the main regions of origin of EU imports. Imports also increased from Canada, Viet Nam and the US, while there was a notable decrease in imports from Ukraine.

Overall, the stronger growth in import value led to a decline in the EU **agri-food trade balance** to EUR 49.9 billion, EUR 13.3 billion less than in 2024. However, the EU surplus remains four times higher than in 2002 and the EU remains a net exporter in most product categories.

Agri-food trade represented 9% of EU total exports, 7.5% of EU total imports, and 37% of the EU overall trade surplus in 2025.

Trade with **free trade agreement (FTA) partners** represented a majority of both EU exports (61%) and imports (57%) in 2025. The EU has expanded its network of trade agreements in the past two decades and trade grew on average faster with those countries.

For more figures, visit the new trade app on the Agri-food Data Portal: [Overview of EU agri-food trade](#).

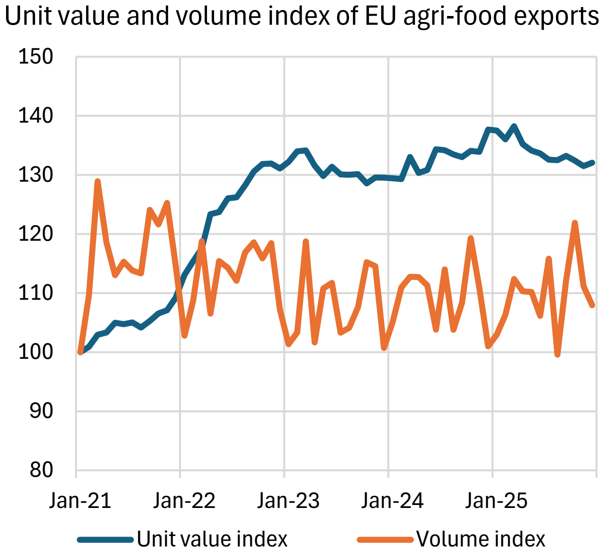


1 EU AGRI-FOOD EXPORTS

1.1 OVERVIEW

EU EXPORTS REACHED A NEW HIGH

EU agri-food exports remained robust in 2025, as they reached a new record of EUR 238.4 billion, a slight increase of 1.2% compared to the previous record reached in 2024 (+ EUR 2.8 billion). EU exports remained above their 2024 level during the whole year, except for the months of August and November (see graph below). Agri-food exports represented 9.0% of total EU exports in 2025 (EUR 2.6 trillion), compared to 9.1% in 2024.



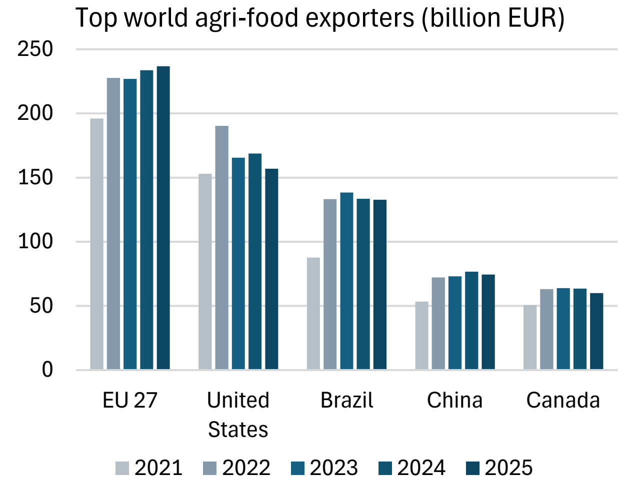
Note: DG AGRI calculation based on COMEXT data. Laspeyres index based on unit values computed on EU total exports at the sub-category product level. Product weights based on 2021 export volumes, Jan. 2021=100.

EU agri-food export prices remained high and reached a new peak in early 2025 before easing up during the rest of the year, as shown by the exports' unit value index (see right). On average over the whole year, export prices remained stable compared to 2024.

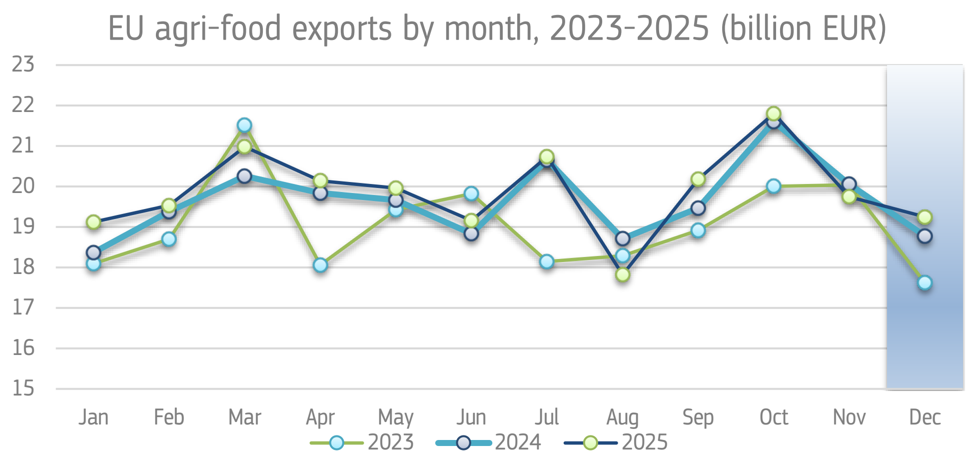
Overall export volumes oscillated during the year (see volume index), but on average, they remained stable compared to 2024.

EU REINFORCED AS TOP WORLD AGRI-FOOD EXPORTER

Among the top five largest agri-food exporters, the EU is the only one who increased the value of its exports in 2025. US exports declined to EUR 157.0 billion (-7%), Brazil exports declined by 1% to EUR 132.7 billion, China exports declined by 3% to EUR 74.5 billion, and exports from Canada declined by 6% to EUR 60.0 billion. This shows the resilience of EU agri-food exports despite a volatile trade context.



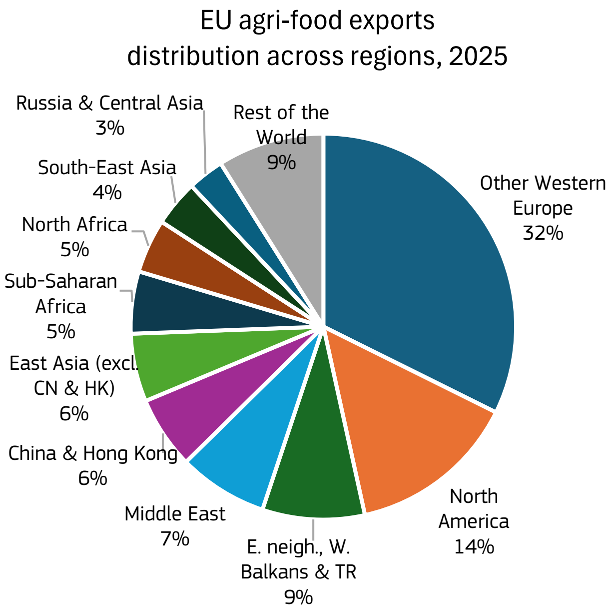
Source: Trade Data Monitor LLC



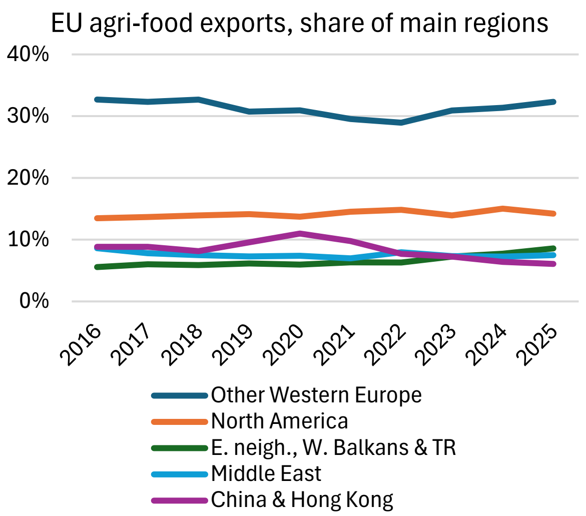
1.2 EXPORT DESTINATIONS

WESTERN EUROPE AND NORTH AMERICA REMAINED KEY DESTINATIONS

Non-EU western European countries (Other Western Europe) and North America remained the key destinations of EU exports, representing respectively 32% and 14% of the EU export value in 2025. However, the EU continued to export to a diverse set of partners, spread across all regions of the globe.



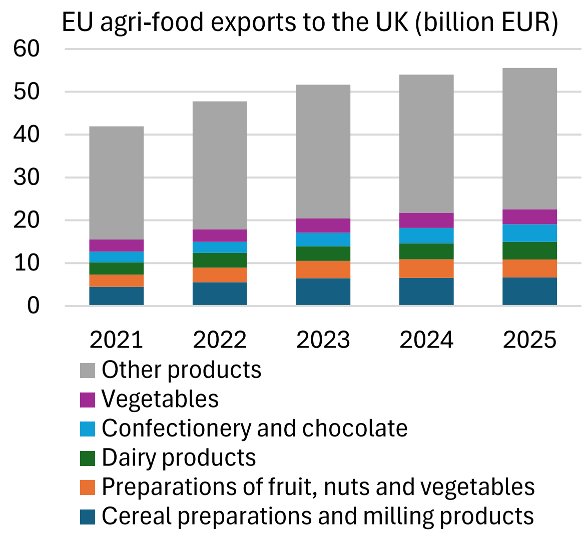
Exports to Other Western European countries have continued to increase in 2025, while exports to North America have declined. Exports to Eastern neighbourhood, Western Balkans and Türkiye have also continued their progression, reaching 9% of EU exports in 2025, up from 6% in 2022. The share of China & Hong Kong in EU exports has declined to 6% in 2025, down from a high of 11% in 2021.



EXPORTS TO UK INCREASED, REDUCTIONS TO US AND CHINA

The UK remained the first destination of EU agri-food exports in 2025, representing 23% of EU exports (EUR 55.6 billion). It was the destination with the largest increase in EU exports (+ EUR 1.6 billion, +3%) compared to 2024, continuing an increasing trend. This was mainly explained by higher export prices of cocoa products and chocolate, as well as higher volumes of dairy products.

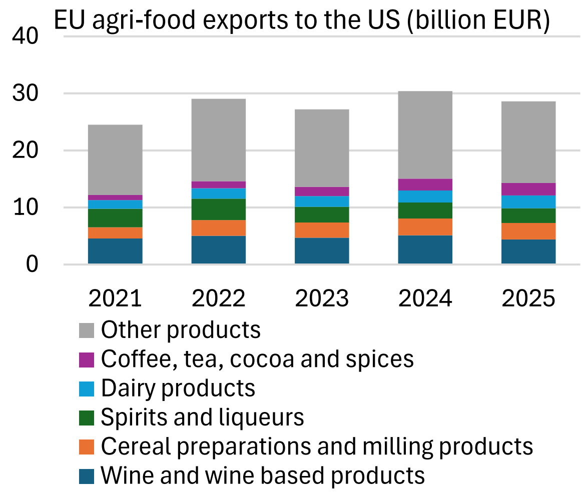
EU exports to the UK are diverse and it is a key destination for many EU agri-food products, such as poultry and eggs (EUR 3.3 billion in 2025, 51% of EU exports) and beef and veal (EUR 2.2 billion, 44% of EU exports). The main categories of EU exports to the UK in 2025 were: cereal preparations and milling products (EUR 6.7 billion), preparations of fruit, nuts and vegetables (EUR 4.2 billion), dairy products (EUR 4.1 billion), confectionery and chocolate (EUR 4.1 billion) and vegetables (EUR 3.5 billion).



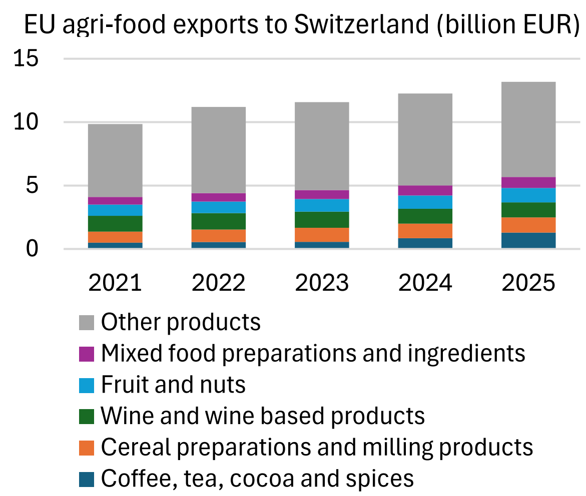
The US remained the second destination of EU exports in 2025 (12% of EU exports, EUR 28.6 billion), but this is the destination where EU exports declined the most compared to 2024 (- EUR 1.8 billion, -6%). After starting the year at a high level until March, they slid below their 2024 level since July.

