



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS until May 2026

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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/agri-cultural-trade/trade-and-international-policy-analysis_en#reference-files).

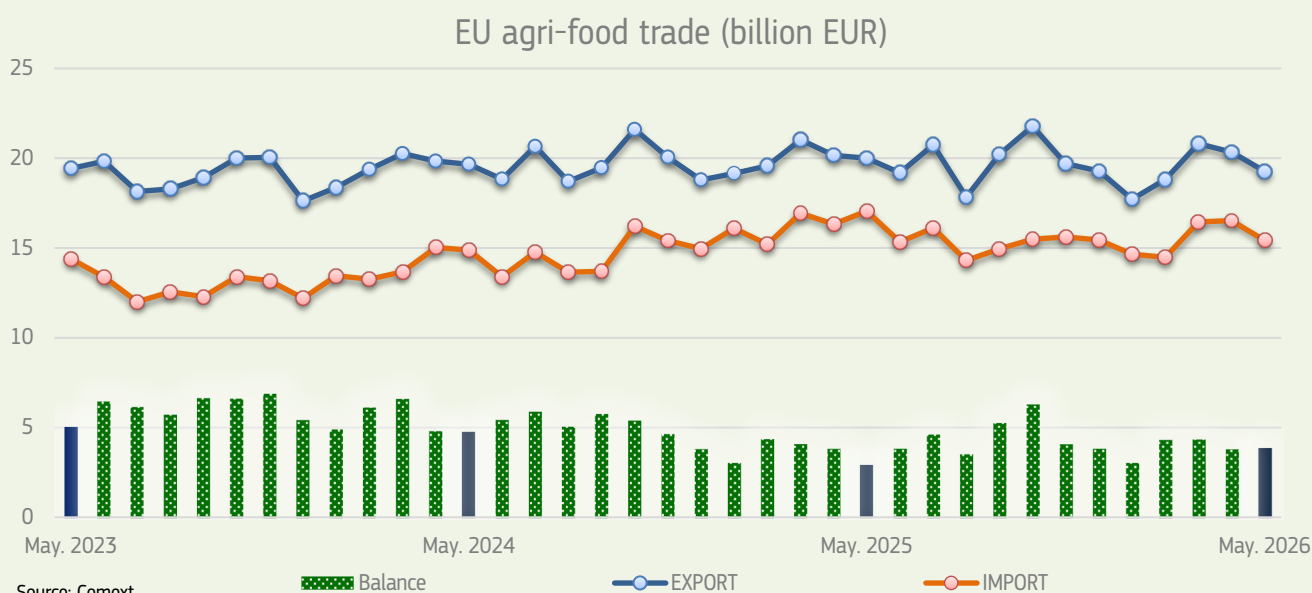
To access more data and figures behind this report, visit the dedicated trade app on the Agri-food Data Portal: [Overview of EU agri-food trade](#).

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

In May 2026, the EU exported EUR 19.3 billion agri-food products, 5% less than in the previous month and 4% below May 2025. Cumulative exports in 2026 declined by 3% 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), and 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 15.4 billion in May, down 7% from the previous month and 10% below last year. Cumulative 2026 imports declined by 5% year-on-year, driven by lower prices of cocoa products. Imports also contracted for cereals (lower wheat volumes and lower prices for maize and 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 slightly month-on-month in May (+1%), to EUR 3.9 billion, and was 31% above the comparatively low figure of May 2025. The cumulative surplus until May widened to EUR 19.4 billion, EUR 1 billion more than a year before, supported by falling cocoa prices.



EU AGRI-FOOD EXPORTS

In May 2026, the EU exported EUR 19.3 billion in agri-food products, down 5% month-on-month and 4% year-on-year. Since January, cumulative exports reached EUR 96.9 billion, 3% below last year (- EUR 3.0 billion), mostly due to reduced exports of cocoa, pigmeat and olive oil.

LOWER EXPORTS TO THE US, DUE TO HIGH LEVELS IN FIRST QUARTER 2025 AND LOWER PRICES

The main export reduction in January-May 2026 was to the **US** (-13%, - EUR 1.6 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 782 million) with decreases in pigmeat (-14%), cocoa products (-45%, due to falling prices), cereals (-30%, due to lower volumes) and dairy (-6%, due to reduced prices). By contrast, export volumes of rape oil almost tripled.

