



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS until June 2026

CONTENTS

HIGHLIGHTS

EU AGRI-FOOD EXPORTS

EU AGRI-FOOD IMPORTS

TABLES

EDITORIAL

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

Email: Agri-Trade-Analysis@ec.europa.eu

Website:

https://agriculture.ec.europa.eu/international/agricultural-trade/trade-and-international-policy-analysis_en

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Note to the reader

Monthly figures are compared with the previous month (i.e. month-on-month). Year-on-year change compares the cumulative trade since the beginning of the year with the same period in the previous year.

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 categories used in this report are available online (https://agriculture.ec.europa.eu/international/agricultural-trade/trade-and-international-policy-analysis_en#reference-files).

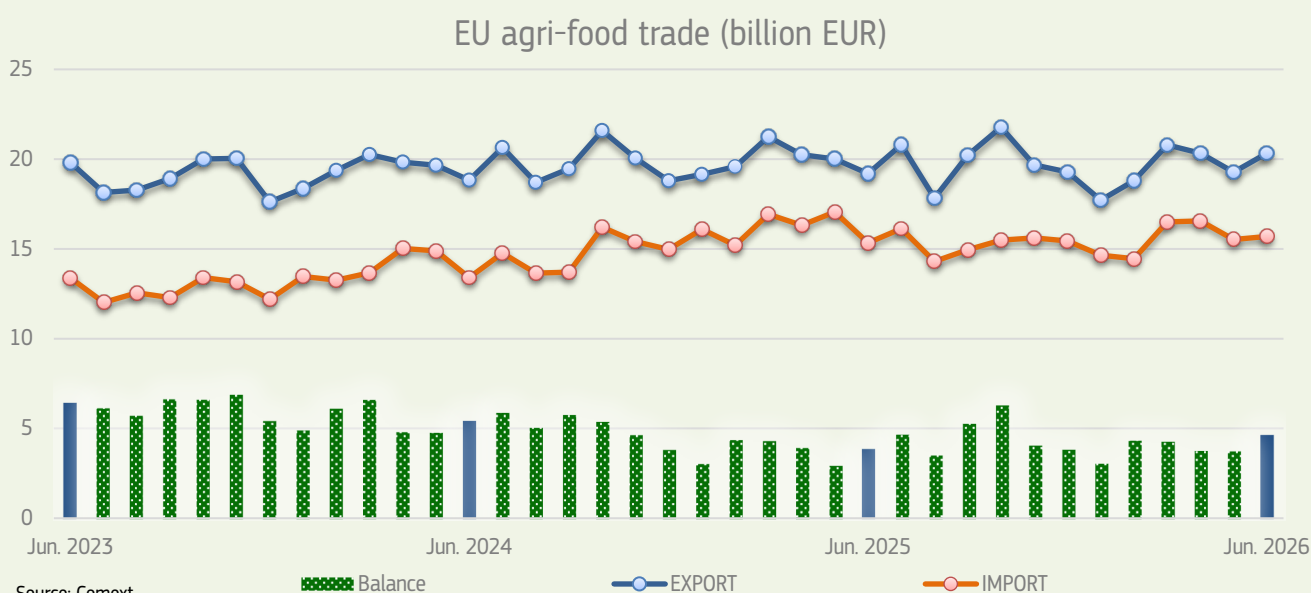
To access more data and figures behind this report, visit the dedicated trade app on the Agri-food Data Portal: [Overview of EU agri-food trade](#).

HIGHLIGHTS: EU agri-food trade surplus expands in the first half of 2026

In June 2026, the EU exported EUR 20.3 billion agri-food products, 5% more than in the previous month and 6% above June 2025. Cumulative exports in 2026 declined by 2% year-on-year, most significantly to the US, following high levels in 2025. Exports contracted particularly for cocoa paste, butter and powder (in volume and prices), pigmeat (mostly in prices, but also due to decreasing volumes to China and Japan) and olive oil (also in volume and prices).

The EU imported agri-food products worth EUR 15.7 billion in June, up 1% from the previous month and 2% above last year. Cumulative 2026 imports declined by 4% year-on-year, driven by lower prices of cocoa products. Imports also contracted for cereals (lower wheat volumes, and lower prices and volumes for rice), as well as for oilseeds and protein crops. The largest increase in imports was for fruit and nuts.

The EU agri-food trade surplus increased by 24% month-on-month in June, to EUR 4.6 billion, 20% above the figure of June 2025. The cumulative surplus in the first half of 2026 widened to EUR 23.9 billion, EUR 1.4 billion more than a year before, supported by falling cocoa prices.



