

MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS until September 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/agricultural-trade/trade-and-international-policy-analysis_en#reference-files).

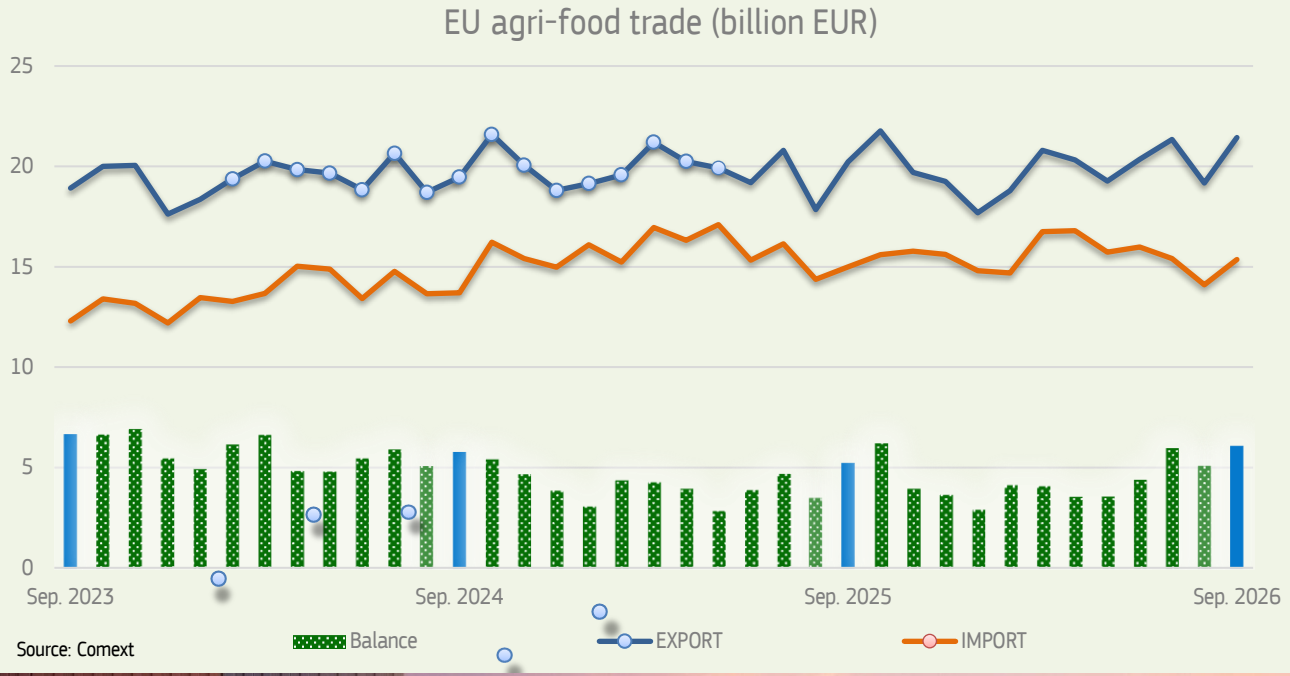
To access more data and figures behind this report, visit the dedicated trade app on the Agri-food Data Portal: Overview of EU agri-food trade.

HIGHLIGHTS: Cumulative EU agri-food exports until September grow, while imports decrease

In September 2026, the EU exported EUR 21.4 billion agri-food products, 12% more than in the previous month and 6% above September 2025. Cumulative exports in 2026 grew slightly year-on-year, by 1%. Exports contracted particularly for cocoa paste, butter and powder, as well as pigmeat. These decreases were compensated by increases across several product categories, including other animal products, spirits and liqueurs, vegetable oils, cereals and dairy products.

The EU imported agri-food products worth EUR 15.4 billion in September, up 9% from the previous month and 2% above last year. Cumulative 2026 imports declined by 2% year-on-year, driven by lower prices of cocoa products. Imports also contracted for cereals (particularly wheat and rice) and dairy products. The largest increases in imports were for fruit and nuts, and non-edible products.