Exports to **Japan** also decreased (-13%, - EUR 460 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** (-28%, - EUR 371 million), as well as to other Gulf

countries with smaller flows. Exports to **Kuwait**, **Qatar** and **Bahrain** jointly contracted by 29% (- EUR 186 million).

By contrast, exports to **Egypt** rose significantly in the first five months of 2026 (+36%, + EUR 289 million), mostly due to increased wheat exports. Exports to **Ukraine** also grew by EUR 187 million (+11%), with the largest increase in spirits.

FALLING PIGMEAT EXPORTS TO CHINA AND JAPAN

Exports in the category **coffee, tea, cocoa and spices** saw the largest decrease in value, down EUR 981 million (-17%) in January-May 2026. This was mainly driven by reduced volumes (-17%) and prices (-25%) of cocoa paste, butter and powder.

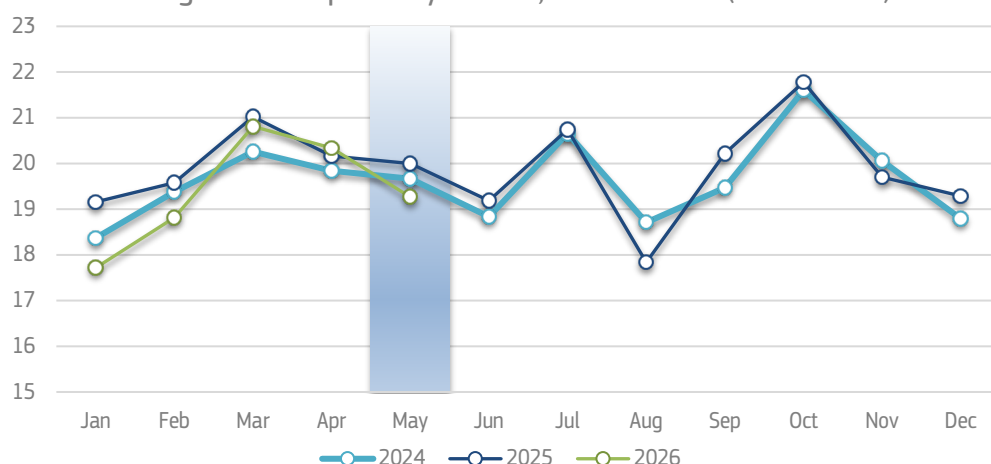
Exports of **pigmeat** also decreased by EUR 688 million (-13%) mostly due to lower prices and falling volumes to China, Japan, Philippines and Malaysia.

Exports of **olives and olive oil** fell by EUR 424 million (-15%), due to lower olive oil prices (-8%) and volumes (-8%), in particular to the US, but also to Canada, Australia and Japan.

Exports of **wine and wine-based products** also decreased by EUR 359 million (-5%), mostly due to lower prices to the US.

The main increase in exports was in **fruit and nuts** (+ EUR 223 million, +8%), mostly in apples, but also in kiwis and raspberries.

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



EU AGRI-FOOD IMPORTS

The EU imported EUR 15.4 billion in agri-food products in May 2026, down 7% month-on-month and 10% year-on-year. Cumulative imports since January were EUR 77.5 billion, 5% below the year before (- EUR 4.1 billion), mostly due to reduced imports of cocoa products, cereals and oilseeds.

LOWER SOYA BEAN IMPORTS FROM US

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

Côte d'Ivoire (-18%, - EUR 788 million),
Nigeria (-48%, - EUR 507 million),
Cameroon (-42%, - EUR 450 million) and
Guinea (-95%, - EUR 224 million).

Imports from the **US** also declined by 7% (- EUR 433 million), primarily due to lower import volumes of soya beans (-47%, - EUR 439 million), and tobacco (-51%, - EUR 100 million). By contrast, imports of nuts, mostly hazelnuts and pistachios, grew by 10% (+ EUR 163 million).

Imports from the **UK** decreased by 6% (- EUR 400 million), with reductions across most product categories, particularly dairy, cocoa products and cereals.

