



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS in June 2025

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Note to the reader

The latest available consolidated trade data at EU level cover market developments up to June 2025. Monthly figures are compared with the previous 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 values, 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).

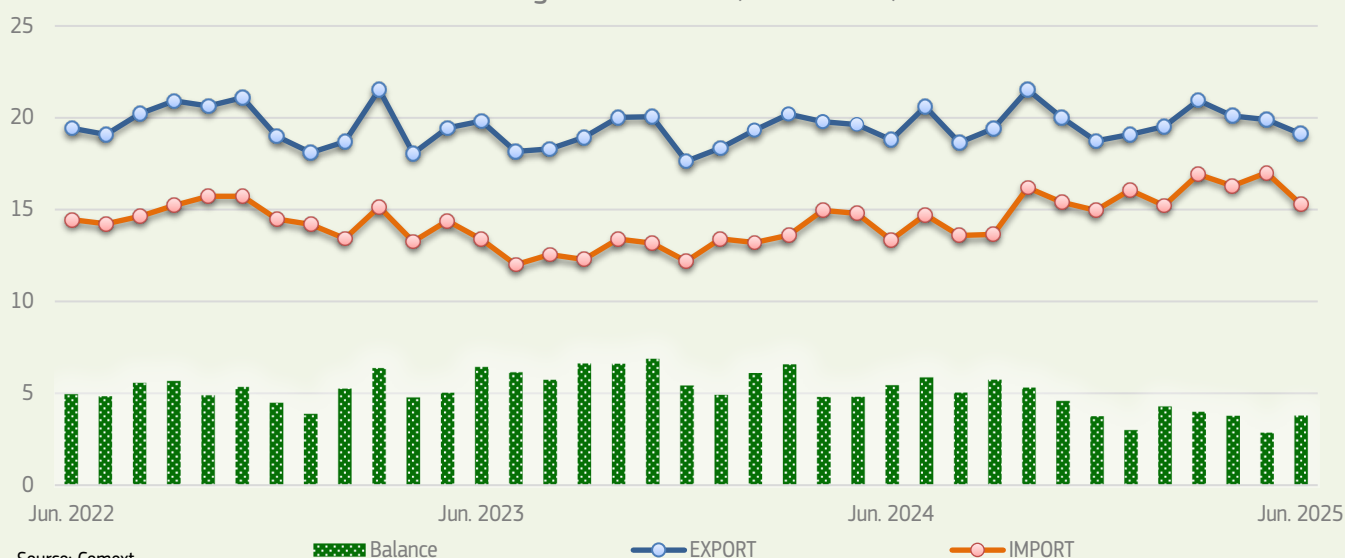
HIGHLIGHTS: EU exports remained stable in the first half of 2025, while import prices increased

EU exports reached EUR 19.1 billion in June 2025, a reduction of 4% on the previous month but still 2% higher than in June 2024. Over the first semester of 2025, cumulative EU exports reached EUR 118.7 billion, this is 2% higher than in the same period in 2024. Prices for exports of cocoa-based products remained high, while exports of cereals declined.

EU imports decreased by 10% month-on-month in June, reaching EUR 15.3 billion. However, they remain 15% higher than in June 2024. In the first half of the year, cumulative imports reached EUR 96.8 billion, up 16% compared to the same period in 2024. This is explained by high import prices, in particular for cocoa and coffee, as well as fruit and nuts. Imports from Côte d'Ivoire and Canada had the largest increase.

The EU agri-food trade surplus rebounded by 32% in June compared to the previous month and reached EUR 3.8 billion. It remains however 30% lower than in June 2024. In the first half of 2025, the EU surplus reached EUR 21.9 billion. This is a reduction of EUR 10.9 billion compared to the same period in 2024, primarily due to increases in the prices of EU imports.

EU agri-food trade (billion EUR)



Source: Comext



EU AGRI-FOOD EXPORTS

EU agri-food exports reached EUR 19.1 billion in June 2025, a reduction of 4% on the previous month, but still 2% higher than in June 2024. In the first six months of the year, cumulative EU exports reached EUR 118.7 billion, an increase of 2% (+ EUR 2.6 billion) compared to the same period in 2024, mainly due to higher prices.