The EU agri-food trade surplus increased by 20% month-on-month in September, following the dip in August, to EUR 6.1 billion, remaining 16% above September 2025. The cumulative surplus in the first nine months of 2026 widened to EUR 39.6 billion, EUR 4.0 billion more than a year before, supported by falling cocoa prices.



Source: Comext



EU AGRI-FOOD EXPORTS

In September 2026, the EU exported EUR 21.4 billion in agri-food products, up 12% month-on-month and 6% year-on-year. Since January, cumulative exports reached EUR 179.2 billion, 1% more than the year before (+ EUR 1.0 billion).

EXPORTS TO THE US RETURN TO AVERAGE LEVELS

The main export reduction in January-September 2026 was to the **US** (- 4%, - EUR 967 million). This follows high export levels in the first quarter of 2025 with potential frontloading ahead of the announced US tariffs. The most significant reductions were in olive oil (-16%), beer (-35%) and cocoa products (-31%); while exports of spirits and liqueurs grew by 13%. Nevertheless, exports to the US are higher than a year before since July, and cumulative volumes of wine, the main exported product, are at last year's level.

The second largest export reduction was to the **UK** (-2%, - EUR 911 million) with main decreases in cocoa products, pigmeat and cereals.

Exports to **Japan** also decreased (-10%, - EUR 589 million), driven by lower pigmeat volumes, following the African Swine Fever outbreak in Spain in November 2025, and lower prices of tobacco.

The closure of the Strait of Hormuz from March 2026 reduced exports to the **United Arab Emirates** (-18%, - EUR 442 million), as well as to other Gulf countries with smaller flows. However, from the dip of March, export figures have continuously grown to reach average levels in August 2026, underlining the flexibility of international trade flows.

By contrast, exports to **Türkiye** grew by EUR 398 million (+9%) mostly due to beef and veal shipments. Exports to **Saudi Arabia** also grew by EUR 355 million (+10%), with the largest increases in cereals.

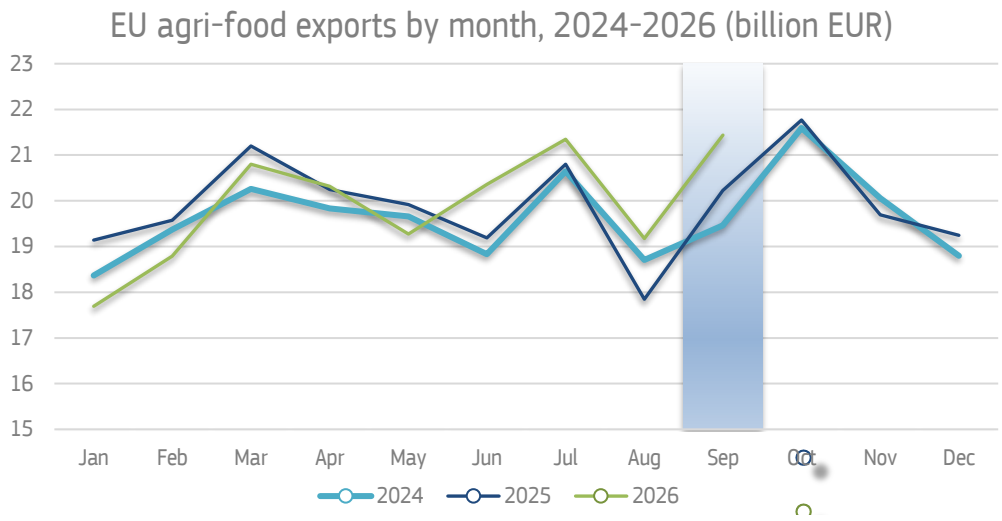
GROWING EXPORTS OF SPIRITS AND LIQUEURS

Exports in the category **coffee, tea, cocoa and spices** saw the largest decrease in value, down EUR 1.5 billion (-15%) in the first nine months of 2026. The main driver was the reduced volumes (-5%) and prices (-33%) of cocoa paste, butter and powder.