By contrast, imports from **Argentina** increased year-on-year by 10% (+ EUR 220 million) due to higher imports of sunflower seeds. Imports from **Viet Nam** grew by 9% (+ EUR 213 million), mainly due to larger coffee volumes.

REDUCED COFFEE IMPORTS

Imports in the category **coffee, tea, cocoa and spices** declined the most in January-May 2026, down EUR 2.9 billion (-16%). This is mostly due to the decreasing prices of cocoa products (-24%), that reduced import value by EUR 2.6 billion, while volumes fell by 6%. Coffee imports also decreased (-2%, - EUR 155 million) mostly due to reduced volumes from Brazil (-13%, - EUR 359 million) and Colombia (-22%, - EUR 101 million).

Imports of **cereals** followed with a decrease of EUR 801 million (-19%), mostly due to lower volumes of wheat (- EUR 459 million, -40%), but imports of maize (-7%) and rice (-21%) also contracted, mostly due to lower prices.

Imports of **oilseeds and protein crops** decreased by EUR 536 million (-6%). The reduction is primarily in soya cake from Brazil and Argentina, and soya beans from the US. By contrast, imports of sunflower seeds almost doubled following two poor crop years in the EU.

Imports grew the most in the category **fruit and nuts** (+ EUR 465 million, +4%), with increases spread across different products.

Imports of **beef and veal** also increased by EUR 330 million (+28%), with increases from all main trade partners, supported by the short supply and high prices of EU beef and veal.

Imports of **margarine and other oils and fats** grew by EUR 176 million (+9%) due to increases in different types of oil, particularly palm kernel oil and coconut oil.

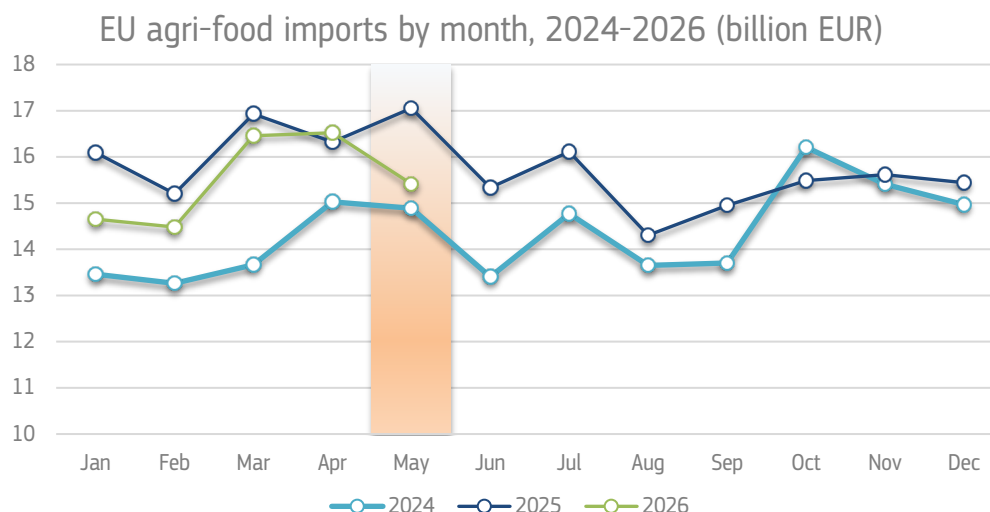


TABLE 1

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

	yearly data			monthly data			
TRADING PARTNERS	2024	2025	Share 2025	Jan25-May25	Jan26-May26	Difference	
TOTAL AGRI-FOOD	235 632	238 667	100%	99 917	96 944	- 2 973	-3%
Egypt	2 034	2 168	1%	808	1 097	289	36%
Ukraine	3 629	4 272	2%	1 735	1 922	187	11%
India	1 335	1 323	1%	585	700	115	20%
South Africa	1 857	1 909	1%	718	822	104	14%
Thailand	1 526	1 244	1%	491	587	96	20%
China	13 232	12 605	5%	5 253	4 976	- 277	-5%
United Arab Emirates	3 371	3 475	1%	1 322	950	- 371	-28%
Japan	8 165	7 656	3%	3 422	2 962	- 460	-13%
United Kingdom	53 975	55 656	23%	23 143	22 361	- 782	-3%
United States	30 404	28 590	12%	12 716	11 109	-1 608	-13%
Other countries	116 104	119 768	50%	49 725	49 459	- 265	-1%