HIGHER EXPORTS TO THE UK, LOWER TO CHINA

Exports to the **UK** had the largest increase in value in the first half of the year compared to 2024 and reached EUR 27.6 billion. This is an increase of EUR 1.2 billion (+5%), explained in part by higher prices of cocoa products and chocolate.

Exports to the **US** followed with an increase of EUR 742 million (+5%) in the first semester of 2025 compared to 2024. This increase was concentrated on the first three months of the year, but exports came back to a level similar to 2024 since April. The increase was partly explained by a rise in the value of cocoa-based products, as well as spirits, dairy and wine exports.

Exports to **Switzerland** grew by EUR 638 million (+10%), in part due to the high prices of cocoa products.

By contrast, exports to **China** decreased by EUR 670 million (-10%) in the first half of the year compared to 2024. This is explained by a strong reduction in cereal exports, mainly due to lower demand. Exports to **Thailand** also declined by

EUR 242 million, in part due to lower cereals exports.

HIGH PRICES FOR COCOA BASED EXPORTS, LOWER EXPORTS OF CEREALS

Exports in the **coffee, tea, cocoa and spices** category had the largest increase in value, rising by EUR 1.8 billion (+38%) between January and June compared to 2024. This was mainly driven by a nearly twofold price increase for exports of cocoa paste, butter and powder, as well as a 30% increase in coffee export prices.

Exports of **confectionery and chocolate** also increased by EUR 1 billion (+20%), mainly due to the high prices of chocolate exports (+31%).

Exports of **dairy products** increased by EUR 635 million (+7%), primarily due to higher prices, while volumes declined by 2%.

By contrast, EU **cereals** exports decreased by EUR 1.5 billion (-22%) in January-June 2025 compared to 2024. This is mainly explained by lower export volumes (-27%, -6.7 million t, mainly in wheat), while prices increased by 6%.

Exports of **olives and olive oil** increased by 18% in volume, but this was offset by a 27% reduction in prices compared to the 2024 peak. This led to an overall decrease in value of EUR 572 million (-15%), however, they remain above 2023 levels.

Exports of **non-edible products for technical use** also declined by EUR 313 million (-12%), mainly due to lower export prices, in particular for plant fibres.



EU AGRI-FOOD IMPORTS

The value of EU agri-food imports reached **EUR 15.3 billion in June 2025**. This is **10% lower than the previous month, but still 15% higher than in June 2024**. Over the first half of 2025, cumulative EU imports reached **EUR 96.8 billion**. This is an increase of **EUR 13.5 billion (+16%) compared to 2024**, mainly explained by high prices for several EU imports, particularly **cocoa and coffee**.

IMPORTS FROM CÔTE D'IVOIRE AND CANADA INCREASED THE MOST

Imports from **Côte d'Ivoire** had the largest increase in value in the first half of 2025 compared to 2024 (+ EUR 2 billion, +66%), mainly due to a large increase in cocoa prices.

Imports from **Canada** followed as they doubled in value, with an increase of EUR 1.2 billion (+101%), mainly due to large increases in rapeseed, maize and wheat imports.

Imports from the **US** also increased by EUR 1.1 million (+19%) compared to 2024, mainly due to higher maize imports and higher prices for nuts imports, while the value of soya imports declined.

Imports from **China** increased by EUR 946 million (+22%), due to increases across most product categories, notably non-edible products (including fatty acids and waxes). Imports from **Brazil** increased by EUR 838 million (+10%), mainly due to higher coffee prices, while the price of oilseeds

and protein crops declined.

By contrast, imports from **Ukraine** decreased by EUR 891 million (-13%), mainly due to lower imports of cereals and rapeseed. Imports from **Russia** decreased by 73% (- EUR 566 million), mainly due to a fall in imports of oilseeds, margarine and other oils and fats, and cereals.