This is explained in particular by a decline in exports of wine and wine-based products (- EUR 721 million, -14%), a decrease in the value of exports of olives and olive oil (- EUR 589 million, -22%, despite a 8% increase in volume), as well as lower exports of beer, cider and other beverages (- EUR 341 million, -17%).

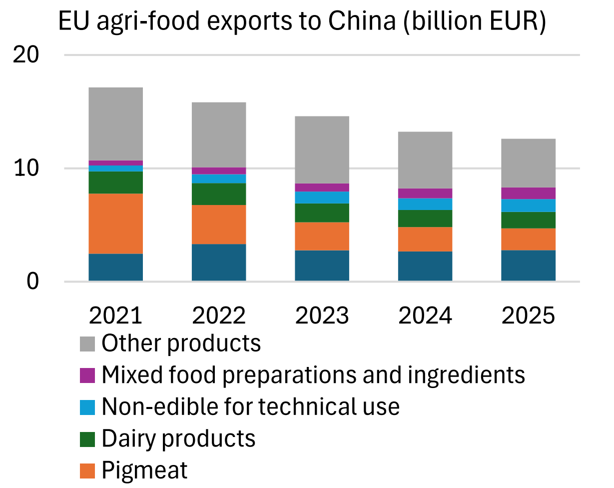
The categories of products most exported to the US in 2025 were: wine and wine-based products (EUR 4.4 billion, for which the US represents 27% of EU exports), cereal preparations and milling products (EUR 2.9 billion), spirits and liqueurs (EUR 2.6 billion, 31% of EU exports), dairy products (EUR 2.2 billion) and coffee, tea, cocoa and spices (EUR 2.2 billion).



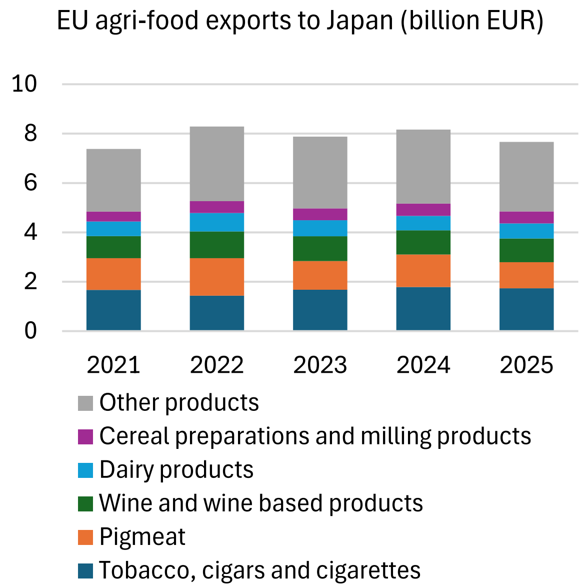
Switzerland was the third destination of EU agri-food exports in 2025 (6% of EU exports, EUR 13.2 billion) and had the second largest increase in EU exports (+ EUR 919 million, +7%), continuing a steady progression. This was explained in part by an increase in the value of exports of coffee, tea, cocoa and spices (+ EUR 440 million, +52%) and across various other products.



China slid as the fourth destination of EU exports in 2025 (5% of EU exports, EUR 12.6 billion). It was the destination with the second largest reduction in EU exports compared to 2024 (- EUR 619 million, -5%), continuing a declining trend since a peak at EUR 17.7 billion in 2020. This was mainly explained by a strong reduction in exports of cereals (- EUR 603 million, -76%, in particular for wheat), as well as declines in exports of pigmeat, wine and wine-based products, and spirits and liqueurs.

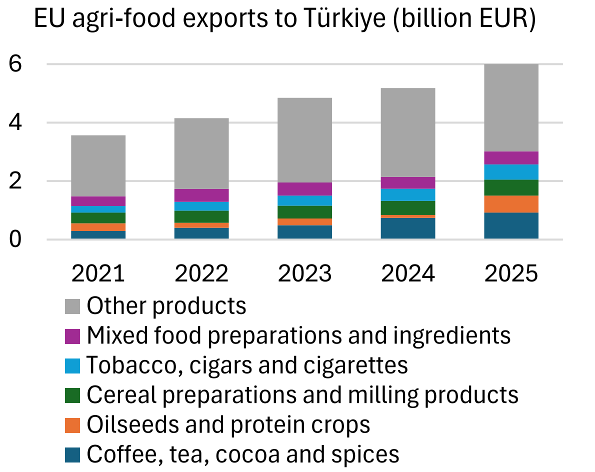


Japan was the fifth destination of EU exports in 2025 with EUR 7.7 billion (3% of EU exports), despite a decrease of EUR 500 million (-6%) compared to 2024. This was mainly explained by lower pigmeat exports (- EUR 257 million, -20%), as well as lower value of olives and olive oil exports, and preparations of fruit, nuts and vegetables.

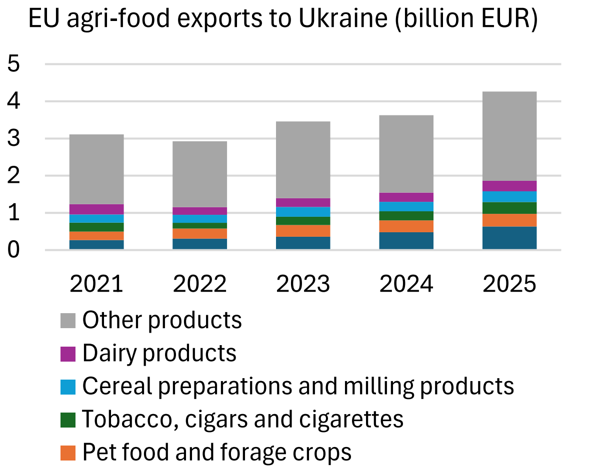


HIGHER EXPORTS TO TÜRKIYE AND UKRAINE

Among other significant evolutions, **exports to Türkiye increased by EUR 833 million** (+16%) compared to 2024, continuing a steady trend since 2020. This was mainly explained by higher exports of sunflower seeds (+ EUR 503 million, +853% compared to 2024) as well as cocoa products, while exports of beef and veal decreased by EUR 286 million (-41%).



Exports to Ukraine continued to progress with an increase of EUR 636 million compared to 2024 (+18%), with increases across many categories, including coffee, tea, cocoa and spices.



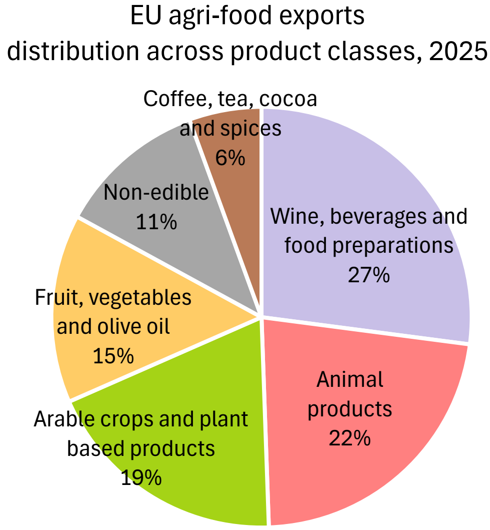
Exports to **Norway** also increased by EUR 581 million (+10%), spread across various product categories

By contrast, EU exports to Nigeria declined by EUR 455 million (-28%), primarily due to lower exports of wheat. Exports to **Russia** decreased by EUR 393 million (-6%), due to decreases across most product categories.

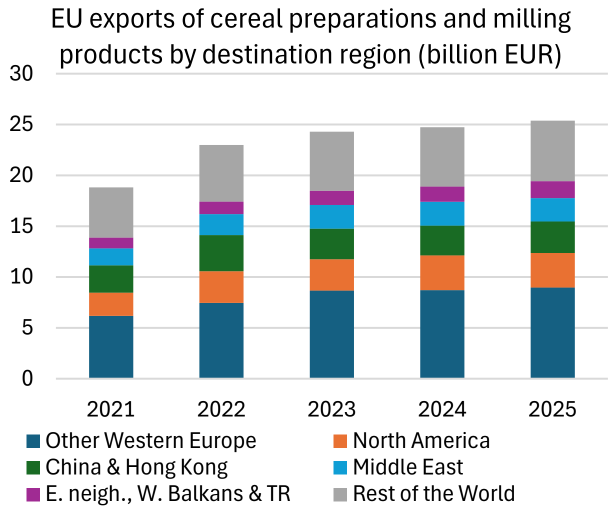
1.3 EXPORTED PRODUCTS

EU EXPORTS OF WINE DECLINED, WHILE DAIRY PRODUCTS INCREASED IN VALUE

EU agri-food exports continued to be distributed across a large set of product categories in all product classes. The most exported product categories in 2025 remained cereal preparations and milling products (11% of EU agri-food exports), followed by dairy products (9%), wine and wine-based products (7%), mixed food preparations and ingredients (7%), and confectionery and chocolate (6%).

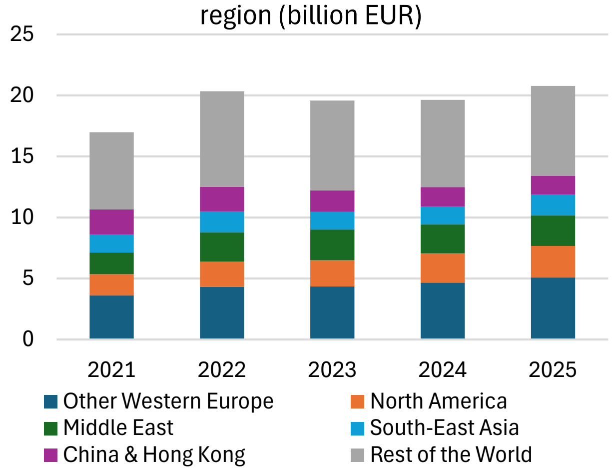


EU exports of **cereal preparations and milling products** slightly increased in 2025 compared to 2024 (+ EUR 644 million, +3%) and reached EUR 25.4 billion. The main destinations of these exports were Other Western Europe (35% of EU exports value, mainly to the UK), North America (13%, mainly to the US) and China & Hong Kong (12%).



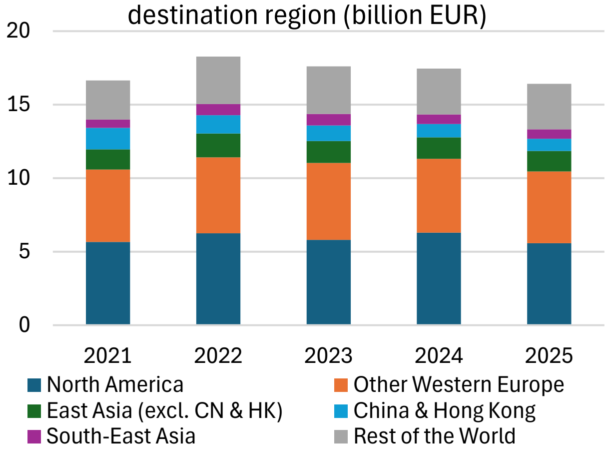
EU exports of **dairy products** grew by EUR 1.1 billion in 2025 (+6%, third largest increase in value). They reached EUR 20.8 billion in 2025, including EUR 9.1 billion in cheese and curd. This increase was explained particularly by higher prices for cheese and curd, and butter. Exports grew to the main destinations of EU exports in 2025, including Other Western Europe (+EUR 438 million, +9% compared to 2024), North America (+7%), the Middle East (+5%) and South-East Asia (+17%). However, exports declined to North Africa (- EUR 54 million, -4%) and China & Hong Kong (- EUR 41 million, -3%).

EU exports of dairy products by destination region (billion EUR)



EU exports of **wine and wine-based products** had the second largest reduction in export value (- EUR 1.0 billion, -6%), reaching EUR 16.4 billion in 2025. This was mainly explained by a reduction of EUR 721 million in exports to the US (-14%), which remained the first destination with 12% of EU exports in 2025. Exports also declined to the UK (- EUR 148 million, -4%), China (- EUR 113 million, -21%) and Russia (- EUR 97 million, -15%), while they progressed to Sub-Saharan Africa (+ EUR 62 million, +14%) and Oceania (+ EUR 40 million, +11%).