Exports of **pigmeat** also decreased by EUR 1.1 billion (-13%) mostly due to lower prices and falling volumes to China, Japan, the Philippines and the UK.

The main increase in exports was in the category **other animal products** (+ EUR 870 million, +14%), mostly due to higher prices of milk proteins and larger volumes of furskins.

Exports of **spirits and liqueurs** also grew (+ EUR 725 million, +12%), mostly to the US, but also to Ukraine and Russia. Exports of **vegetable oils** increased by 31% (+ EUR 540 million), particularly sunflower oil to India, and rape oil to Norway and the UK.



EU AGRI-FOOD IMPORTS

The EU imported EUR 15.4 billion in agri-food products in September 2026, up 9% month-on-month and 2% year-on-year. Cumulative imports since January were EUR 139.6 billion, 2% below the year before (- EUR 2.9 billion), mostly due to reduced cocoa prices.

COCOA PRICES STABILISE

The main driver of the reduced import value in 2026 is the decrease in cocoa prices, which have been consistently falling since the end of 2025, reaching a relatively stable level since June 2026. As a result, imports from the most important cocoa-producing countries decreased in the first nine months of 2026:

Côte d'Ivoire (-20%, - EUR 1.4 billion),
Nigeria (-47%, - EUR 818 million),
Cameroon (-43%, - EUR 759 million) and
Guinea (-94%, - EUR 291 million).

Imports from the **UK** also declined by 6% (- EUR 690 million), with reductions across most product categories, particularly fresh dairy products and cocoa products.

Imports from **Canada** decreased by 17% (- EUR 537 million), primarily due to lower import volumes of maize and wheat.

By contrast, imports from **Brazil** grew year-on-year by 6% (+ EUR 857 million) mostly due to increased soya beans volumes. Imports from **Argentina** grew by 9% (+ EUR 375 million) due to higher imports of sunflower seeds.

LOWER COCOA AND COFFEE IMPORTS

Imports in the category **coffee, tea, cocoa and spices** declined the most in January-September 2026, down EUR 6.0 billion (-19%). This is mostly due to the falling prices of cocoa products (-31%), that reduced import value by EUR 4.5 billion, while volumes fell by 2%. Coffee imports also decreased (-10%, - EUR 1.4 billion) with reductions from most of the EU main trade partners:

Brazil (-16%, - EUR 733 million),
Colombia (-24%, - EUR 214 million),
Uganda (-21%, - EUR 184 million),
Ethiopia (-23%, - EUR 132 million) and
Vietnam (-4%, - EUR 95 million).

Imports of **cereals** followed with a decrease of EUR 499 million (-7%), mostly due to reductions in wheat (- EUR 572 million, -32%, mostly in volumes) and rice (- EUR 212 million, -14%, in volumes and prices).

Imports of **dairy products** decreased by EUR 405 million (-19%), following the higher levels in 2025 favoured by high EU prices.

Imports grew the most in the category **fruit and nuts** (+ EUR 1.3 billion, +6%), with increases spread across different products, particularly avocados, berries and kiwis.

Imports also increased in the category **non-edible for technical use** (+ EUR 1.0 billion, +13%), mostly due to higher volumes of fatty acids and waxes; and in the category **margarine and other oils and fats** (+ EUR 405 million, +11%), particularly coconut oil from the Philippines.