COFFEE AND COCOA PRICES DRIVE THE INCREASE IN EU IMPORTS

Imports of **coffee, tea, cocoa and spices** increased by EUR 8.1 billion (+60%) in the first half of 2025 compared to 2024. This is mainly explained by higher import prices: cocoa prices doubled and coffee prices rose by 62%.

Imports of **fruit and nuts** followed with an increase of EUR 2.3 billion (+18%), mainly due to higher prices (+12%).

Among other increases, imports of **non-edible products** increased by EUR 492 million (+10%), mainly due to higher prices. Imports of **confectionery and chocolate** increased by EUR 433 million (+36%, mainly due to higher prices). Imports of **poultry and eggs** increased by EUR 356 million (+30%, due to both higher prices and volumes).

By contrast, imports of **olives and olive oil** decreased by EUR 466 million (-44%), due to both lower import prices and volumes.

Imports of **sugar and isoglucose** decreased by EUR 332 million (-32%), mainly due to reduced volumes (-25%).

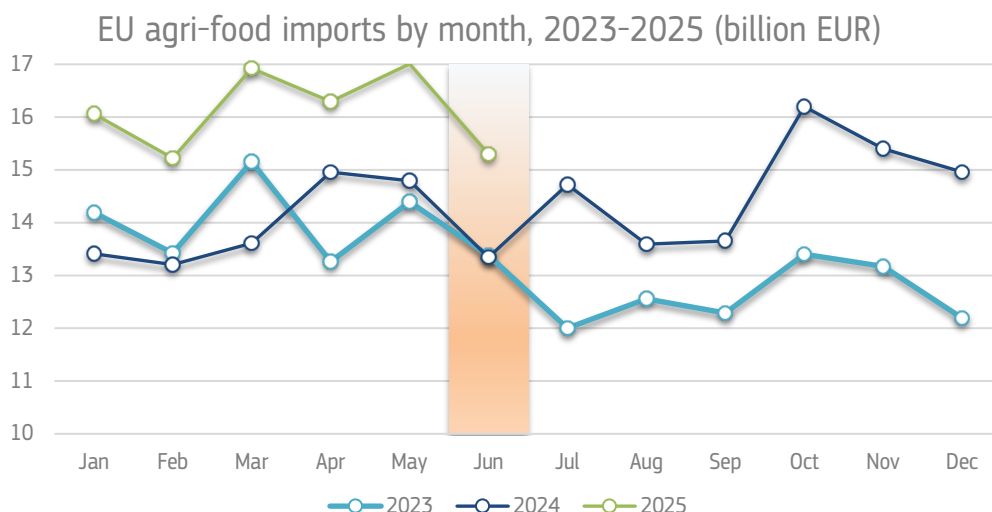


TABLE 1

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

	yearly data			monthly data			
TRADING PARTNERS	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan.-Jun. 2024	Jan.-Jun. 2025	Difference	
TOTAL AGRIFOOD	228 790	235 036	100%	116 095	118 700	2 605	2%
United Kingdom	51 745	53 922	23%	26 374	27 597	1 223	5%
United States	27 192	30 398	13%	14 433	15 175	742	5%
Switzerland	11 597	12 265	5%	6 138	6 776	638	10%
Türkiye	4 871	5 165	2%	2 699	3 089	391	14%
Norway	5 943	6 035	3%	3 013	3 322	308	10%
Singapore	2 369	2 033	1%	1 067	882	- 185	-17%
Russian Federation	6 763	6 025	3%	2 999	2 809	- 190	-6%
Japan	7 876	8 174	3%	4 243	4 044	- 198	-5%
Thailand	1 459	1 518	1%	844	602	- 242	-29%
China	14 603	13 239	6%	6 965	6 295	- 670	-10%
Other countries	94 373	96 260	41%	47 320	48 108	788	2%