EU AGRI-FOOD EXPORTS

In June 2026, the EU exported **EUR 20.3 billion in agri-food products, up 5% month-on-month and 6% year-on-year. Since January, cumulative exports reached EUR 117.2 billion, 2% below last year (- EUR 2.2. billion), mostly due to reduced exports of cocoa, pigmeat and olive oil.**

EXPORTS TO PERSIAN GULF NEAR AVERAGE LEVELS IN JUNE

The main export reduction in the first half of 2026 was to the **US** (-11%, - EUR 1.7 billion). This follows high export levels in the first months of 2025 with potential frontloading ahead of the announced US tariffs. The most significant reductions were in drinks (mainly due to lower prices), olive oil (lower volumes and prices) and cocoa products (mainly lower volumes).

The second largest export reduction was to the **UK** (-3%, - EUR 837 million) with decreases in pigmeat (-13%), cocoa products (-44%, due to falling prices), cereals (-26%, due to lower volumes), dairy (-6%, due to reduced prices) and vegetable preparations (-7%, also due to lower prices). By contrast, export volumes of rape oil doubled.

Exports to **Japan** also decreased (-12%, - EUR 492 million), driven by lower prices of tobacco and lower pigmeat volumes, following the African Swine Fever outbreak in Spain in November 2025.

The closure of the Strait of Hormuz from March 2026 reduced exports to **United Arab Emirates** (-25%, - EUR 395 million), as well as to other Gulf countries with smaller flows. In June 2026 export

figures were almost back to average levels.

By contrast, exports to **Egypt** rose significantly in the first half of 2026 (+28%, + EUR 278 million), mostly due to increased wheat exports. Exports to **Ukraine** also grew by EUR 247 million (+12%), with the largest increase in spirits. Exports to **India** grew by EUR 174 million (+26%) most due to sunflower oil shipments.

INCREASED EXPORTS OF SPIRITS AND LIQUEURS

Exports in the category **coffee, tea, cocoa and spices** saw the largest decrease in value, down EUR 1.1 billion (-16%) in the first half of 2026, mainly driven by reduced volumes (-13%) and prices (-28%) of cocoa paste, butter and powder.

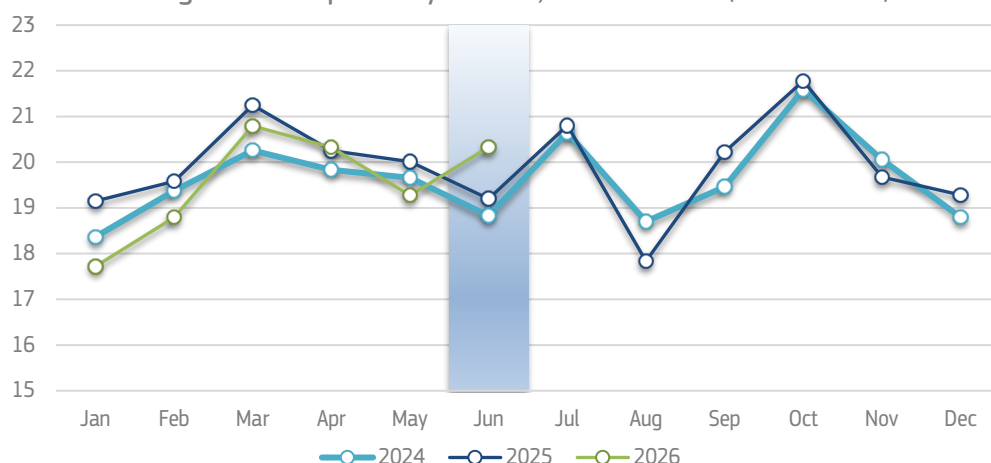
Exports of **pigmeat** also decreased by EUR 773 million (-12%) mostly due to lower prices and falling volumes to China, Japan, Philippines and the UK.

Exports of **olives and olive oil** fell by EUR 432 million (-13%), due to lower olive oil prices (-6%) and volumes (-7%), in particular to the US, but also to Canada, Australia and Japan.

Exports of **preparations of fruit, nuts and vegetables** also decreased by EUR 368 million (-6%), mostly due to lower prices of potatoes preparations.

The main increase in exports was in **spirits and liqueurs** (+ EUR 405 million, +10%), mostly to Ukraine and Kazakhstan (higher prices) and Russian (larger volumes).