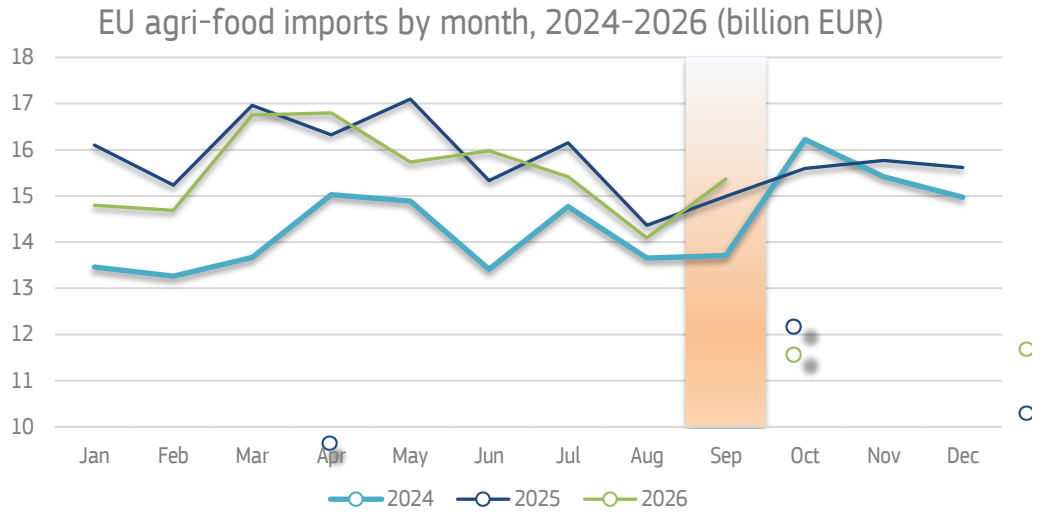


TABLE 1

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

TRADING PARTNERS	yearly data			monthly data			
	2024	2025	*Share 2025*	Jan25-Sep25	Jan26-Sep26	*Difference*	
TOTAL AGRI-FOOD	**235 587**	**238 844**	***100%***	**178 141**	**179 185**	***1 044***	***1%***
Türkiye	5 179	6 032	*3%*	4 413	4 811	398	*9%*
Saudi Arabia	4 642	4 803	*2%*	3 459	3 814	355	*10%*
Egypt	2 034	2 163	*1%*	1 469	1 824	355	*24%*
India	1 335	1 323	*1%*	988	1 325	337	*34%*
Norway	5 999	6 519	*3%*	4 929	5 236	307	*6%*
Morocco	3 634	3 784	*2%*	2 870	2 507	- 363	*-13%*
United Arab Emirates	3 371	3 474	*1%*	2 512	2 070	- 442	*-18%*
Japan	8 164	7 655	*3%*	5 967	5 377	- 589	*-10%*
United Kingdom	53 969	55 741	*23%*	41 695	40 784	- 911	*-2%*
United States	30 419	28 599	*12%*	21 801	20 834	- 967	*-4%*
Other countries	116 841	118 751	*50%*	88 038	90 602	2 564	*3%*

TABLE 2

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

TRADING PARTNERS	yearly data			monthly data			
	2024	2025	*Share 2025*	Jan25-Sep25	Jan26-Sep26	*Difference*	
TOTAL AGRI-FOOD	**235 587**	**238 844**	***100%***	**178 141**	**179 185**	***1 044***	***1%***
United Kingdom	53 969	55 741	*23%*	41 695	40 784	- 911	*-2%*
United States	30 419	28 599	*12%*	21 801	20 834	- 967	*-4%*
Switzerland	12 261	13 169	*6%*	9 870	10 044	174	*2%*
China	13 229	12 602	*5%*	9 508	9 446	- 62	*-1%*
Japan	8 164	7 655	*3%*	5 967	5 377	- 589	*-10%*
Norway	5 999	6 519	*3%*	4 929	5 236	307	*6%*
Türkiye	5 179	6 032	*3%*	4 413	4 811	398	*9%*
Russian Federation	6 165	5 879	*2%*	4 204	4 184	- 20	*0%*
Canada	4 801	5 070	*2%*	3 786	3 833	47	*1%*
Saudi Arabia	4 642	4 803	*2%*	3 459	3 814	355	*10%*
Ukraine	3 628	4 238	*2%*	3 121	3 289	167	*5%*
Korea, Republic of	4 261	4 335	*2%*	3 236	3 197	- 39	*-1%*
Australia	4 163	4 055	*2%*	3 063	2 987	- 76	*-2%*
Israel	2 992	3 355	*1%*	2 476	2 642	166	*7%*
Morocco	3 634	3 784	*2%*	2 870	2 507	- 363	*-13%*
Other countries	72 081	73 007	*31%*	53 743	56 200	2 457	*5%*