EU exports of wine and wine based products by destination region (billion EUR)



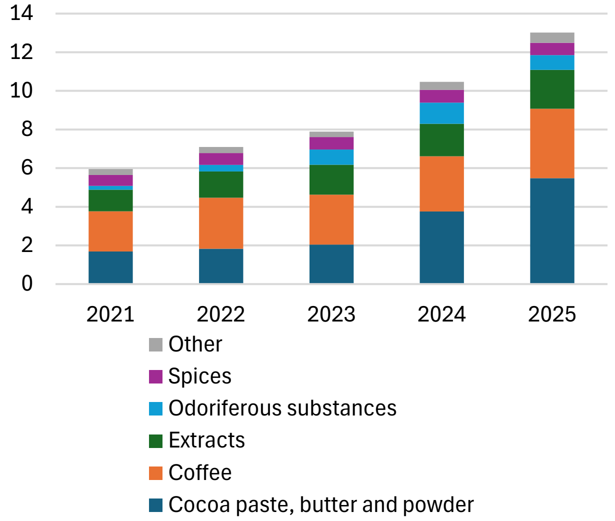
COCOA PRICES DROVE UP EU EXPORTS

The most significant increase in EU export value was again in the category **coffee, tea, cocoa and spices** (+ EUR 2.6 billion, +24%). Exports reached EUR 13.3 billion in 2025, continuing a long increasing trend.

This increase was mainly driven by an increase in the export value of cocoa paste, butter and powder (+ EUR 1.7 billion, +46%), due to a strong increase in prices (+57%) while volumes declined by 7%. Exports of coffee also increased by EUR 735 million (+26%), due to higher prices as well (+27%).

This led to higher exports values, in the category, to the UK (+ EUR 533 million, +29%) and Switzerland (+ EUR 440 million, +52%) as well as to North America, and Eastern neighbourhood, Western Balkans and Türkiye.

EU exports, detail for category coffee, tea, cocoa and spices (billion EUR)



Exports of **confectionery and chocolate** followed with the second largest increase in value (+ EUR 1.4 billion, +12%) and reached EUR 13.3 billion in 2025. This increase was mainly for exports of chocolate which reached EUR 10.5 billion, with an increase of EUR 1.3 billion (+14%), explained by higher prices (+22%) while volumes declined by 6%. This led to increased exports values Other Western Europe (in particular to the UK), Eastern neighbourhood, Western Balkans and Türkiye, North America, and the Middle East.

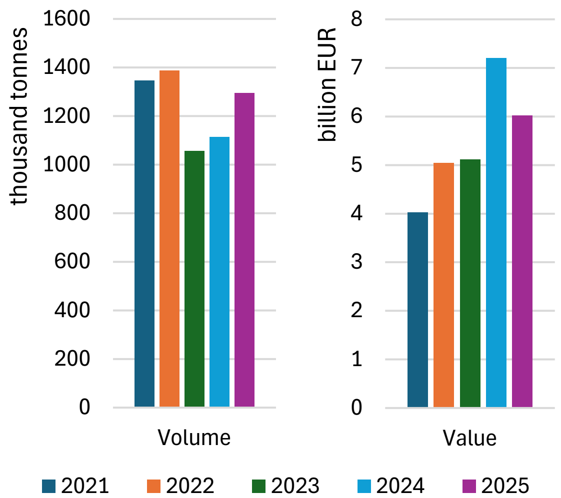
Exports of **tobacco, cigars and cigarettes** also increased by EUR 545 million (+7%) and reached EUR 8.3 billion. The main increases were in direction of Eastern neighbourhood, Western Balkans and Türkiye, as well as Russia & Central Asia.

LOWER OLIVE OIL PRICES AND CEREAL EXPORTS

EU exports of **olives and olive oil** recorded the largest reduction in value in 2025 (- EUR 1.2 billion, -16%) compared to 2024 and reached EUR 6 billion. However, this was explained by a reduction in prices of 28% compared to the peak reached in 2024 and they remained at higher levels than in previous years. Volumes exported increased by 16% compared to 2024 but remained slightly below previous years.

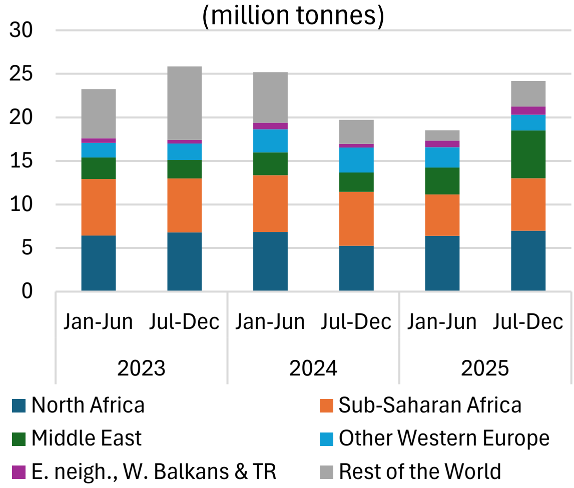
Lower prices explained a much lower export value to the US (- EUR 589 million, -22%), which represented 38% of EU exports in 2025. However, at the same time exports to South Korea increased by EUR 69 million (+33%).

EU exports of olive oil



EU exports of **cereals** decreased by EUR 978 million (-8%), reaching EUR 10.7 billion. This is mainly explained by a lower production in 2024 which weighed on exports in the first half of 2025. Volumes exported decreased by 5% and reached 42.7 million tonnes in 2025, including 27.8 million tonnes of wheat (-12%), 11.9 million tonnes of other grains (+25%), and 2.6 million tonnes of maize (-25%).

EU cereals exports by destination region (million tonnes)



Exports of cereals increased strongly by 3.7 million tonnes (+77%) to the Middle East in 2025 compared to 2024 and by 1.3 million tonnes to North Africa (+11%). By contrast, they decreased significantly to China & Hong Kong (- 2.7 million tonnes, -74%), due both to lower EU supply and lower demand in China. They also declined to Sub-Saharan Africa (-1.9 million tonnes, -15%) and Other Western Europe (-1.4 million tonnes, -25%).

Preparations of **fruits and vegetables** also declined by EUR 605 million (-5%) and reached EUR 12.3 billion.

Exports of **spirits and liqueurs** reached EUR 8.3 billion, a reduction of EUR 510 million (-6%) compared to 2024 which continues a declining trend since 2022. This was explained by reduced exports to the US (- EUR 242 million, -9%), but also to China (- EUR 111 million, -15%), Singapore (- EUR 104 million, -20%) and Russia (- EUR 102 million, -24%). By contrast, exports to Sub-Saharan Africa increased by EUR 116 million (+25%).

Exports of **beef and veal** remained stable in value at EUR 5.0 billion in 2025, however a 20% drop in exported volumes was compensated by a comparable increase in prices. Exports to Other Western Europe increased by EUR 463 million (+22%), but they declined to Türkiye by EUR 286 million (-41%).

Exports of **vegetable oils** also declined by 23% in volume, leading to a lower export value of EUR 2.3 billion in 2025 (- EUR 302 million, -12%), despite higher prices.

2 EU AGRI-FOOD IMPORTS

2.1 OVERVIEW

EU IMPORTS INCREASED, MAINLY DRIVEN BY HIGHER PRICES

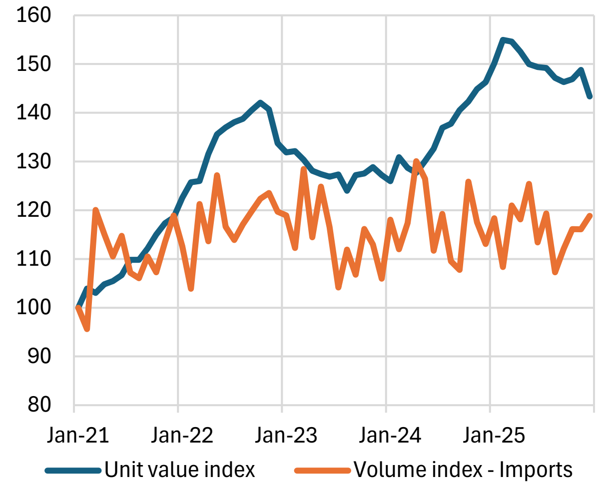
EU agri-food imports also reached a new record level of EUR 188.6 billion in 2025, an increase of 9% (+ EUR 16.2 billion) compared to the previous record of 2024. Imports were especially high in the beginning of the year and remained above their 2024 level all year except for October. Agri-food imports represented 7.5% of total EU imports in 2025 (EUR 2.5 trillion), compared to 7% in 2024.

This increase in the value of EU imports is mainly driven by higher prices, with an average increase in prices of 10%. Import prices reached a new peak in March-April (see import unit value index right), mainly driven by high cocoa and coffee prices. Prices declined but remained high during the rest of the year. Imported volumes have oscillated but they declined slightly on average compared to 2024 (see volume index).

THE EU WAS THE LARGEST AGRI-FOOD IMPORTER IN 2025

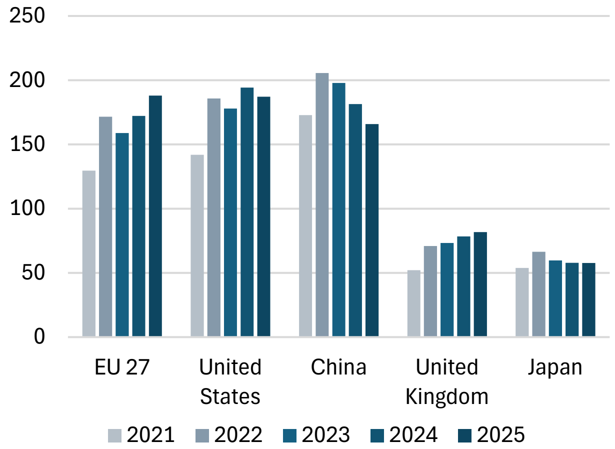
With a higher import value in 2025, the EU became the largest agri-food importer. The EU edged the US whose imports declined by 4% to EUR 187 billion and overtook China whose imports decreased by 9% to EUR 166 billion. UK imports increased by 4% to EUR 82 billion and Japan imports remained stable at EUR 58 billion.

Unit value and volume index of EU agri-food imports



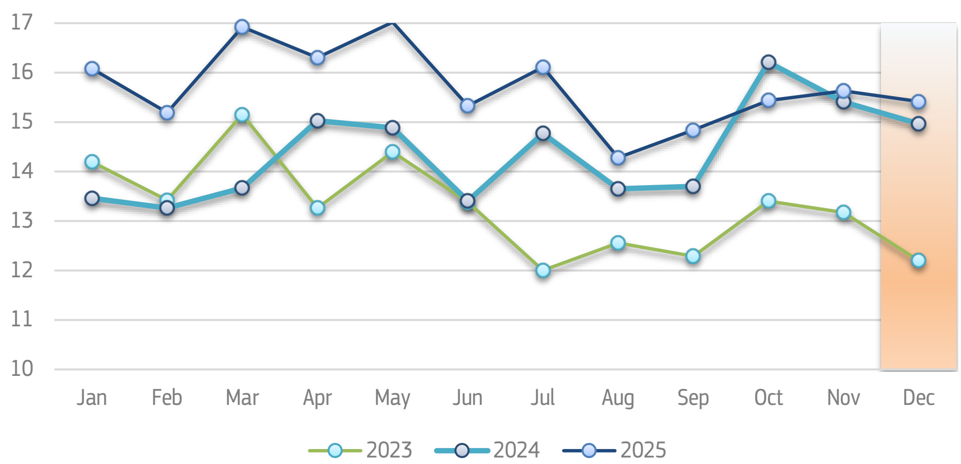
Note: DG AGRI calculation based on COMEXT data. Laspeyres index based on unit values computed on EU total exports at the sub-category product level. Product weights based on 2021 export volumes, Jan. 2021=100.

Top world agri-food importers (billion EUR)



Source: Trade Data Monitor LLC

EU agri-food imports by month, 2023-2025 (billion EUR)

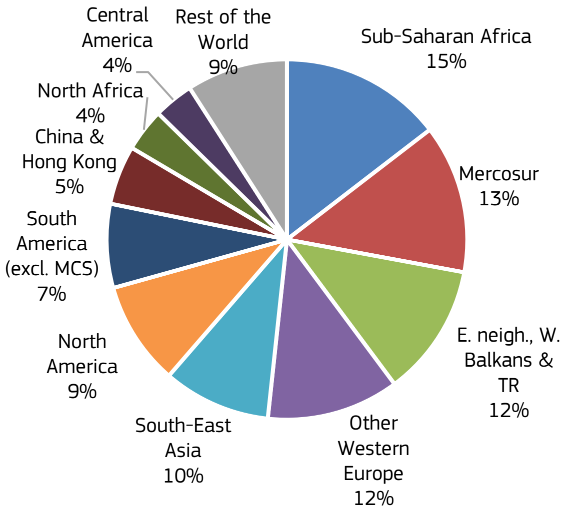


2.2 IMPORT ORIGINS

IMPORT SOURCES REMAIN DIVERSIFIED

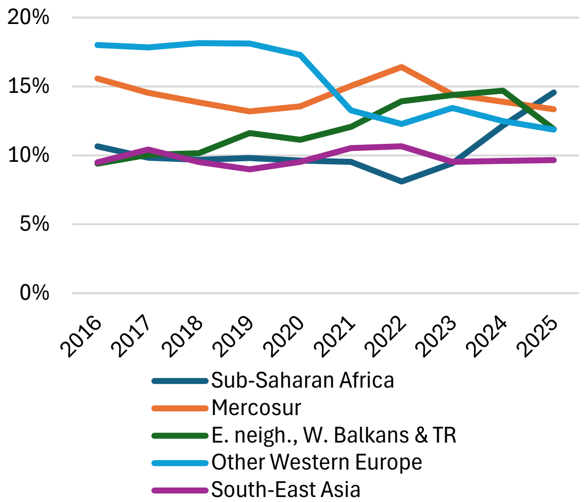
EU imports come from a diversity of regions (see graph below) and countries. The main regions of origin of EU imports in 2025 were Sub-Saharan Africa (15% of EU import value in 2025), Mercosur (13%), Eastern neighbourhood, Western Balkans and Türkiye (12%), Other Western Europe (12%) and South-East Asia (10%).