EU agri-food exports by month, 2024-2026 (billion EUR)



EU AGRI-FOOD IMPORTS

The EU imported EUR 15.7 billion in agri-food products in June 2026, up 1% month-on-month and 2% year-on-year. Cumulative imports since January were EUR 93.4 billion, 4% below the year before (- EUR 3.6 billion), mostly due to reduced imports of cocoa products, cereals and soya cake.

COCOA PRICES STILL DECREASING

The main driver of the reduced import value in 2026 is the falling cocoa prices. As a result, imports from the most important cocoa-producing countries decreased in the first half of 2026:

Côte d'Ivoire (-19%, - EUR 942 million),
Nigeria (-46%, - EUR 567 million),
Cameroon (-43%, - EUR 536 million) and
Guinea (-94%, - EUR 250 million).

Imports from **Canada** also declined by 20% (- EUR 473 million), primarily due to lower import volumes of maize, and lower import volumes and prices of wheat.

Imports from the **UK** decreased by 5% (- EUR 425 million), with reductions across most product categories, particularly dairy, cocoa products and cereals.

By contrast, imports from **Brazil** increased year-on-year by 5% (+ EUR 425 million) mostly due to increased soya beans imports. Imports from **Argentina** grew by 11% (+ EUR 281 million) due to higher imports of sunflower seeds, while

imports from **Guatemala** grew by 37% (+ EUR 194 million), mainly due to larger volumes of palm oil and coffee.

LOWER SOYA CAKE IMPORTS

Imports in the category **coffee, tea, cocoa and spices** declined the most in the first half of 2026, down EUR 3.6 billion (-17%). This is mostly due to the decreasing prices of cocoa products (-26%), that reduced import value by EUR 3.0 billion, while volumes fell by 3%. Coffee imports also decreased (-5%, - EUR 440 million) mostly due to reduced volumes from Brazil (-15%, - EUR 474 million) and Colombia (-18%, - EUR 122 million).

Imports of **cereals** followed with a decrease of EUR 715 million (-15%), mostly due to reductions in wheat (- EUR 449 million, -35%, mostly in volumes) and rice (- EUR 194 million, -19%, in volumes and prices).

Imports of **oilseeds and protein crops** decreased by EUR 345 million (-3%). The reduction is primarily in soya cake from Brazil, Argentina and India, partially compensated by increased volumes from the US. By contrast, imports of sunflower seeds, mostly from Argentina, doubled following two poor crop years in the EU. Imports of soya beans were stable, with decreases from the US compensated with increases from Brazil.

Imports grew the most in the category **fruit and nuts** (+ EUR 503 million, +3%), with increases spread across different products.

EU agri-food imports by month, 2024-2026 (billion EUR)