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-Sep25	Jan26-Sep26	*Difference*	
TOTAL AGRI-FOOD	**235 587**	**238 844**	***100%***	**178 141**	**179 185**	***1 044***	***1%***
Other animal products	8 274	8 254	*3%*	6 263	7 133	870	*14%*
Spirits and liqueurs	8 769	8 353	*3%*	6 220	6 946	725	*12%*
Vegetable oils (oilseeds and palm)	2 583	2 307	*1%*	1 728	2 268	540	*31%*
Cereals	11 719	10 743	*4%*	8 073	8 578	505	*6%*
Dairy products	19 635	20 715	*9%*	15 406	15 875	469	*3%*
Preparations of fruit, nuts and vegetables	12 934	12 406	*5%*	9 322	9 001	- 321	*-3%*
Confectionery and chocolate	11 892	13 201	*6%*	9 660	9 314	- 347	*-4%*
Olives and olive oil	7 206	6 024	*3%*	4 647	4 252	- 395	*-9%*
Pigmeat	12 371	12 009	*5%*	9 110	7 962	-1 148	*-13%*
Coffee, tea, cocoa and spices	10 722	13 303	*6%*	10 047	8 500	-1 547	*-15%*
Other products	129 482	131 528	*55%*	97 663	99 355	1 693	*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-Sep25	Jan26-Sep26	*Difference*	
TOTAL AGRI-FOOD	**235 587**	**238 844**	***100%***	**178 141**	**179 185**	***1 044***	***1%***
Cereal preparations and milling products	24 709	25 377	*11%*	18 849	18 861	12	*0%*
Dairy products	19 635	20 715	*9%*	15 406	15 875	469	*3%*
Wine and wine based products	17 456	16 492	*7%*	12 155	12 130	- 25	*0%*
Mixed food preparations and ingredients	15 672	16 078	*7%*	11 993	12 089	96	*1%*
Confectionery and chocolate	11 892	13 201	*6%*	9 660	9 314	- 347	*-4%*
Preparations of fruit, nuts and vegetables	12 934	12 406	*5%*	9 322	9 001	- 321	*-3%*
Cereals	11 719	10 743	*4%*	8 073	8 578	505	*6%*
Coffee, tea, cocoa and spices	10 722	13 303	*6%*	10 047	8 500	- 1 547	*-15%*
Beer, cider and other beverages	10 836	10 509	*4%*	8 079	8 169	91	*1%*
Pigmeat	12 371	12 009	*5%*	9 110	7 962	- 1 148	*-13%*
Pet food and forage crops	8 458	8 971	*4%*	6 699	7 166	467	*7%*
Other animal products	8 274	8 254	*3%*	6 263	7 133	870	*14%*
Spirits and liqueurs	8 769	8 353	*3%*	6 220	6 946	725	*12%*
Vegetables	9 330	9 331	*4%*	6 678	6 707	29	*0%*
Tobacco, cigars and cigarettes	7 778	8 233	*3%*	6 316	6 181	- 134	*-2%*
Other products	45 032	44 868	*19%*	33 271	34 572	1 301	*4%*

TABLE 5

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

	yearly data			monthly data			
TRADING PARTNERS	2024	2025	*Share 2025*	Jan25-Sep25	Jan26-Sep26	*Difference*	
TOTAL AGRI-FOOD	**172 464**	**189 539**	***100%***	**142 557**	**139 617**	***- 2 940***	***-2%***
Brazil	17 468	18 637	*10%*	13 879	14 736	857	*6%*
Argentina	5 570	5 624	*3%*	3 997	4 372	375	*9%*
United States	11 964	13 232	*7%*	9 891	10 257	366	*4%*
Guatemala	1 098	1 191	*1%*	867	1 107	241	*28%*
China	9 179	10 025	*5%*	7 617	7 849	233	*3%*
Canada	2 549	4 370	*2%*	3 154	2 617	- 537	*-17%*
United Kingdom	15 431	16 064	*8%*	11 927	11 237	- 690	*-6%*
Cameroon	1 560	2 303	*1%*	1 772	1 013	- 759	*-43%*
Nigeria	1 685	2 162	*1%*	1 736	918	- 818	*-47%*
Côte d'Ivoire	6 759	8 900	*5%*	7 050	5 627	-1 423	*-20%*
Other countries	99 199	107 031	*56%*	80 668	79 883	- 785	*-1%*