EU agri-food imports distribution across regions, 2025



Imports from Sub-Saharan Africa surged in 2025 as it became the first region of origin of EU imports, with 15% of EU imports, while it was fifth in 2022, with 8%. This is mainly explained by the higher value of imports of cocoa, tea, coffee and spices which represented 68% of EU imports from this region.

EU agri-food imports, share of main regions

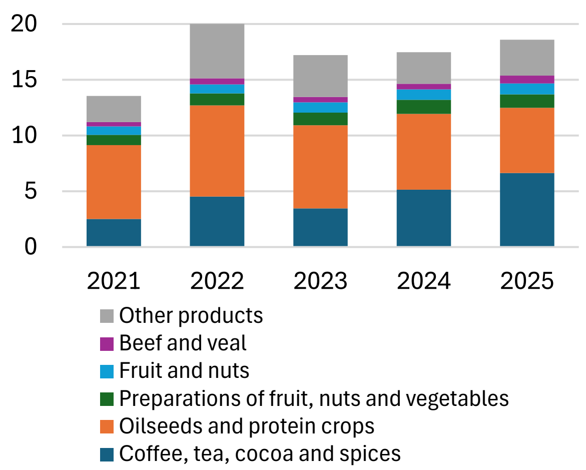


By contrast, imports from Eastern neighbourhood, Western Balkans and Türkiye decreased in 2025, as their share in EU imports declined from 15% to 12%, its lowest level since 2020. The slower growth in imports from Mercosur countries also led to a small reduction of their share in EU imports.

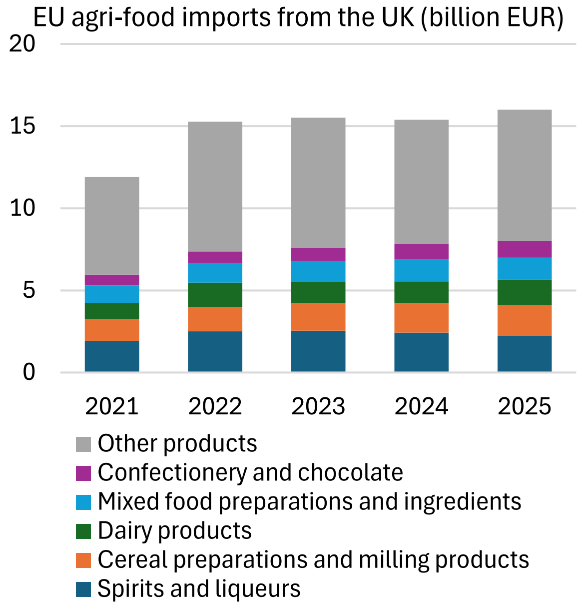
BRAZIL AND UK REMAIN FIRST ORIGIN, US OVERTAKES UKRAINE

Brazil remained the first source of EU imports (10% of EU import value in 2025), as imports increased by EUR 1.1 billion (+6%) and reached EUR 18.6 billion. This was mainly explained by the higher value of coffee imports (+ EUR 1.5 billion, +29%), pushed by higher prices (+57%) while volumes declined. Imports of maize also increased by EUR 260 million (+80%), and beef and veal by EUR 223 million due to both higher volumes (+36%) and prices. By contrast, imports of soya beans declined by EUR 564 million (-20%), due to both lower prices and volumes, and imports of soya meal declined by EUR 413 million (-11%), due to lower prices as volumes increased by 15%.

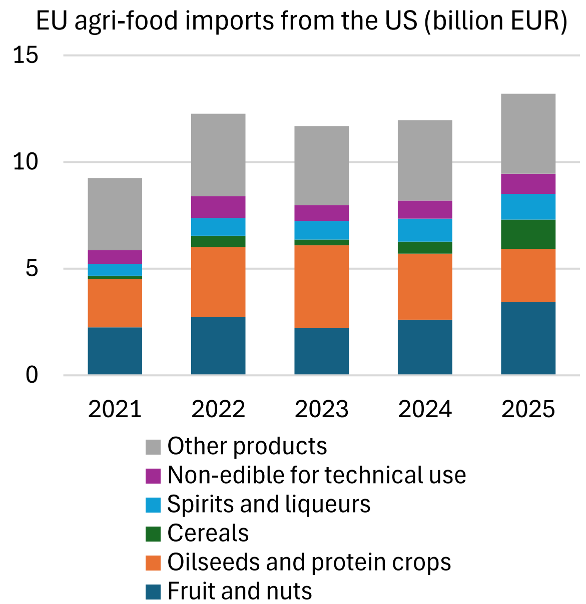
EU agri-food imports from Brazil (billion EUR)



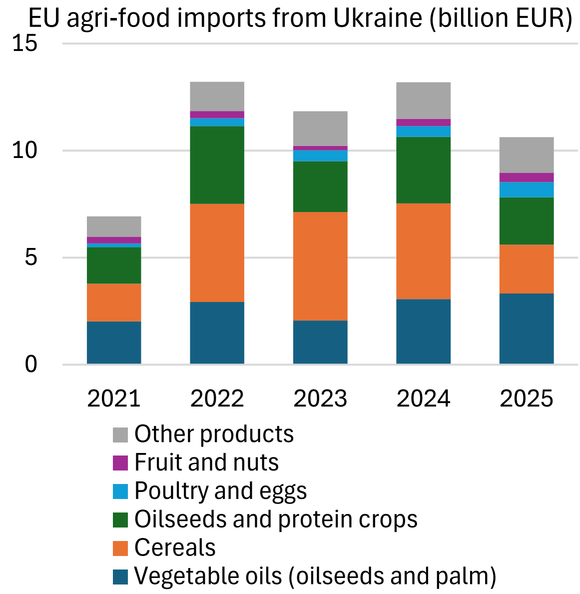
The UK remained the second source of EU imports in 2025 (8% of EU import value), as imports increased by EUR 612 million (+4%) to reach EUR 16.0 billion, spread across many products. This was mainly explained by higher imports of dairy products, beef and veal, and coffee, tea, cocoa and spices; while imports of spirits liqueurs declined by EUR 194 million (-8%).



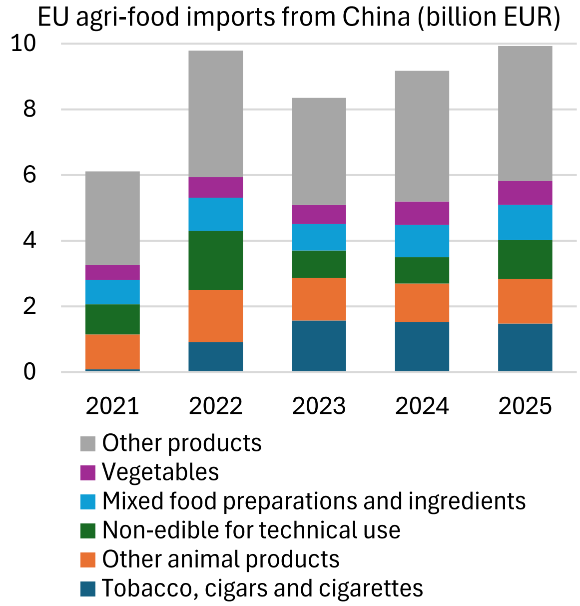
The US became again the third main origin of EU agri-food imports in 2025, with 7% of EU imports. Imports increased by EUR 1.2 billion (+10%) to reach EUR 13.2 billion. This was explained in part by the higher value of imports of nuts (+ EUR 840 million, +33%) which reached EUR 3.4 billion, as prices grew by 42%. This was also explained by a large increase in imports of maize (+ EUR 765 million, +230%, mainly due to higher volumes). Imports of spirits and liqueurs also increased by EUR 132 million (+12%). By contrast, imports of oilseeds and protein crops (mainly soya beans and soya meal) declined by EUR 614 million (-20%), due to both lower volumes and prices.



Ukraine slid back to the fourth spot in EU agri-food import sources in 2025 (6% of EU import value). It was the origin with the largest reduction in import value (- EUR 2.6 billion, -19%), to reach EUR 10.6 billion. This was mainly explained by a strong reduction in imports of cereals (- EUR 2.2 billion, -49%), due to lower volumes of both maize (-40%, -1.2 million tonnes) and wheat (-65%, - 0.9 million tonnes). Imports of rapeseed also declined by EUR 870 million (-52%), as volumes declined by 56%. By contrast, imports of vegetable oils increased by EUR 261 million (+9%), due to higher prices and strong increase in volumes of rape oil (+51%) and soya oil (+58%) while volumes of sunflower oils declined (-25%). Imports of poultry and eggs also increased by EUR 208 million (+41%), due to both higher volumes and prices.

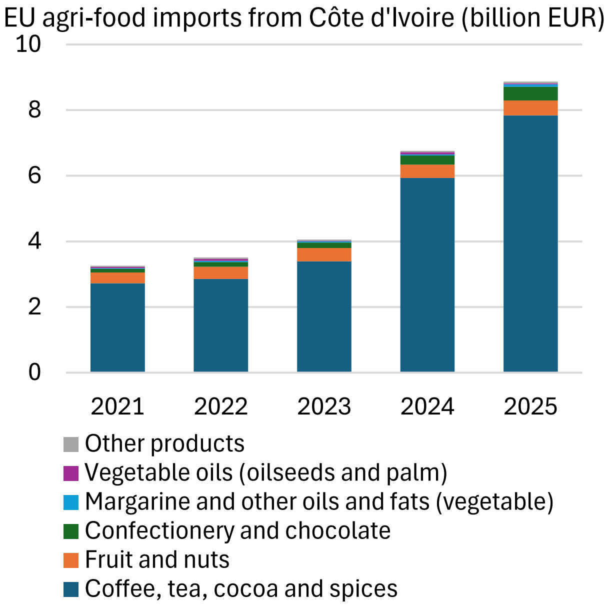


China was the fifth origin of EU imports in 2025 (5%), as imports grew by EUR 755 million (+8%) to reach EUR 9.9 billion. This was mainly explained by higher imports of non-edible products (+ EUR 383 million, +48%, mainly in non-edible oils), other animal products (+ EUR 188 million, +16%, mainly in feathers and animal guts) and fruits and nuts (+ EUR 144 million, +28%, due to both higher prices and volumes, in particular for walnuts). By contrast, imports of pet food declined by EUR 141 million (-18%) and those of tomatoes by EUR 121 million (-58%).



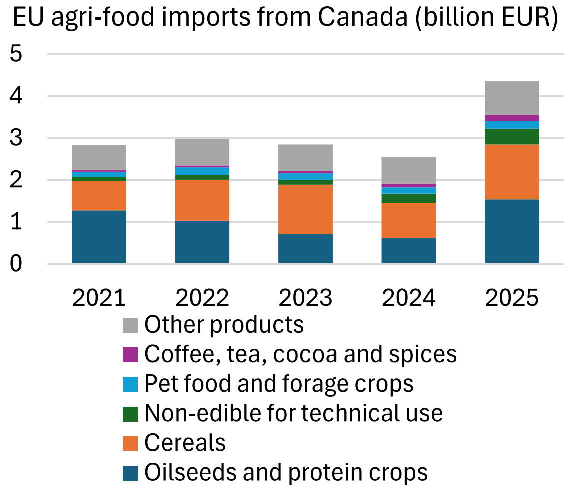
HIGHER IMPORTS FROM CÔTE D'IVOIRE, CANADA AND VIET NAM

Among other significant evolutions, **imports from Côte d'Ivoire had again the largest increase** in value compared to 2024 (+ EUR 2.1 billion, +31%) and reached EUR 8.9 billion. This was explained by the continued increase in cocoa prices. Imports of cocoa paste, butter and powder increased by EUR 1.0 billion (+50%) and reached EUR 3.1 billion as prices increased by 74%. Imports of cocoa beans increased by EUR 890 million (+23%) to reach EUR 4.7 billion, pushed by higher prices (+61%), while volumes declined.