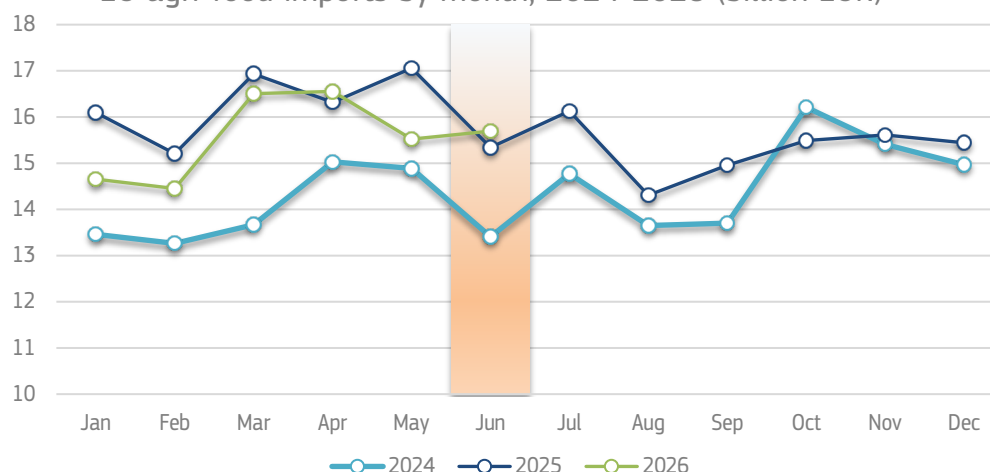


TABLE 1

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

TRADING PARTNERS	yearly data			monthly data			
	2024	2025	Share 2025	Jan25-Jun25	Jan26-Jun26	Difference	
TOTAL AGRI-FOOD	235 572	239 047	100%	119 445	117 236	- 2 209	-2%
Egypt	2 034	2 168	1%	981	1 258	278	28%
Ukraine	3 628	4 272	2%	2 073	2 320	247	12%
India	1 335	1 323	1%	682	856	174	26%
Kazakhstan	788	821	0%	425	562	138	32%
Norway	5 999	6 518	3%	3 324	3 460	135	4%
Morocco	3 634	3 787	2%	1 920	1 722	- 198	-10%
United Arab Emirates	3 371	3 475	1%	1 591	1 195	- 395	-25%
Japan	8 164	7 658	3%	4 073	3 580	- 492	-12%
United Kingdom	53 964	55 742	23%	27 803	26 966	- 837	-3%
United States	30 419	28 624	12%	15 203	13 462	-1 740	-11%
Other countries	122 236	124 659	52%	61 371	61 853	483	1%

TABLE 2

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

TRADING PARTNERS	yearly data			monthly data			
	2024	2025	Share 2025	Jan25-Jun25	Jan26-Jun26	Difference	
TOTAL AGRI-FOOD	235 572	239 047	100%	119 445	117 236	- 2 209	-2%
United Kingdom	53 964	55 742	23%	27 803	26 966	- 837	-3%
United States	30 419	28 624	12%	15 203	13 462	- 1 740	-11%
Switzerland	12 261	13 174	6%	6 787	6 855	68	1%
China	13 229	12 609	5%	6 320	6 124	- 196	-3%
Japan	8 164	7 658	3%	4 073	3 580	- 492	-12%
Norway	5 999	6 518	3%	3 324	3 460	135	4%
Türkiye	5 179	6 032	3%	3 117	3 247	130	4%
Russian Federation	6 155	5 889	2%	2 867	2 756	- 111	-4%
Canada	4 801	5 073	2%	2 355	2 391	36	2%
Ukraine	3 628	4 272	2%	2 073	2 320	247	12%
Saudi Arabia	4 642	4 803	2%	2 206	2 224	18	1%
Korea, Republic of	4 261	4 336	2%	2 163	2 175	12	1%
Australia	4 163	4 056	2%	1 962	1 939	- 23	-1%
Israel	2 992	3 350	1%	1 699	1 769	70	4%
Morocco	3 634	3 787	2%	1 920	1 722	- 198	-10%
Other countries	72 081	73 124	31%	35 572	36 244	673	2%

TABLE 3

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

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	2024	2025	Share 2025	Jan25-Jun25	Jan26-Jun26	Difference	
TOTAL AGRI-FOOD	235 572	239 047	100%	119 445	117 236	- 2 209	-2%
Spirits and liqueurs	8 769	8 360	3%	4 020	4 425	405	10%
Fruit and nuts	6 484	7 111	3%	3 494	3 778	284	8%
Other animal products	8 274	8 258	3%	4 123	4 392	269	7%
Vegetable oils (oilseeds and palm)	2 583	2 307	1%	1 185	1 434	249	21%
Pet food and forage crops	8 458	8 976	4%	4 454	4 692	237	5%
Wine and wine based products	17 455	16 500	7%	8 173	7 844	- 330	-4%
Preparations of fruit, nuts and vegetables	12 934	12 409	5%	6 328	5 961	- 368	-6%
Olives and olive oil	7 206	6 026	3%	3 245	2 812	- 432	-13%
Pigmeat	12 371	12 011	5%	6 208	5 435	- 773	-12%
Coffee, tea, cocoa and spices	10 722	13 290	6%	6 735	5 630	-1 105	-16%
Other products	140 316	143 799	60%	71 479	70 834	- 645	-1%

TABLE 4

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

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	2024	2025	Share 2025	Jan25-Jun25	Jan26-Jun26	Difference	
TOTAL AGRI-FOOD	235 572	239 047	100%	119 445	117 236	- 2 209	-2%
Cereal preparations and milling products	24 709	25 405	11%	12 415	12 241	- 174	-1%
Dairy products	19 630	20 738	9%	10 219	10 227	9	0%
Mixed food preparations and ingredients	15 663	16 052	7%	7 979	7 997	18	0%
Wine and wine based products	17 455	16 500	7%	8 173	7 844	- 330	-4%
Preparations of fruit, nuts and vegetables	12 934	12 409	5%	6 328	5 961	- 368	-6%
Confectionery and chocolate	11 892	13 262	6%	6 089	5 800	- 288	-5%
Coffee, tea, cocoa and spices	10 722	13 290	6%	6 735	5 630	- 1 105	-16%
Pigmeat	12 371	12 011	5%	6 208	5 435	- 773	-12%
Beer, cider and other beverages	10 835	10 511	4%	5 334	5 242	- 92	-2%
Cereals	11 719	10 748	4%	5 150	5 164	13	0%
Vegetables	9 330	9 330	4%	4 863	4 735	- 127	-3%
Pet food and forage crops	8 458	8 976	4%	4 454	4 692	237	5%
Spirits and liqueurs	8 769	8 360	3%	4 020	4 425	405	10%
Other animal products	8 274	8 258	3%	4 123	4 392	269	7%
Tobacco, cigars and cigarettes	7 778	8 327	3%	4 318	4 026	- 292	-7%
Other products	45 032	44 868	19%	23 036	23 425	389	2%