TABLE 6

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

	yearly data			monthly data			
TRADING PARTNERS	2024	2025	*Share 2025*	Jan25-Sep25	Jan26-Sep26	*Difference*	
TOTAL AGRI-FOOD	**172 464**	**189 539**	***100%***	**142 557**	**139 617**	***- 2 940***	***-2%***
Brazil	17 468	18 637	*10%*	13 879	14 736	857	*6%*
United Kingdom	15 431	16 064	*8%*	11 927	11 237	- 690	*-6%*
United States	11 964	13 232	*7%*	9 891	10 257	366	*4%*
Ukraine	13 194	10 633	*6%*	7 879	7 988	109	*1%*
China	9 179	10 025	*5%*	7 617	7 849	233	*3%*
Côte d'Ivoire	6 759	8 900	*5%*	7 050	5 627	- 1 423	*-20%*
Türkiye	7 314	6 994	*4%*	5 206	5 107	- 98	*-2%*
Argentina	5 570	5 624	*3%*	3 997	4 372	375	*9%*
Viet Nam	3 838	5 332	*3%*	4 217	4 226	8	*0%*
Switzerland	5 046	5 265	*3%*	3 816	3 781	- 35	*-1%*
Indonesia	5 426	5 295	*3%*	3 800	3 757	- 42	*-1%*
Peru	3 769	4 647	*2%*	3 127	3 260	133	*4%*
India	3 978	4 449	*2%*	3 426	3 015	- 411	*-12%*
Morocco	3 460	3 756	*2%*	2 863	2 910	47	*2%*
Canada	2 549	4 370	*2%*	3 154	2 617	- 537	*-17%*
Other countries	57 518	66 314	*35%*	50 710	48 876	- 1 833	*-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-Sep25	Jan26-Sep26	*Difference*	
TOTAL AGRI-FOOD	**172 464**	**189 539**	***100%***	**142 557**	**139 617**	***- 2 940***	***-2%***
Fruit and nuts	24 953	28 832	*15%*	21 920	23 265	1 345	*6%*
Non-edible for technical use	9 681	10 460	*6%*	7 846	8 871	1 024	*13%*
Margarine and other oils and fats (vegetable)	4 178	4 942	*3%*	3 526	3 931	405	*11%*
Poultry and eggs	2 412	2 953	*2%*	2 161	2 550	389	*18%*
Beef and veal	2 645	3 418	*2%*	2 378	2 753	375	*16%*
Beer, cider and other beverages	2 573	2 550	*1%*	1 967	1 893	- 74	*-4%*
Confectionery and chocolate	2 903	3 439	*2%*	2 550	2 245	- 304	*-12%*
Dairy products	2 298	2 747	*1%*	2 104	1 698	- 405	*-19%*
Cereals	9 796	8 704	*5%*	6 756	6 258	- 499	*-7%*
Coffee, tea, cocoa and spices	30 325	41 695	*22%*	31 686	25 733	-5 953	*-19%*
Other products	80 700	79 801	*42%*	59 662	60 421	758	*1%*