TABLE 2

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

	yearly data			monthly data			
TRADING PARTNERS	2024	2025	Share 2025	Jan25-May25	Jan26-May26	Difference	
TOTAL AGRI-FOOD	235 632	238 667	100%	99 917	96 944	- 2 973	-3%
United Kingdom	53 975	55 656	23%	23 143	22 361	- 782	-3%
United States	30 404	28 590	12%	12 716	11 109	- 1 608	-13%
Switzerland	12 261	13 179	6%	5 742	5 742	0	0%
China	13 232	12 605	5%	5 253	4 976	- 277	-5%
Japan	8 165	7 656	3%	3 422	2 962	- 460	-13%
Norway	6 032	6 521	3%	2 823	2 891	69	2%
Türkiye	5 182	6 029	3%	2 703	2 728	25	1%
Russian Federation	6 156	5 888	2%	2 435	2 285	- 151	-6%
Canada	4 803	5 071	2%	1 956	1 962	7	0%
Ukraine	3 629	4 272	2%	1 735	1 922	187	11%
Korea, Republic of	4 262	4 333	2%	1 818	1 824	7	0%
Saudi Arabia	4 642	4 802	2%	1 854	1 810	- 44	-2%
Australia	4 165	4 056	2%	1 603	1 572	- 31	-2%
Morocco	3 634	3 787	2%	1 663	1 484	- 180	-11%
Israel	2 993	3 350	1%	1 444	1 453	9	1%
Other countries	72 096	72 872	31%	29 606	29 864	258	1%

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-May25	Jan26-May26	Difference	
TOTAL AGRI-FOOD	235 632	238 667	100%	99 917	96 944	- 2 973	-3%
Fruit and nuts	6 486	7 100	3%	2 961	3 184	223	8%
Other animal products	8 259	8 222	3%	3 403	3 598	195	6%
Non-edible for technical use	4 586	4 380	2%	1 898	2 089	191	10%
Vegetable oils (oilseeds and palm)	2 583	2 304	1%	1 000	1 188	189	19%
Spirits and liqueurs	8 769	8 314	3%	3 323	3 505	182	5%
Tobacco, cigars and cigarettes	7 778	8 324	3%	3 629	3 286	- 343	-9%
Wine and wine based products	17 456	16 483	7%	6 738	6 379	- 359	-5%
Olives and olive oil	7 206	6 025	3%	2 740	2 316	- 424	-15%
Pigmeat	12 376	11 999	5%	5 238	4 550	- 688	-13%
Coffee, tea, cocoa and spices	10 732	13 284	6%	5 630	4 648	- 981	-17%
Other products	149 403	152 232	64%	63 359	62 202	-1 157	-2%

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-May25	Jan26-May26	Difference	
TOTAL AGRI-FOOD	235 632	238 667	100%	99 917	96 944	- 2 973	-3%
Cereal preparations and milling products	24 741	25 388	11%	10 272	10 031	- 241	-2%
Dairy products	19 633	20 722	9%	8 492	8 367	- 125	-1%
Mixed food preparations and ingredients	15 665	16 031	7%	6 657	6 573	- 84	-1%
Wine and wine based products	17 456	16 483	7%	6 738	6 379	- 359	-5%
Preparations of fruit, nuts and vegetables	12 924	12 335	5%	5 245	4 923	- 323	-6%
Confectionery and chocolate	11 908	13 245	6%	5 020	4 750	- 269	-5%
Coffee, tea, cocoa and spices	10 732	13 284	6%	5 630	4 648	- 981	-17%
Pigmeat	12 376	11 999	5%	5 238	4 550	- 688	-13%
Cereals	11 720	10 741	5%	4 413	4 382	- 31	-1%
Beer, cider and other beverages	10 837	10 506	4%	4 377	4 236	- 140	-3%
Vegetables	9 334	9 325	4%	4 243	4 096	- 146	-3%
Pet food and forage crops	8 461	8 969	4%	3 718	3 879	161	4%
Other animal products	8 259	8 222	3%	3 403	3 598	195	6%
Spirits and liqueurs	8 769	8 314	3%	3 323	3 505	182	5%
Tobacco, cigars and cigarettes	7 778	8 324	3%	3 629	3 286	- 343	-9%
Other products	45 041	44 778	19%	19 521	19 742	221	1%