TABLE 2

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

	yearly data			monthly data			
TRADING PARTNERS	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan.-Jun. 2024	Jan.-Jun. 2025	Difference	
TOTAL AGRIFOOD	228 790	235 036	100%	116 095	118 700	2 605	2%
United Kingdom	51 745	53 922	23%	26 374	27 597	1 223	5%
United States	27 192	30 398	13%	14 433	15 175	742	5%
Switzerland	11 597	12 265	5%	6 138	6 776	638	10%
China	14 603	13 239	6%	6 965	6 295	- 670	-10%
Japan	7 876	8 174	3%	4 243	4 044	- 198	-5%
Norway	5 943	6 035	3%	3 013	3 322	308	10%
Türkiye	4 871	5 165	2%	2 699	3 089	391	14%
Russian Federation	6 763	6 025	3%	2 999	2 809	- 190	-6%
Canada	4 469	4 808	2%	2 200	2 352	151	7%
Saudi Arabia	4 646	4 644	2%	2 342	2 199	- 143	-6%
Korea, Republic of	4 542	4 270	2%	2 242	2 158	- 84	-4%
Ukraine	3 461	3 633	2%	1 770	2 074	304	17%
Australia	3 769	4 168	2%	2 006	1 956	- 49	-2%
Morocco	3 831	3 589	2%	1 929	1 921	- 8	0%
Israel	2 773	2 903	1%	1 424	1 671	247	17%
Other countries	70 710	71 795	31%	35 318	35 260	- 58	0%

TABLE 3

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

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan.-Jun. 2024	Jan.-Jun. 2025	Difference	
TOTAL AGRIFOOD	228 790	235 036	100%	116 095	118 700	2 605	2%
Coffee, tea, cocoa and spices	8 137	10 730	5%	4 880	6 720	1 840	38%
Confectionery and chocolate	10 764	11 802	5%	5 067	6 076	1 009	20%
Dairy products	19 580	19 618	8%	9 611	10 246	635	7%
Tobacco, cigars and cigarettes	7 026	7 770	3%	3 912	4 313	401	10%
Cereal preparations and milling products	24 305	24 744	11%	11 995	12 390	395	3%
Vegetable oils (oilseeds and palm)	3 534	2 605	1%	1 318	1 189	- 129	-10%
Preparations of fruit, nuts and vegetables	12 379	12 894	5%	6 513	6 244	- 269	-4%
Non-edible for technical use	4 447	4 586	2%	2 538	2 226	- 313	-12%
Olives and olive oil	5 111	7 199	3%	3 814	3 242	- 572	-15%
Cereals	14 611	11 721	5%	6 602	5 133	-1 468	-22%
Other products	118 896	121 366	52%	59 846	60 921	1 075	2%

TABLE 4

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

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan.-Jun. 2024	Jan.-Jun. 2025	Difference	
TOTAL AGRIFOOD	228 790	235 036	100%	116 095	118 700	2 605	2%
Cereal preparations and milling products	24 305	24 744	11%	11 995	12 390	395	3%
Dairy products	19 580	19 618	8%	9 611	10 246	635	7%
Wine and wine based products	17 606	17 391	7%	8 192	8 119	- 73	-1%
Mixed food preparations and ingredients	14 427	15 633	7%	7 635	7 932	297	4%
Coffee, tea, cocoa and spices	8 137	10 730	5%	4 880	6 720	1 840	38%
Preparations of fruit, nuts and vegetables	12 379	12 894	5%	6 513	6 244	- 269	-4%
Confectionery and chocolate	10 764	11 802	5%	5 067	6 076	1 009	20%
Pigmeat	12 269	12 367	5%	6 125	6 056	- 69	-1%
Beer, cider and other beverages	10 781	10 828	5%	5 439	5 325	- 114	-2%
Cereals	14 611	11 721	5%	6 602	5 133	- 1 468	-22%
Vegetables	8 802	9 280	4%	4 607	4 832	224	5%
Pet food and forage crops	8 305	8 461	4%	4 212	4 437	225	5%
Tobacco, cigars and cigarettes	7 026	7 770	3%	3 912	4 313	401	10%
Other animal products	8 320	8 268	4%	4 209	4 107	- 103	-2%
Spirits and liqueurs	9 069	8 706	4%	4 041	4 001	- 40	-1%
Other products	42 409	44 821	19%	23 055	22 770	- 286	-1%