Imports from **Ghana** also increased by EUR 1.2 billion (+69%) to reach EUR 2.9 billion in 2025, of which 90% are cocoa products. This increase was mainly driven by the higher prices and volumes of cocoa products.

Imports from Canada had the second largest increase in value (+ EUR 1.8 billion, +71%) as they reached EUR 4.4 billion. This was mainly explained by higher imports of oilseeds and protein crops which increased by EUR 921 million (+149%), despite lower prices (-26%). This includes a tenfold increase in import value of rapeseed and rape cake that reached EUR 875 million, and a 60% increase in volume of soya beans. Imports of cereals also increased by EUR 468 million (+56%), with a 75% increase in imported volumes of maize and 71% for wheat. Imports of non-edible products also increased by EUR 158 million (+72%), mainly due to an increase in imports of aromatic plants. Imports of rape oil increased from almost zero in 2024 to EUR 92 million in 2025.



Imports from Viet Nam had the third largest increase in value (+ EUR 1.5 billion, +39%) and reached EUR 5.3 billion. This was mainly explained by imports of coffee which reached EUR 2.9 billion, (+ EUR 1.0 billion, +51%) driven by higher prices. Imports of nuts (mainly cashews) also increased by EUR 179 million (+24%) and reached EUR 931 million, driven mainly by higher prices.

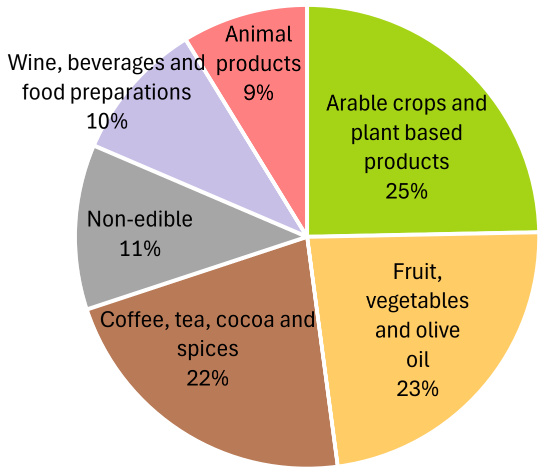
Imports from **Russia** declined by EUR 696 million (-66%), with reductions in almost all categories.

2.3 IMPORTED PRODUCTS

COCOA AND COFFEE PRICES DROVE EU IMPORTS UP

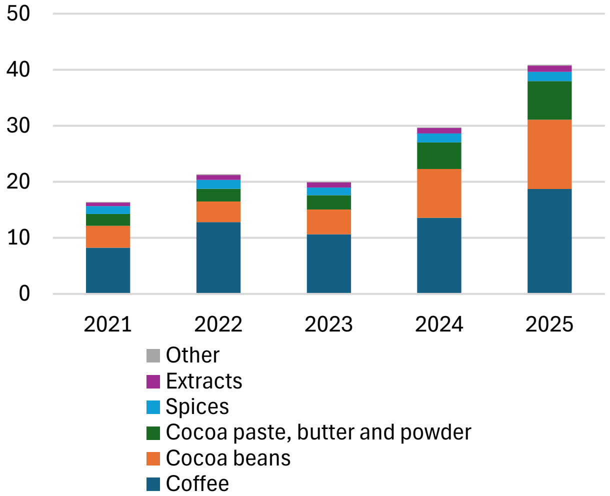
The main product classes imported by the EU in 2025 were arable crops (25% of EU import value), fruits, vegetables and olive oil (23%) and coffee, tea, cocoa and spices (22%).

EU agri-food imports
distribution across product classes, 2025



At a more detailed level, the most imported product category remained **coffee, tea, cocoa and spices** (22% of total EU imports). It also had again the largest increase in value compared to 2024 (+ EUR 11.2 billion, +37%), reaching EUR 41.5 billion and driving most of the increase in EU agri-food imports.

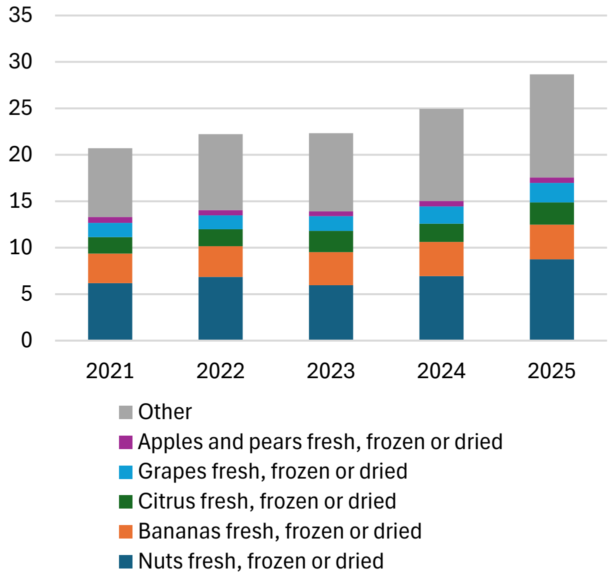
EU imports, detail for category coffee, tea, cocoa and spices (billion EUR)



This was explained in part by higher prices of coffee (+40%), that led to an increase of EUR 5.1 billion in coffee imports (+38%), and higher import values from South America (including Brazil), South-East Asia, Sub-Saharan Africa and Central America. Imports of cocoa beans (+ EUR 3.6 billion, +42%) and cocoa paste, powder and butter (+ EUR 2.2 billion, +46%), explained the rest of the increase, due to higher prices (+56% and +60% respectively), while volumes declined. This led to higher import values from Sub-Saharan Africa.

Fruits and nuts remained the second most imported product category by the EU, as imports reached EUR 28.7 billion (15% of EU imports) in 2025. They had the second largest increase in value (+ EUR 3.7 billion, +15%). This is mainly due to higher imports of nuts (+ EUR 1.8 billion, +26%), due to both higher prices and volumes, as well as higher imports of "other fruits" (+ EUR 1.2 billion, +12%), citrus (+ EUR 438 million, +22%, mainly due to higher prices) and grapes (+ EUR 238 million, +13%, due to both prices and volumes). These developments led to higher import values from South America (excl. Mercosur), the US, North Africa and Sub-Saharan Africa.

EU imports, detail for category fruits and nuts (billion EUR)

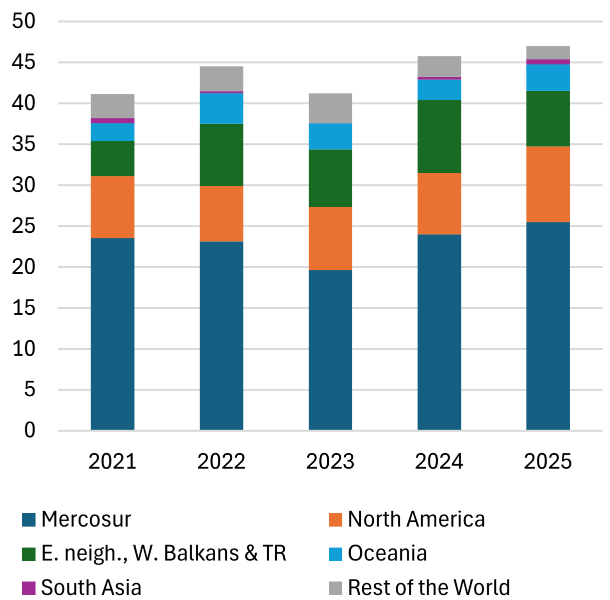


Oilseeds and protein crops remained the third most imported product category by the EU and reached EUR 18.5 billion in 2025 (10% of EU imports). However, it is the category with the largest decline in import value

(- EUR 1.6 billion, -8%). This is explained by price reductions (-10%), while volumes increased by 3% to reach 47.0 million tonnes. This includes 20.9 million tonnes of soya meal (+11%), 14.2 million tonnes of soya beans (-3%), 6.9 million tonnes of rapeseed (+7%) and 3.0 million tonnes of sunflower seed and cake (-25%).

Imports increased from Canada (+2.4 million tonnes, +234%, mainly rapeseed), Argentina (+920 000 tonnes, +13%, mainly in soya meal and sunflower cake), Brazil (+801 000 tonnes, +5%, mainly in soya meal, while soya beans declined), and Australia (+737 000 tonnes, +30%, mainly rapeseed). By contrast, imports declined from Ukraine (-1.9 million tonnes, -25%, mainly in rapeseed and sunflower, while soya meal increased) and the US (-638 000 tonnes, -10%, mainly in soya beans and soya meal).

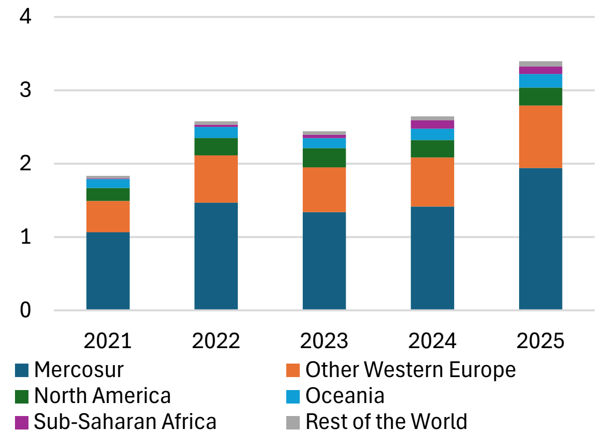
EU imports of oilseeds and protein crops by origin region (million tonnes)



Imports of **margarine and other oils and fats** had the third largest increase in value (+ EUR 763 million, +18%) and reached EUR 4.9 billion in 2025. This was mainly explained by higher prices, in particular for coconut oil (+66%) and palm kernel oil (+41%), while volumes declined by 3%. This led to a higher import value from the Philippines and Sub-Saharan Africa.

Imports of **beef and veal** increased by EUR 750 million (+28%) and reached EUR 3.4 billion. This is due to both higher volumes (+17%) and prices (+9%). Imports from Mercosur increased by EUR 526 million (+37%) and those from the UK by EUR 174 million (+28%).

EU imports of beef and veal (billion EUR)

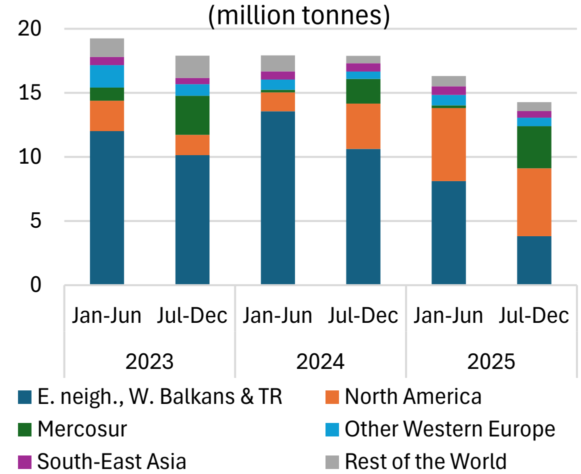


Imports of **non-edible products for technical use** increased by EUR 589 million (+6%) and reached EUR 10.3 billion. This is mainly explained by higher imports of fatty acids and waxes which reached EUR 3.4 billion (+ EUR 559 million, +20%, mainly non-edible oils from China)

IMPORTS OF CEREALS AND OLIVE OIL DECREASED

By contrast, **imports of cereals had the second largest reduction in value** (- EUR 1.1 billion, -11%) and reached EUR 8.7 billion. This was mainly explained by lower volumes as they decreased by 15% and reached 30.6 million tonnes, including 18.6 million tonnes of maize (–8%), 8 million tonnes of wheat (-29%) and 2.5 million tonnes of rice (stable). Prices increased by 3% for maize and 8% for wheat but declined by 6% for rice.

EU cereals imports by origin region (million tonnes)

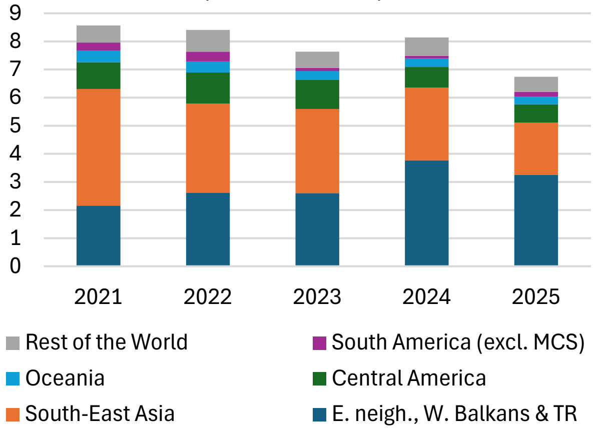


Imports from Ukraine decreased by 11.1 million tonnes (-53%, in both wheat and maize), while they increased by 3.9 million tonnes from the US (+183%, mainly in maize), by 2.1 million tonnes from Canada (+72%, in both wheat and maize) and by 1.4 million tonnes from Brazil (+82%, mainly in maize).