TABLE 5

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

TRADING PARTNERS	yearly data			monthly data			
	2024	2025	Share 2025	Jan25-May25	Jan26-May26	Difference	
TOTAL AGRI-FOOD	172 416	188 855	100%	81 609	77 529	- 4 080	-5%
Argentina	5 570	5 610	3%	2 124	2 344	220	10%
Viet Nam	3 838	5 334	3%	2 273	2 486	213	9%
Guatemala	1 098	1 188	1%	423	564	141	33%
New Zealand	1 879	2 340	1%	794	932	138	17%
Egypt	2 327	2 418	1%	1 178	1 308	130	11%
United Kingdom	15 390	16 004	8%	6 462	6 062	- 400	-6%
United States	11 963	13 222	7%	5 946	5 514	- 433	-7%
Cameroon	1 560	2 284	1%	1 069	619	- 450	-42%
Nigeria	1 685	2 135	1%	1 061	554	- 507	-48%
Côte d'Ivoire	6 759	8 872	5%	4 356	3 568	- 788	-18%
Other countries	120 347	129 448	69%	55 923	53 579	-2 344	-4%

TABLE 6

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

TRADING PARTNERS	yearly data			monthly data			
	2024	2025	Share 2025	Jan25-May25	Jan26-May26	Difference	
TOTAL AGRI-FOOD	172 416	188 855	100%	81 609	77 529	- 4 080	-5%
Brazil	17 468	18 596	10%	7 537	7 645	108	1%
United Kingdom	15 390	16 004	8%	6 462	6 062	- 400	-6%
United States	11 963	13 222	7%	5 946	5 514	- 433	-7%
Ukraine	13 194	10 626	6%	4 979	4 734	- 245	-5%
China	9 175	9 937	5%	4 420	4 250	- 170	-4%
Côte d'Ivoire	6 759	8 872	5%	4 356	3 568	- 788	-18%
Türkiye	7 314	6 977	4%	3 171	2 963	- 208	-7%
Viet Nam	3 838	5 334	3%	2 273	2 486	213	9%
Argentina	5 570	5 610	3%	2 124	2 344	220	10%
Morocco	3 460	3 753	2%	2 203	2 188	- 14	-1%
Switzerland	5 046	5 262	3%	2 103	2 038	- 65	-3%
Indonesia	5 426	5 207	3%	2 010	1 857	- 153	-8%
India	3 978	4 433	2%	1 994	1 672	- 322	-16%
Canada	2 549	4 351	2%	1 945	1 634	- 311	-16%
Peru	3 769	4 633	2%	1 591	1 597	6	0%
Other countries	57 518	66 037	35%	28 495	26 978	- 1 516	-5%

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-May25	Jan26-May26	Difference	
TOTAL AGRI-FOOD	172 416	188 855	100%	81 609	77 529	- 4 080	-5%
Fruit and nuts	24 953	28 731	15%	12 218	12 682	465	4%
Beef and veal	2 645	3 416	2%	1 192	1 522	330	28%
Margarine and other oils and fats (vegetable)	4 178	4 949	3%	1 887	2 063	176	9%
Poultry and eggs	2 412	2 952	2%	1 297	1 427	131	10%
Olives and olive oil	1 752	1 076	1%	536	655	119	22%
Confectionery and chocolate	2 903	3 436	2%	1 385	1 176	- 209	-15%
Dairy products	2 257	2 709	1%	1 153	937	- 216	-19%
Oilseeds and protein crops	20 129	18 550	10%	8 328	7 792	- 536	-6%
Cereals	9 796	8 669	5%	4 148	3 347	- 801	-19%
Coffee, tea, cocoa and spices	30 326	41 575	22%	18 068	15 204	-2 864	-16%
Other products	71 066	72 792	39%	31 398	30 723	- 676	-2%