TABLE 5

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

	yearly data			monthly data			
TRADING PARTNERS	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan.-Jun. 2024	Jan.-Jun. 2025	Difference	
TOTAL AGRIFOOD	159 424	171 851	100%	83 325	96 810	13 486	16%
Côte d'Ivoire	4 055	6 760	4%	3 045	5 053	2 008	66%
Canada	2 845	2 540	1%	1 176	2 363	1 187	101%
United States	11 683	11 935	7%	5 829	6 927	1 098	19%
China	8 347	9 154	5%	4 297	5 244	946	22%
Brazil	17 215	17 424	10%	8 300	9 138	838	10%
Moldova, Republic of	891	989	1%	452	332	- 119	-26%
Tunisia	886	1 292	1%	809	578	- 231	-29%
Indonesia	5 474	5 245	3%	2 564	2 318	- 246	-10%
Russian Federation	1 892	1 027	1%	773	207	- 566	-73%
Ukraine	11 839	13 094	8%	6 623	5 732	- 891	-13%
Other countries	94 297	102 391	60%	49 458	58 919	9 461	19%

TABLE 6

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

	yearly data			monthly data			
TRADING PARTNERS	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan.-Jun. 2024	Jan.-Jun. 2025	Difference	
TOTAL AGRIFOOD	159 424	171 851	100%	83 325	96 810	13 486	16%
Brazil	17 215	17 424	10%	8 300	9 138	838	10%
United Kingdom	15 511	15 378	9%	7 360	7 801	440	6%
United States	11 683	11 935	7%	5 829	6 927	1 098	19%
Ukraine	11 839	13 094	8%	6 623	5 732	- 891	-13%
China	8 347	9 154	5%	4 297	5 244	946	22%
Côte d'Ivoire	4 055	6 760	4%	3 045	5 053	2 008	66%
Türkiye	6 627	7 314	4%	3 515	3 678	162	5%
Viet Nam	3 216	3 836	2%	2 030	2 809	780	38%
Argentina	4 663	5 559	3%	2 237	2 568	331	15%
Switzerland	4 859	5 048	3%	2 378	2 509	130	5%
Morocco	3 182	3 447	2%	2 090	2 430	340	16%
Canada	2 845	2 540	1%	1 176	2 363	1 187	101%
India	3 302	3 975	2%	1 894	2 331	437	23%
Indonesia	5 474	5 245	3%	2 564	2 318	- 246	-10%
Peru	3 089	3 768	2%	1 483	1 922	439	30%
Other countries	53 518	57 374	33%	28 504	33 990	5 487	19%

TABLE 7

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan.-Jun. 2024	Jan.-Jun. 2025	Difference	
TOTAL AGRIFOOD	159 424	171 851	100%	83 325	96 810	13 486	16%
Coffee, tea, cocoa and spices	20 564	30 326	18%	13 461	21 530	8 069	60%
Fruit and nuts	22 336	24 938	15%	12 307	14 579	2 272	18%
Non-edible for technical use	9 393	9 628	6%	4 710	5 202	492	10%
Confectionery and chocolate	2 390	2 900	2%	1 217	1 650	433	36%
Poultry and eggs	2 293	2 415	1%	1 188	1 545	356	30%
Pigmeat	407	361	0%	189	174	- 16	-8%
Cereals	11 691	9 734	6%	4 845	4 821	- 24	0%
Vegetable oils (oilseeds and palm)	7 708	7 586	4%	3 821	3 730	- 90	-2%
Sugar and isoglucose	2 797	1 742	1%	1 025	693	- 332	-32%
Olives and olive oil	1 226	1 755	1%	1 070	604	- 466	-44%
Other products	78 620	80 465	47%	39 492	42 283	2 791	7%