Imports of **olives and olive oil** had the third largest reduction (- EUR 678 million, –39%) and reached EUR 1.1 billion. This was mainly explained by the reduction in prices of olive oil (-44%) after the peak reached in 2024. Volumes of olive oil declined by 4% and those of olives by 19%. This led to lower import values from Tunisia, Türkiye, Egypt and Morocco.

Imports of **vegetable oils** declined by EUR 306 million (-4%) and reached EUR 7.6 billion in 2025. This was mainly explained by lower volumes of palm oil (-22% in volume, - EUR 583 million, -14% in value), while imports of rape and soya oil increased. This led to lower import values from Indonesia and increased value from Ukraine. There was also an increase in imports of palm oil from Colombia.

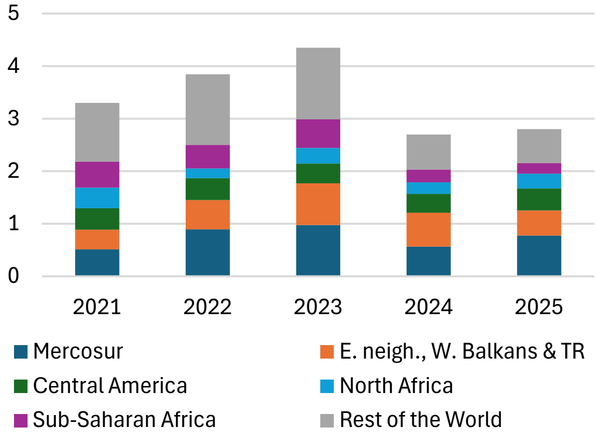
EU imports of vegetable oils by origin region (million tonnes)



Imports of **sugar and isoglucose** decreased by EUR 232 million (-13%) and reached EUR 1.5 billion. This is mainly due to lower prices (-16%). Volumes of white sugar decreased by 197 000 tonnes (-23%), while those of raw sugar increased by 210 000 tonnes (+28%).

There was a 51% reduction in import volumes from Ukraine (-185 000 tonnes), as well as from Sub-Saharan Africa (-39 000 tonnes, -16%), while imports increased from Brazil (+208 000 tonnes, +38%), as well as from Central America (+61 000 tonnes, +17%) and North Africa (+59 000 tonnes, +27%, in particular from Egypt).

EU imports of sugar and isoglucose by origin region (million tonnes)



3 EVOLUTION OF EU TRADE BALANCE

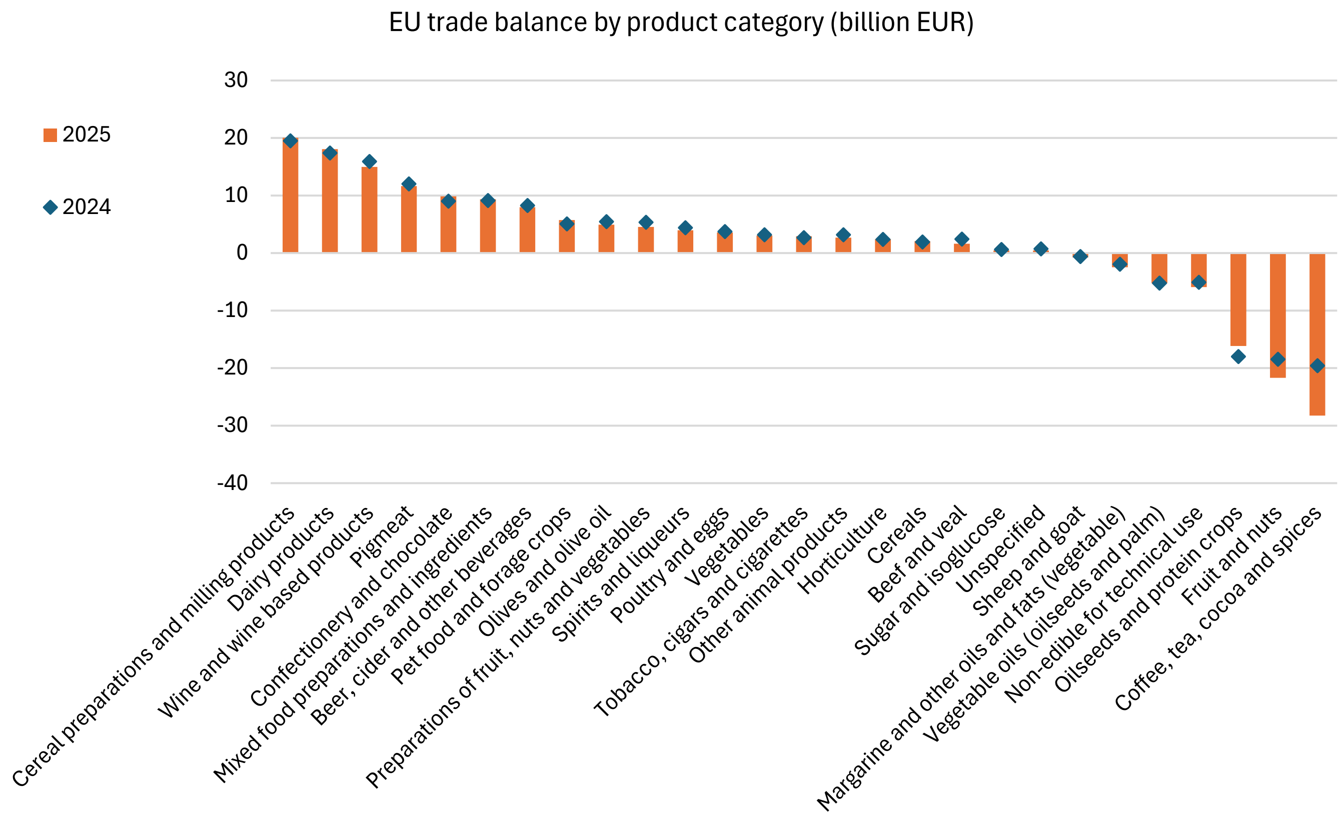
3.1 BY PRODUCT CATEGORY

The EU agri-food trade balance reached a surplus of EUR 49.9 billion in 2025. That is a reduction of EUR 13.3 billion compared to 2024, but still more than four times higher than in 2002 (see graph page 3). Agri-food trade was an important contributor of EU overall trade balance, representing 37% of EU total trade surplus in 2025 (+ EUR 133.5 billion).

The EU remained a net exporter across most product categories, exemplifying the competitiveness of the EU agri-food sector across a diverse range of products and its well diversified structure. The largest trade surpluses corresponded to the most exported categories, including cereal preparations and milling products (net exports of EUR 20.0 billion in 2025), dairy products (EUR 18.0 billion), and wine and wine-based products (EUR 15.0 billion). The EU has a trade deficit in fewer product categories, mainly on coffee, tea, cocoa and spices (net imports of EUR 28.3 billion in 2025), fruits and nuts (EUR 21.7 billion) and oilseeds and protein crops (EUR 16.1 billion).

The erosion of the EU agri-food trade balance in 2025 can be mainly explained by the increased import prices of coffee and cocoa, with the trade balance decreasing by EUR 8.7 billion in the category "coffee, tea, cocoa and spices". The trade balance for fruits and nuts also worsened by EUR 3.2 billion (mainly due to higher import prices and volumes of nuts, and higher prices of "other fruits"), while the surplus in wine and wine-based products declined by EUR 963 million due to lower exports. Other reductions in trade balance could also be observed for non-edible products, beef and veal, and for preparations of fruit, nuts and vegetables.

By contrast, **the EU reduced its trade deficit in oilseeds and protein crops** by EUR 1.9 billion, mainly due to lower import prices. Its trade surplus also increased by EUR 849 million for confectionery and chocolates, by EUR 695 million for pet food and forage crops, and by EUR 688 million for dairy products.



3.2 BY PARTNER REGION

The EU has a large agri-food trade surplus with **non-EU western European countries** (Other Western Europe), with net exports to this region reaching EUR 54.7 billion in 2025 (including + EUR 39.6 billion with the UK). It also has surpluses with North America (+ EUR 16.3 billion), the Middle East (+ EUR 15.7 billion) and East Asia (+ EUR 12.3 billion). By contrast, it has an agri-food trade deficit of – EUR 21.9 billion with Mercosur, - EUR 15.0 billion with Sub-Saharan Africa, - EUR 11.4 billion with the rest of South America and – EUR 9.0 billion with South-East Asia.

In 2025, the EU lowered its agri-food trade deficit with **Eastern neighbourhood, Western Balkans and Türkiye** by EUR 5.1 billion, mainly due to lower imports from Ukraine, and higher exports to Ukraine and Türkiye. The EU reached a trade balance of – EUR 1.9 billion with this region, up from – EUR 9.5 billion in 2022 and the lowest deficit since 2017. Net exports to Other Western Europe also increased by EUR 2.3 billion.

By contrast, the trade deficit with **Sub-Saharan Africa** widened by EUR 6.5 billion in 2025 due to cocoa and coffee prices. This continues a declining trend in EU trade balance with this region since 2022, when EU exports were almost balanced with imports.

EU trade surplus with **North America** decreased by EUR 4.6 billion in 2025, due to lower exports to the US and higher imports from the US and Canada.

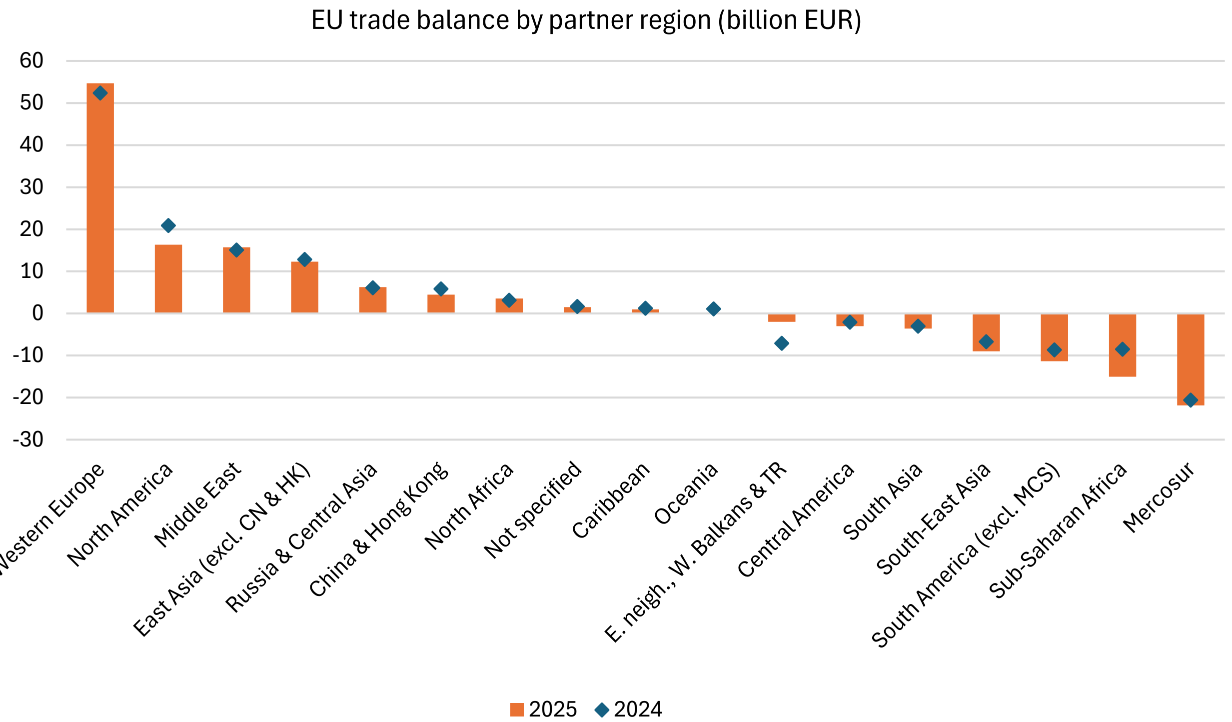
The trade balance with **non-Mercosur South American countries** decreased by EUR 2.7 billion, mainly due to higher import values of coffee, cocoa and fruits.

The balance with **South-East Asia** also declined by EUR 2.3 billion, mainly due to the higher prices and volumes of coffee.

EU surplus with **China & Hong Kong** also declined by EUR 1.4 billion in 2025 to reach EUR 4.5 billion, due to lower EU exports and higher imports, continuing a declining trend since reaching EUR 15.1 billion in 2020.

EU deficit with **Mercosur** widened by EUR 1.3 billion, mainly due to higher coffee prices and beef imports, despite reduced prices of oilseeds imports.

EU trade balance with **Oceania** also declined by EUR 1.1 billion, to become slightly negative, in part due to higher imports of rapeseed.