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-Sep25	Jan26-Sep26	*Difference*	
TOTAL AGRI-FOOD	**172 464**	**189 539**	***100%***	**142 557**	**139 617**	***- 2 940***	***-2%***
Coffee, tea, cocoa and spices	30 325	41 695	*22%*	31 686	25 733	- 5 953	*-19%*
Fruit and nuts	24 953	28 832	*15%*	21 920	23 265	1 345	*6%*
Oilseeds and protein crops	20 129	18 575	*10%*	13 904	13 935	31	*0%*
Non-edible for technical use	9 681	10 460	*6%*	7 846	8 871	1 024	*13%*
Cereals	9 796	8 704	*5%*	6 756	6 258	- 499	*-7%*
Preparations of fruit, nuts and vegetables	7 591	7 809	*4%*	5 893	5 845	- 48	*-1%*
Vegetable oils (oilseeds and palm)	7 856	7 789	*4%*	5 629	5 719	90	*2%*
Mixed food preparations and ingredients	6 545	6 739	*4%*	5 085	5 164	79	*2%*
Vegetables	6 173	6 249	*3%*	4 748	4 697	- 51	*-1%*
Other animal products	5 080	5 564	*3%*	4 118	4 206	88	*2%*
Cereal preparations and milling products	5 242	5 350	*3%*	4 034	4 111	78	*2%*
Tobacco, cigars and cigarettes	5 105	5 420	*3%*	4 016	3 946	- 70	*-2%*
Margarine and other oils and fats (vegetable)	4 178	4 942	*3%*	3 526	3 931	405	*11%*
Spirits and liqueurs	4 380	4 329	*2%*	3 149	3 390	242	*8%*
Beef and veal	2 645	3 418	*2%*	2 378	2 753	375	*16%*
Other products	22 784	23 663	*12%*	17 870	17 795	- 75	*0%*

TABLE 9

EU AGRI-FOOD TRADE BALANCE (million EUR)

AGRI-FOOD CATEGORIES/PERIOD	EXPORTS	IMPORTS	TRADE BALANCE		
	Jan26-Sep26		Jan25-Sep25	Jan26-Sep26	*Difference*
	million EUR				
Total Agrifood	**179 185**	**139 617**	**35 584**	**39 567**	**3 984**
Cereal preparations and milling products	18 861	4 111	14 815	14 750	- 65
Dairy products	15 875	1 698	13 302	14 177	874
Wine and wine based products	12 130	1 035	11 052	11 095	42
Pigmeat	7 962	256	8 840	7 706	-1 134
Mixed food preparations and ingredients	12 089	5 164	6 908	6 925	17
Confectionery and chocolate	9 314	2 245	7 110	7 068	- 42
Beer, cider and other beverages	8 169	1 893	6 111	6 276	165
Pet food and forage crops	7 166	2 468	4 214	4 699	485
Spirits and liqueurs	6 946	3 390	3 072	3 556	484
Preparations of fruit, nuts and vegetables	9 001	5 845	3 429	3 157	- 273
Olives and olive oil	4 252	1 045	3 837	3 207	- 629
Other animal products	7 133	4 206	2 145	2 928	782
Poultry and eggs	4 785	2 550	2 701	2 235	- 465
Horticulture	3 566	1 804	1 829	1 762	- 67
Tobacco, cigars and cigarettes	6 181	3 946	2 300	2 236	- 64
Vegetables	6 707	4 697	1 930	2 010	80
Cereals	8 578	6 258	1 317	2 321	1 004
Beef and veal	4 169	2 753	1 411	1 416	6
Unspecified	745	427	488	318	- 170
Sugar and isoglucose	1 347	1 121	371	226	- 145
Sheep and goat	742	1 253	- 579	- 511	68
Margarine and other oils and fats (vegetable)	1 959	3 931	-1 688	-1 972	- 284
Vegetable oils (oilseeds and palm)	2 268	5 719	-3 901	-3 451	449
Non-edible for technical use	3 693	8 871	-4 586	-5 178	- 591
Oilseeds and protein crops	1 629	13 935	-12 279	-12 306	- 28
Fruit and nuts	5 418	23 265	-16 926	-17 847	- 921
Coffee, tea, cocoa and spices	8 500	25 733	-21 639	-17 233	4 406
For info: fish and fish products	*6 124*	*24 271*	*-17 454*	*-18 148*	*- 694*
Total agrifood and fish	*185 308*	*163 888*	*18 130*	*21 420*	*3 290*

X (former Twitter): @EUAgri

https://ec.europa.eu/agriculture

#AgriFoodTrade