TABLE 8

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan.-Jun. 2024	Jan.-Jun. 2025	Difference	
TOTAL AGRIFOOD	159 424	171 851	100%	83 325	96 810	13 486	16%
Coffee, tea, cocoa and spices	20 564	30 326	18%	13 461	21 530	8 069	60%
Fruit and nuts	22 336	24 938	15%	12 307	14 579	2 272	18%
Oilseeds and protein crops	21 142	20 040	12%	9 724	9 891	167	2%
Non-edible for technical use	9 393	9 628	6%	4 710	5 202	492	10%
Cereals	11 691	9 734	6%	4 845	4 821	- 24	0%
Preparations of fruit, nuts and vegetables	6 730	7 588	4%	3 597	3 801	205	6%
Vegetable oils (oilseeds and palm)	7 708	7 586	4%	3 821	3 730	- 90	-2%
Vegetables	5 860	6 171	4%	3 523	3 658	134	4%
Mixed food preparations and ingredients	5 958	6 539	4%	3 241	3 370	129	4%
Tobacco, cigars and cigarettes	4 734	5 096	3%	2 507	2 848	341	14%
Other animal products	5 416	5 077	3%	2 542	2 769	227	9%
Cereal preparations and milling products	4 806	5 209	3%	2 514	2 716	202	8%
Margarine and other oils and fats (vegetable)	3 908	4 170	2%	1 983	2 282	299	15%
Spirits and liqueurs	4 516	4 383	3%	1 954	2 051	97	5%
Pet food and forage crops	3 146	3 403	2%	1 686	1 684	- 2	0%
Other products	21 517	21 963	13%	10 911	11 878	967	9%

TABLE 9

EU AGRI-FOOD TRADE BALANCE (million EUR)

	EXPORTS	IMPORTS	TRADE BALANCE		
AGRI-FOOD CATEGORIES/PERIOD	Jan.-Jun. 2025		Jan.-Jun. 2024	Jan.-Jun. 2025	Difference
	million EUR				
Total Agrifood	118 700	96 810	32 770	21 889	-10 881
Cereal preparations and milling products	12 390	2 716	9 481	9 674	193
Dairy products	10 246	1 378	8 524	8 868	344
Wine and wine based products	8 119	719	7 458	7 400	- 58
Pigmeat	6 056	174	5 936	5 883	- 53
Mixed food preparations and ingredients	7 932	3 370	4 394	4 562	168
Confectionery and chocolate	6 076	1 650	3 850	4 426	576
Beer, cider and other beverages	5 325	1 245	4 210	4 080	- 130
Pet food and forage crops	4 437	1 684	2 526	2 753	227
Olives and olive oil	3 242	604	2 744	2 638	- 106
Preparations of fruit, nuts and vegetables	6 244	3 801	2 917	2 443	- 473
Spirits and liqueurs	4 001	2 051	2 087	1 949	- 137
Poultry and eggs	3 168	1 545	1 807	1 624	- 183
Horticulture	2 576	1 238	1 321	1 339	17
Tobacco, cigars and cigarettes	4 313	2 848	1 405	1 465	61
Other animal products	4 107	2 769	1 667	1 337	- 330
Vegetables	4 832	3 658	1 084	1 174	90
Beef and veal	2 505	1 442	1 215	1 063	- 151
Sugar and isoglucose	1 055	693	151	362	212
Cereals	5 133	4 821	1 757	312	-1 444
Unspecified	532	312	446	220	- 226
Sheep and goat	479	880	- 260	- 400	- 141
Margarine and other oils and fats (vegetable)	1 216	2 282	- 904	-1 066	- 162
Vegetable oils (oilseeds and palm)	1 189	3 730	-2 503	-2 541	- 39
Non-edible for technical use	2 226	5 202	-2 172	-2 976	- 804
Oilseeds and protein crops	1 146	9 891	-8 633	-8 745	- 112
Fruit and nuts	3 434	14 579	-9 155	-11 145	-1 989
Coffee, tea, cocoa and spices	6 720	21 530	-8 581	-14 810	-6 229
<i>For info: fish and fish products</i>	<i>3 975</i>	<i>15 387</i>	<i>-10 613</i>	<i>-11 412</i>	<i>- 799</i>
<i>Total agrifood and fish</i>	<i>122 675</i>	<i>112 198</i>	<i>22 157</i>	<i>10 478</i>	<i>-11 680</i>

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