4 ZOOM ON EU TRADE WITH FTA PARTNERS

FTA PARTNERS NOW REPRESENT A MAJORITY OF EU AGRI-FOOD TRADE

In 2002, partners with which the EU had a preferential trade relation represented together 43% of EU agri-food exports and 26% of EU imports. This includes the UK, Overseas Countries and Territories associated with the EU (OCTs)[1] and partners with which the EU had an agreement in place by 2002 (“FTAs pre-2002”).

Between 2002-2025, new preferential trade agreements between the EU and 61 countries entered into force (“FTAs 2002-2025”). As a result, in 2025, partners with which the EU had a preferential trade relation represented together 61% of EU exports and 57% of EU imports.

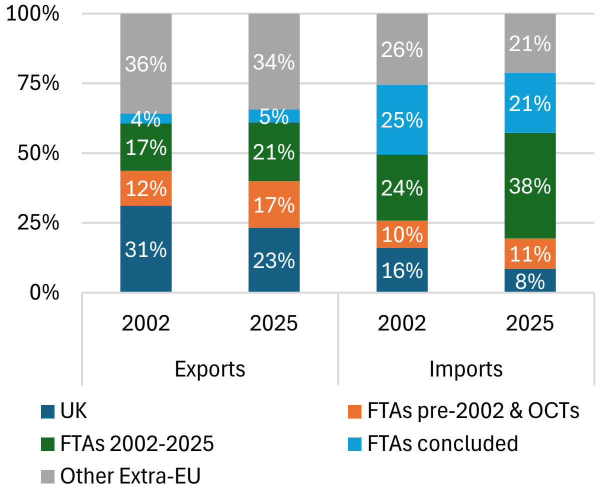
The EU has also concluded negotiations for several agreements, which are in the process of being signed or ratified. These agreements cover 27 partners (“FTAs concluded”), which represented 5% of EU exports and 21% of EU imports in 2025.

TRADE WITH FTAs HAS GROWN FASTER

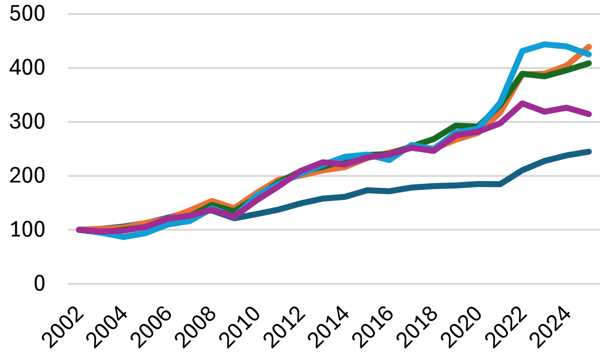
Until 2020, EU agri-food exports were growing broadly at the same rhythm to partners with which the EU had a preferential trade relation or not (except UK). However, EU exports to countries with which the EU have an FTA in force or concluded (FTAs pre-2002 & OCTs, FTAs 2002-2025 and FTAs concluded) have all grown faster between 2020 and 2025 than to other Extra-EU countries, while they had grown at a similar rhythm before.

EU imports from countries with which it had an FTA in place before 2002 or between 2002 and 2025, both grew faster between 2002 and 2025 than to countries with which it has FTAs concluded but not yet in force or to other Extra-EU countries.

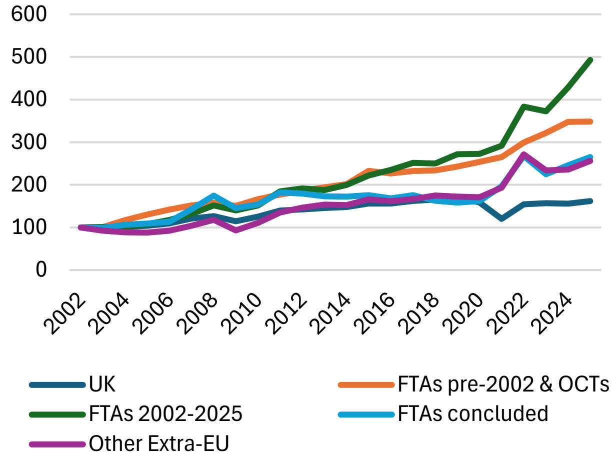
Share in EU agri-food depending on trade relation with the EU in 2002 and 2025



Evolution of EU agri-food export value by trade relation status (Index, 2002=100)



Evolution of EU agri-food import value by trade relation status (Index, 2002=100)



[1] Definition of country groups by trade relation available on page 21.

REGIONS AND PARTNER GROUPS USED

Definition of regions used for the analysis:

Caribbean: Anguilla, Antigua and Barbuda, Aruba, Bahamas, Barbados, Bonaire, Sint Eustatius and Saba, Cayman Islands, Cuba, Curaçao, Dominica, Dominican Republic, Grenada, Haiti, Jamaica, Montserrat, Netherlands Antilles, Saint Barthélemy, Sint Maarten (Dutch part), St Kitts and Nevis, St Lucia, St Vincent and the Grenadines, Trinidad and Tobago, Turks and Caicos Islands, Virgin Islands (British, Virgin Islands (United States).

Central America: Belize, Costa Rica, El Salvador, Guatemala, Honduras, Mexico, Nicaragua, Panama.

China & Hong Kong: China, Hong Kong.

East Asia (excluding China & Hong Kong): Japan, North Korea (Democratic People's Republic Korea), South Korea (Republic of Korea), Macao, Mongolia, Taiwan.

Eastern neighbourhood, Western Balkans & Türkiye: Albania, Armenia, Azerbaijan, Belarus (Belorussia), Bosnia and Herzegovina, Georgia, Kosovo, Moldova (Republic of), Montenegro, North Macedonia, Serbia, Türkiye, Ukraine.

Mercosur: Argentina, Brazil, Paraguay, Uruguay.

Middle East: Bahrain, Iran (Islamic Republic of) Iraq, Israel, Jordan, Kuwait, Lebanon, Occupied Palestinian Territory (West Bank (incl. East Jerusalem) and Gaza Strip), Oman, Qatar, Saudi Arabia, Syrian Arab Republic (Syria), United Arab Emirates, Yemen.

North Africa: Algeria, Egypt, Libya, Morocco, Tunisia, Western Sahara.

North America: Bermuda, Canada, Greenland, St Pierre and Miquelon, United States.

Not specified: Antarctica, Countries and territories not specified, Countries and territories not specified for commercial or military reasons, Countries and territories not specified for commercial or military reasons in the framework of extra-Union trade, Countries and territories not specified within the framework of extra-Union trade, High seas, Stores and provisions, Stores and provisions within the framework of extra-Union trade.

Oceania: American Samoa, Australia, Christmas Island, Cocos Islands (or Keeling Islands), Cook Islands, Fiji, French Polynesia, Guam, Heard Island and McDonald Islands, Kiribati, Marshall Islands, Micronesia (Federated States of) Nauru, New Caledonia, New Zealand, Niue, Norfolk Island, Northern Mariana Islands, Palau, Papua New Guinea, Pitcairn, Samoa, Solomon Islands, Tokelau, Tonga, Tuvalu, United States Minor Outlying Islands, Vanuatu, Wallis and Futuna.

Other Western Europe: Andorra, Ceuta, Faroe Islands, Gibraltar, Holy See (Vatican City State), Iceland, Liechtenstein, Melilla, Norway, San Marino, Switzerland, United Kingdom.

Russia & Central Asia: Kazakhstan, Kyrgyzstan, Russian Federation (Russia), Tajikistan, Turkmenistan, Uzbekistan.

South America (excluding Mercosur): Bolivia (Plurinational State of), Bouvet Island, Chile, Colombia, Ecuador, Falkland Islands (Malvinas), Guyana, Peru, South Georgia and South Sandwich Islands, Suriname, Venezuela (Bolivarian Republic).

South Asia: Afghanistan, Bangladesh, Bhutan, India, Maldives, Nepal, Pakistan, Sri Lanka.

South-East Asia: Brunei Darussalam, Cambodia, Indonesia, Lao People's Democratic Republic (Laos), Malaysia, Myanmar (Burma), Philippines, Singapore, Thailand, Timor-Leste, Viet Nam.

Sub-Saharan Africa: Angola, Benin, Botswana, British Indian Ocean Territory, Burkina Faso, Burundi, Cabo Verde, Cameroon, Central African Republic, Chad, Comoros, Congo, Congo (Democratic Republic of) Côte d'Ivoire (Ivory Coast), Djibouti, Equatorial Guinea, Eritrea, Eswatini (Ngwane), Ethiopia, French Southern Territories, Gabon, Gambia, Ghana, Guinea, Guinea-Bissau, Kenya, Lesotho, Liberia, Madagascar, Malawi, Mali, Mauritania, Mauritius, Mayotte, Mozambique, Namibia, Niger, Nigeria, Rwanda, Saint Helena (Ascension and Tristan da Cunha), Sao Tome and Principe, Senegal, Seychelles, Sierra Leone, Somalia, South Africa, South Sudan, Sudan, Tanzania (United Republic of), Togo, Uganda, Zambia, Zimbabwe.

Definition of partner groups by status of trade relation with the EU:

Partners with preferential trade agreements with the EU in place before 2002 (FTAs pre-2002): Andorra, Faroe Islands, Israel, Iceland, Jordan, Liechtenstein, Morocco, Mexico, Norway, Occupied Palestinian Territory, San Marino, Switzerland, Tunisia, Türkiye.

Overseas Countries and Territories associated with the EU (OCTs): Aruba, Saint Barthélemy, Bonaire, Sint Eustatius and Saba, Curaçao, Greenland, New Caledonia, French Polynesia, St Pierre and Miquelon, Sint Maarten, French Southern Territories, Wallis and Futuna.

Partners with preferential trade agreements with the EU which entered in force in 2002-2025, other than UK (FTAs 2002-2025): Albania, Algeria, Antigua and Barbuda, Bahamas, Barbados, Belize, Bosnia and Herzegovina, Botswana, Cameroon, Canada, Chile, Colombia, Comoros, Costa Rica, Côte d'Ivoire, Dominica, Dominican Republic, Ecuador, Egypt, El Salvador, Eswatini, Fiji, Georgia, Ghana, Grenada, Guatemala, Guyana, Honduras, Jamaica, Japan, Kenya, South Korea Kosovo, Lebanon, Lesotho, Madagascar, Mauritius, Moldova, Montenegro, Mozambique, Namibia, New Zealand, Nicaragua, North Macedonia, Panama, Papua New Guinea, Peru, Samoa, Serbia, Seychelles, Singapore, Solomon Islands, South Africa, St Kitts and Nevis, St Lucia, St Vincent and the Grenadines, Suriname, Trinidad and Tobago, Ukraine, Viet Nam, Zimbabwe.

Partners with which negotiations concluded and agreements are being adopted or ratified (FTAs concluded): Argentina, Benin, Brazil, Burkina Faso, Burundi, Cabo Verde, Gambia, Guinea, Guinea-Bissau, Haiti, India, Indonesia, Kyrgyzstan, Liberia, Mali, Mauritania, Niger, Nigeria, Paraguay, Rwanda, Senegal, Sierra Leone, Tanzania, Togo, Uganda, Uruguay, Uzbekistan.