TABLE 5

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

TRADING PARTNERS	yearly data			monthly data			
	2024	2025	Share 2025	Jan25-Jun25	Jan26-Jun26	Difference	
TOTAL AGRI-FOOD	172 423	188 889	100%	96 954	93 384	- 3 570	-4%
Brazil	17 468	18 594	10%	9 143	9 569	425	5%
Argentina	5 570	5 610	3%	2 568	2 849	281	11%
Guatemala	1 098	1 188	1%	523	718	194	37%
Egypt	2 327	2 418	1%	1 468	1 632	163	11%
Viet Nam	3 838	5 334	3%	2 809	2 966	157	6%
United Kingdom	15 391	16 010	8%	7 783	7 358	- 425	-5%
Canada	2 549	4 351	2%	2 377	1 904	- 473	-20%
Cameroon	1 560	2 284	1%	1 243	706	- 536	-43%
Nigeria	1 685	2 135	1%	1 225	658	- 567	-46%
Côte d'Ivoire	6 759	8 872	5%	5 056	4 114	- 942	-19%
Other countries	114 177	122 093	65%	62 759	60 912	-1 847	-3%

TABLE 6

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

TRADING PARTNERS	yearly data			monthly data			
	2024	2025	Share 2025	Jan25-Jun25	Jan26-Jun26	Difference	
TOTAL AGRI-FOOD	172 423	188 889	100%	96 954	93 384	- 3 570	-4%
Brazil	17 468	18 594	10%	9 143	9 569	425	5%
United Kingdom	15 391	16 010	8%	7 783	7 358	- 425	-5%
United States	11 964	13 218	7%	6 939	6 532	- 407	-6%
Ukraine	13 194	10 626	6%	5 732	5 591	- 141	-2%
China	9 179	9 944	5%	5 254	5 157	- 97	-2%
Côte d'Ivoire	6 759	8 872	5%	5 056	4 114	- 942	-19%
Türkiye	7 314	6 978	4%	3 676	3 484	- 192	-5%
Viet Nam	3 838	5 334	3%	2 809	2 966	157	6%
Argentina	5 570	5 610	3%	2 568	2 849	281	11%
Switzerland	5 046	5 262	3%	2 509	2 473	- 36	-1%
Morocco	3 460	3 753	2%	2 448	2 461	13	1%
Indonesia	5 426	5 207	3%	2 356	2 300	- 56	-2%
India	3 978	4 434	2%	2 334	2 031	- 302	-13%
Canada	2 549	4 351	2%	2 377	1 904	- 473	-20%
Peru	3 769	4 633	2%	1 924	1 858	- 66	-3%
Other countries	57 518	66 063	35%	34 047	32 739	- 1 308	-4%

TABLE 7

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2024	2025	Share 2025	Jan25-Jun25	Jan26-Jun26	Difference	
TOTAL AGRI-FOOD	172 423	188 889	100%	96 954	93 384	- 3 570	-4%
Fruit and nuts	24 953	28 750	15%	14 610	15 113	503	3%
Beef and veal	2 645	3 416	2%	1 449	1 776	327	23%
Margarine and other oils and fats (vegetable)	4 178	4 933	3%	2 270	2 569	300	13%
Non-edible for technical use	9 681	10 369	5%	5 242	5 500	258	5%
Poultry and eggs	2 412	2 951	2%	1 547	1 754	207	13%
Confectionery and chocolate	2 903	3 435	2%	1 649	1 419	- 230	-14%
Dairy products	2 257	2 719	1%	1 384	1 129	- 254	-18%
Oilseeds and protein crops	20 129	18 560	10%	9 937	9 592	- 345	-3%
Cereals	9 796	8 669	5%	4 820	4 105	- 715	-15%
Coffee, tea, cocoa and spices	30 325	41 575	22%	21 538	17 978	-3 559	-17%
Other products	63 144	63 512	34%	32 509	32 447	- 62	0%