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-May25	Jan26-May26	Difference	
TOTAL AGRI-FOOD	172 416	188 855	100%	81 609	77 529	- 4 080	-5%
Coffee, tea, cocoa and spices	30 326	41 575	22%	18 068	15 204	- 2 864	-16%
Fruit and nuts	24 953	28 731	15%	12 218	12 682	465	4%
Oilseeds and protein crops	20 129	18 550	10%	8 328	7 792	- 536	-6%
Non-edible for technical use	9 681	10 364	5%	4 492	4 472	- 20	0%
Cereals	9 796	8 669	5%	4 148	3 347	- 801	-19%
Preparations of fruit, nuts and vegetables	7 591	7 770	4%	3 195	3 162	- 33	-1%
Vegetables	6 173	6 243	3%	3 222	3 161	- 61	-2%
Vegetable oils (oilseeds and palm)	7 856	7 575	4%	3 166	3 028	- 138	-4%
Mixed food preparations and ingredients	6 544	6 723	4%	2 813	2 758	- 54	-2%
Tobacco, cigars and cigarettes	5 105	5 385	3%	2 449	2 310	- 139	-6%
Other animal products	5 080	5 558	3%	2 284	2 279	- 5	0%
Cereal preparations and milling products	5 242	5 343	3%	2 289	2 194	- 95	-4%
Margarine and other oils and fats (vegetable)	4 178	4 949	3%	1 887	2 063	176	9%
Spirits and liqueurs	4 380	4 317	2%	1 720	1 760	40	2%
Beef and veal	2 645	3 416	2%	1 192	1 522	330	28%
Other products	22 737	23 688	13%	10 138	9 794	- 344	-3%

TABLE 9

EU AGRI-FOOD TRADE BALANCE (million EUR)

	EXPORTS	IMPORTS	TRADE BALANCE		
AGRI-FOOD CATEGORIES/PERIOD	Jan26-May26		Jan25-May25	Jan26-May26	Difference
	million EUR				
Total Agrifood	96 944	77 529	18 309	19 416	1 107
Cereal preparations and milling products	10 031	2 194	7 982	7 836	- 146
Dairy products	8 367	937	7 339	7 429	91
Wine and wine based products	6 379	547	6 142	5 832	- 310
Pigmeat	4 550	148	5 095	4 402	- 692
Mixed food preparations and ingredients	6 573	2 758	3 844	3 815	- 29
Confectionery and chocolate	4 750	1 176	3 635	3 574	- 61
Beer, cider and other beverages	4 236	949	3 367	3 288	- 80
Pet food and forage crops	3 879	1 321	2 300	2 558	258
Preparations of fruit, nuts and vegetables	4 923	3 162	2 050	1 760	- 289
Spirits and liqueurs	3 505	1 760	1 603	1 745	142
Olives and olive oil	2 316	655	2 204	1 662	- 543
Other animal products	3 598	2 279	1 119	1 319	200
Horticulture	2 302	1 072	1 239	1 231	- 9
Poultry and eggs	2 640	1 427	1 334	1 213	- 121
Cereals	4 382	3 347	266	1 035	769
Tobacco, cigars and cigarettes	3 286	2 310	1 179	976	- 204
Vegetables	4 096	3 161	1 021	936	- 86
Beef and veal	2 241	1 522	972	718	- 254
Unspecified	414	181	192	233	41
Sugar and isoglucose	804	602	358	201	- 157
Sheep and goat	512	779	- 266	- 267	- 2
Margarine and other oils and fats (vegetable)	1 070	2 063	- 875	- 993	- 118
Vegetable oils (oilseeds and palm)	1 188	3 028	-2 166	-1 840	326
Non-edible for technical use	2 089	4 472	-2 594	-2 383	211
Oilseeds and protein crops	982	7 792	-7 337	-6 809	528
Fruit and nuts	3 184	12 682	-9 257	-9 499	- 242
Coffee, tea, cocoa and spices	4 648	15 204	-12 439	-10 556	1 883
<i>For info: fish and fish products</i>	<i>3 288</i>	<i>12 713</i>	<i>-9 553</i>	<i>-9 425</i>	<i>128</i>
<i>Total agrifood and fish</i>	<i>100 233</i>	<i>90 242</i>	<i>8 756</i>	<i>9 991</i>	<i>1 235</i>

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