TABLE 1

EU AGRI-FOOD EXPORTS – COUNTRIES WITH LARGEST CHANGES (million EUR)

TRADE PARTNERS	2023	2024	2025	*Share 2025*	*Difference 2024-2025*	
TOTAL AGRIFOOD	**228 644**	**235 620**	**238 435**	***100%***	***2 815***	***1%***
United Kingdom	51 646	53 999	55 587	*23%*	1 588	*3%*
Switzerland	11 579	12 262	13 180	*6%*	919	*7%*
Türkiye	4 849	5 183	6 016	*3%*	833	*16%*
Ukraine	3 459	3 629	4 264	*2%*	636	*18%*
Norway	5 939	6 032	6 613	*3%*	581	*10%*
Russian Federation	6 756	6 156	5 763	*2%*	- 393	*-6%*
Nigeria	1 664	1 613	1 159	*0%*	- 455	*-28%*
Japan	7 877	8 161	7 661	*3%*	- 500	*-6%*
China	14 602	13 229	12 610	*5%*	- 619	*-5%*
United States	27 199	30 403	28 600	*12%*	-1 803	*-6%*
Other countries	93 074	94 952	96 981	*41%*	2 029	*2%*

TABLE 2

EU AGRI-FOOD EXPORTS - TOP 15 EXPORT COUNTRIES (million EUR)

TRADE PARTNERS	2023	2024	2025	*Share 2025*	*Difference 2024-2025*	
TOTAL AGRIFOOD	**228 644**	**235 620**	**238 435**	***100%***	***2 815***	***1%***
United Kingdom	51 646	53 999	55 587	*23%*	1 588	*3%*
United States	27 199	30 403	28 600	*12%*	- 1 803	*-6%*
Switzerland	11 579	12 262	13 180	*6%*	919	*7%*
China	14 602	13 229	12 610	*5%*	- 619	*-5%*
Japan	7 877	8 161	7 661	*3%*	- 500	*-6%*
Norway	5 939	6 032	6 613	*3%*	581	*10%*
Türkiye	4 849	5 183	6 016	*3%*	833	*16%*
Russian Federation	6 756	6 156	5 763	*2%*	- 393	*-6%*
Canada	4 468	4 803	5 070	*2%*	268	*6%*
Saudi Arabia	4 647	4 642	4 800	*2%*	157	*3%*
Korea, Republic of	4 542	4 262	4 335	*2%*	73	*2%*
Ukraine	3 459	3 629	4 264	*2%*	636	*18%*
Australia	3 770	4 164	4 057	*2%*	- 107	*-3%*
Morocco	3 832	3 634	3 792	*2%*	158	*4%*
United Arab Emirates	3 341	3 371	3 475	*1%*	104	*3%*
Other countries	70 138	71 688	72 611	*30%*	922	*1%*

TABLE 3

EU AGRI-FOOD EXPORTS – PRODUCT CATEGORIES WITH LARGEST CHANGES (million EUR)

AGRI-FOOD CATEGORIES	2023	2024	2025	*Share 2025*	*Difference 2024-2025*	
TOTAL AGRIFOOD	**228 644**	**235 620**	**238 435**	***100%***	***2 815***	***1%***
Coffee, tea, cocoa and spices	8 136	10 732	13 288	*6%*	2 556	*24%*
Confectionery and chocolate	10 761	11 909	13 291	*6%*	1 382	*12%*
Dairy products	19 578	19 633	20 775	*9%*	1 142	*6%*
Cereal preparations and milling products	24 298	24 741	25 385	*11%*	644	*3%*
Tobacco, cigars and cigarettes	7 028	7 778	8 323	*3%*	545	*7%*
Spirits and liqueurs	9 069	8 769	8 259	*3%*	- 510	*-6%*
Preparations of fruit, nuts and vegetables	12 381	12 924	12 320	*5%*	- 605	*-5%*
Cereals	14 610	11 720	10 742	*5%*	- 978	*-8%*
Wine and wine based products	17 606	17 456	16 418	*7%*	-1 037	*-6%*
Olives and olive oil	5 111	7 206	6 017	*3%*	-1 188	*-16%*
Other products	100 065	102 753	103 617	*43%*	864	*1%*

TABLE 4

EU AGRI-FOOD EXPORTS - TOP 15 EXPORT PRODUCT CATEGORIES (million EUR)

AGRI-FOOD CATEGORIES	2023	2024	2025	*Share 2025*	*Difference 2024-2025*	
TOTAL AGRIFOOD	**228 644**	**235 620**	**238 435**	***100%***	***2 815***	***1%***
Cereal preparations and milling products	24 298	24 741	25 385	*11%*	644	*3%*
Dairy products	19 578	19 633	20 775	*9%*	1 142	*6%*
Wine and wine based products	17 606	17 456	16 418	*7%*	- 1 037	*-6%*
Mixed food preparations and ingredients	14 506	15 665	16 059	*7%*	394	*3%*
Confectionery and chocolate	10 761	11 909	13 291	*6%*	1 382	*12%*
Coffee, tea, cocoa and spices	8 136	10 732	13 288	*6%*	2 556	*24%*
Preparations of fruit, nuts and vegetables	12 381	12 924	12 320	*5%*	- 605	*-5%*
Pigmeat	12 265	12 362	11 997	*5%*	- 366	*-3%*
Cereals	14 610	11 720	10 742	*5%*	- 978	*-8%*
Beer, cider and other beverages	10 781	10 837	10 505	*4%*	- 332	*-3%*
Vegetables	8 802	9 334	9 291	*4%*	- 43	*0%*
Pet food and forage crops	8 304	8 461	8 976	*4%*	515	*6%*
Tobacco, cigars and cigarettes	7 028	7 778	8 323	*3%*	545	*7%*
Spirits and liqueurs	9 069	8 769	8 259	*3%*	- 510	*-6%*
Other animal products	8 319	8 259	8 237	*3%*	- 22	*0%*
Other products	42 200	45 040	44 570	*19%*	- 470	*-1%*

TABLE 5

EU AGRI-FOOD IMPORTS – COUNTRIES WITH LARGEST CHANGES (million EUR)

TRADE PARTNERS	2023	2024	2025	*Share 2025*	*Difference 2024-2025*	
TOTAL AGRIFOOD	**159 434**	**172 416**	**188 566**	***100%***	***16 150***	***9%***
Côte d'Ivoire	4 055	6 759	8 868	*5%*	2 108	*31%*
Canada	2 845	2 549	4 352	*2%*	1 803	*71%*
Viet Nam	3 212	3 838	5 334	*3%*	1 496	*39%*
United States	11 686	11 963	13 204	*7%*	1 241	*10%*
Ghana	1 306	1 725	2 910	*2%*	1 185	*69%*
Tunisia	886	1 291	995	*1%*	- 296	*-23%*
Indonesia	5 474	5 426	5 126	*3%*	- 299	*-6%*
Türkiye	6 627	7 314	6 976	*4%*	- 338	*-5%*
Russian Federation	1 892	1 048	352	*0%*	- 696	*-66%*
Ukraine	11 840	13 194	10 625	*6%*	-2 569	*-19%*
Other countries	109 612	117 309	129 823	*69%*	12 515	*11%*

TABLE 6

EU AGRI-FOOD IMPORTS - TOP 15 IMPORT COUNTRIES (million EUR)

TRADE PARTNERS	2023	2024	2025	*Share 2025*	*Difference 2024-2025*	
TOTAL AGRIFOOD	**159 434**	**172 416**	**188 566**	***100%***	***16 150***	***9%***
Brazil	17 216	17 468	18 592	*10%*	1 123	*6%*
United Kingdom	15 515	15 392	16 004	*8%*	612	*4%*
United States	11 686	11 963	13 204	*7%*	1 241	*10%*
Ukraine	11 840	13 194	10 625	*6%*	- 2 569	*-19%*
China	8 347	9 175	9 929	*5%*	755	*8%*
Côte d'Ivoire	4 055	6 759	8 868	*5%*	2 108	*31%*
Türkiye	6 627	7 314	6 976	*4%*	- 338	*-5%*
Argentina	4 663	5 570	5 604	*3%*	34	*1%*
Viet Nam	3 212	3 838	5 334	*3%*	1 496	*39%*
Switzerland	4 859	5 046	5 261	*3%*	215	*4%*
Indonesia	5 474	5 426	5 126	*3%*	- 299	*-6%*
Peru	3 089	3 769	4 623	*2%*	854	*23%*
India	3 303	3 978	4 430	*2%*	452	*11%*
Canada	2 845	2 549	4 352	*2%*	1 803	*71%*
Morocco	3 182	3 460	3 732	*2%*	272	*8%*
Other countries	53 521	57 515	65 907	*35%*	8 391	*15%*

TABLE 7

EU AGRI-FOOD IMPORTS – PRODUCT CATEGORIES WITH LARGEST CHANGES (million EUR)

AGRI-FOOD CATEGORIES	2023	2024	2025	*Share 2025*	*Difference 2024-2025*	
TOTAL AGRIFOOD	**159 434**	**172 416**	**188 566**	***100%***	***16 150***	***9%***
Coffee, tea, cocoa and spices	20 563	30 326	41 547	*22%*	11 221	*37%*
Fruit and nuts	22 336	24 953	28 672	*15%*	3 719	*15%*
Margarine and other oils and fats (vegetable)	3 907	4 178	4 941	*3%*	763	*18%*
Beef and veal	2 441	2 645	3 395	*2%*	750	*28%*
Non-edible for technical use	9 393	9 683	10 273	*5%*	589	*6%*
Sugar and isoglucose	2 797	1 744	1 512	*1%*	- 232	*-13%*
Vegetable oils (oilseeds and palm)	7 708	7 856	7 549	*4%*	- 306	*-4%*
Olives and olive oil	1 226	1 752	1 074	*1%*	- 678	*-39%*
Cereals	11 691	9 796	8 680	*5%*	-1 116	*-11%*
Oilseeds and protein crops	21 142	20 129	18 521	*10%*	-1 608	*-8%*
Other products	56 231	59 353	62 401	*33%*	3 048	*5%*

TABLE 8

EU AGRI-FOOD IMPORTS - TOP 15 IMPORT PRODUCT CATEGORIES (million EUR)

AGRI-FOOD CATEGORIES	2023	2024	2025	*Share 2025*	*Difference 2024-2025*	
TOTAL AGRIFOOD	**159 434**	**172 416**	**188 566**	***100%***	***16 150***	***9%***
Coffee, tea, cocoa and spices	20 563	30 326	41 547	*22%*	11 221	*37%*
Fruit and nuts	22 336	24 953	28 672	*15%*	3 719	*15%*
Oilseeds and protein crops	21 142	20 129	18 521	*10%*	- 1 608	*-8%*
Non-edible for technical use	9 393	9 683	10 273	*5%*	589	*6%*
Cereals	11 691	9 796	8 680	*5%*	- 1 116	*-11%*
Preparations of fruit, nuts and vegetables	6 730	7 591	7 768	*4%*	177	*2%*
Vegetable oils (oilseeds and palm)	7 708	7 856	7 549	*4%*	- 306	*-4%*
Mixed food preparations and ingredients	5 966	6 544	6 712	*4%*	168	*3%*
Vegetables	5 863	6 173	6 241	*3%*	68	*1%*
Other animal products	5 412	5 080	5 549	*3%*	469	*9%*
Tobacco, cigars and cigarettes	4 733	5 105	5 384	*3%*	279	*5%*
Cereal preparations and milling products	4 806	5 242	5 349	*3%*	106	*2%*
Margarine and other oils and fats (vegetable)	3 907	4 178	4 941	*3%*	763	*18%*
Spirits and liqueurs	4 517	4 380	4 306	*2%*	- 74	*-2%*
Confectionery and chocolate	2 390	2 903	3 436	*2%*	533	*18%*
Other products	22 277	22 476	23 639	*13%*	1 163	*5%*

TABLE 9
EU AGRI-FOOD TRADE BALANCE (million EUR)

AGRI-FOOD CATEGORIES/PERIOD	EXPORTS	IMPORTS	TRADE BALANCE		
	2025		2024	2025	Difference
	million EUR				
Total Agrifood	**238 435**	**188 566**	**63 205**	**49 869**	**-13 335**
Cereal preparations and milling products	25 385	5 349	19 499	20 037	538
Dairy products	20 775	2 711	17 377	18 064	688
Wine and wine based products	16 418	1 449	15 913	14 970	- 943
Pigmeat	11 997	355	12 002	11 642	- 360
Confectionery and chocolate	13 291	3 436	9 006	9 855	849
Mixed food preparations and ingredients	16 059	6 712	9 121	9 347	226
Beer, cider and other beverages	10 505	2 546	8 264	7 959	- 305
Pet food and forage crops	8 976	3 231	5 050	5 745	695
Olives and olive oil	6 017	1 074	5 453	4 943	- 510
Preparations of fruit, nuts and vegetables	12 320	7 768	5 333	4 552	- 781
Spirits and liqueurs	8 259	4 306	4 389	3 953	- 436
Poultry and eggs	6 525	2 946	3 730	3 579	- 151
Vegetables	9 291	6 241	3 161	3 050	- 111
Tobacco, cigars and cigarettes	8 323	5 384	2 673	2 939	266
Other animal products	8 237	5 549	3 178	2 688	- 491
Horticulture	4 691	2 254	2 357	2 437	80
Cereals	10 742	8 680	1 924	2 062	138
Beef and veal	5 009	3 395	2 408	1 614	- 794
Sugar and isoglucose	1 976	1 512	607	463	- 144
Unspecified	1 034	582	733	452	- 280
Sheep and goat	812	1 584	- 604	- 771	- 167
Margarine and other oils and fats (vegetable)	2 473	4 941	-1 952	-2 468	- 516
Vegetable oils (oilseeds and palm)	2 307	7 549	-5 247	-5 242	4
Non-edible for technical use	4 365	10 273	-5 097	-5 907	- 810
Oilseeds and protein crops	2 371	18 521	-18 011	-16 150	1 861
Fruit and nuts	6 989	28 672	-18 467	-21 684	-3 216
Coffee, tea, cocoa and spices	13 288	41 547	-19 594	-28 259	-8 665
For info: fish and fish products	*8 156*	*31 630*	*-22 030*	*-23 474*	*-1 444*
Total agrifood and fish	*246 592*	*220 196*	*41 175*	*26 395*	*-14 779*

X (former Twitter): @EUAgri
https://ec.europa.eu/agriculture
#AgriFoodTrade