TABLE 8

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2024	2025	Share 2025	Jan25-Jun25	Jan26-Jun26	Difference	
TOTAL AGRI-FOOD	172 423	188 889	100%	96 954	93 384	- 3 570	-4%
Coffee, tea, cocoa and spices	30 325	41 575	22%	21 538	17 978	- 3 559	-17%
Fruit and nuts	24 953	28 750	15%	14 610	15 113	503	3%
Oilseeds and protein crops	20 129	18 560	10%	9 937	9 592	- 345	-3%
Non-edible for technical use	9 681	10 369	5%	5 242	5 500	258	5%
Cereals	9 796	8 669	5%	4 820	4 105	- 715	-15%
Preparations of fruit, nuts and vegetables	7 591	7 768	4%	3 802	3 834	32	1%
Vegetable oils (oilseeds and palm)	7 856	7 575	4%	3 743	3 640	- 104	-3%
Vegetables	6 173	6 242	3%	3 657	3 595	- 62	-2%
Mixed food preparations and ingredients	6 545	6 723	4%	3 377	3 380	3	0%
Other animal products	5 080	5 558	3%	2 770	2 790	20	1%
Tobacco, cigars and cigarettes	5 105	5 387	3%	2 850	2 725	- 125	-4%
Cereal preparations and milling products	5 242	5 342	3%	2 718	2 677	- 41	-2%
Margarine and other oils and fats (vegetable)	4 178	4 933	3%	2 270	2 569	300	13%
Spirits and liqueurs	4 380	4 318	2%	2 052	2 168	116	6%
Beef and veal	2 645	3 416	2%	1 449	1 776	327	23%
Other products	22 744	23 706	13%	12 120	11 941	- 179	-1%

TABLE 9

EU AGRI-FOOD TRADE BALANCE (million EUR)

	EXPORTS	IMPORTS	TRADE BALANCE		
AGRI-FOOD CATEGORIES/PERIOD	Jan26-Jun26		Jan25-Jun25	Jan26-Jun26	Difference
	million EUR				
Total Agrifood	117 236	93 384	22 491	23 852	1 361
Cereal preparations and milling products	12 241	2 677	9 697	9 564	- 133
Dairy products	10 227	1 129	8 835	9 098	263
Wine and wine based products	7 844	671	7 454	7 173	- 281
Pigmeat	5 435	175	6 035	5 260	- 775
Mixed food preparations and ingredients	7 997	3 380	4 603	4 617	14
Confectionery and chocolate	5 800	1 419	4 440	4 381	- 58
Beer, cider and other beverages	5 242	1 200	4 089	4 042	- 47
Pet food and forage crops	4 692	1 604	2 768	3 088	320
Spirits and liqueurs	4 425	2 168	1 968	2 257	289
Preparations of fruit, nuts and vegetables	5 961	3 834	2 527	2 127	- 400
Olives and olive oil	2 812	775	2 640	2 037	- 603
Other animal products	4 392	2 790	1 353	1 602	249
Poultry and eggs	3 147	1 754	1 631	1 392	- 239
Horticulture	2 594	1 251	1 361	1 343	- 18
Tobacco, cigars and cigarettes	4 026	2 725	1 468	1 301	- 167
Vegetables	4 735	3 595	1 206	1 140	- 66
Cereals	5 164	4 105	330	1 059	728
Beef and veal	2 716	1 776	1 132	940	- 192
Unspecified	500	231	248	270	22
Sugar and isoglucose	944	814	362	130	- 232
Sheep and goat	569	917	- 368	- 348	20
Margarine and other oils and fats (vegetable)	1 295	2 569	-1 049	-1 275	- 226
Vegetable oils (oilseeds and palm)	1 434	3 640	-2 559	-2 206	353
Non-edible for technical use	2 508	5 500	-2 966	-2 992	- 26
Oilseeds and protein crops	1 127	9 592	-8 794	-8 465	329
Fruit and nuts	3 778	15 113	-11 116	-11 335	- 219
Coffee, tea, cocoa and spices	5 630	17 978	-14 803	-12 348	2 454
For info: fish and fish products	3 955	15 531	-11 456	-11 576	- 119
Total agrifood and fish	121 191	108 915	11 034	12 276	1 242

X (former Twitter): @EUAgri
<https://ec.europa.eu/agriculture>
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