



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS in July 2025

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Note to the reader

The latest available consolidated trade data at EU level cover market developments up to July 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.

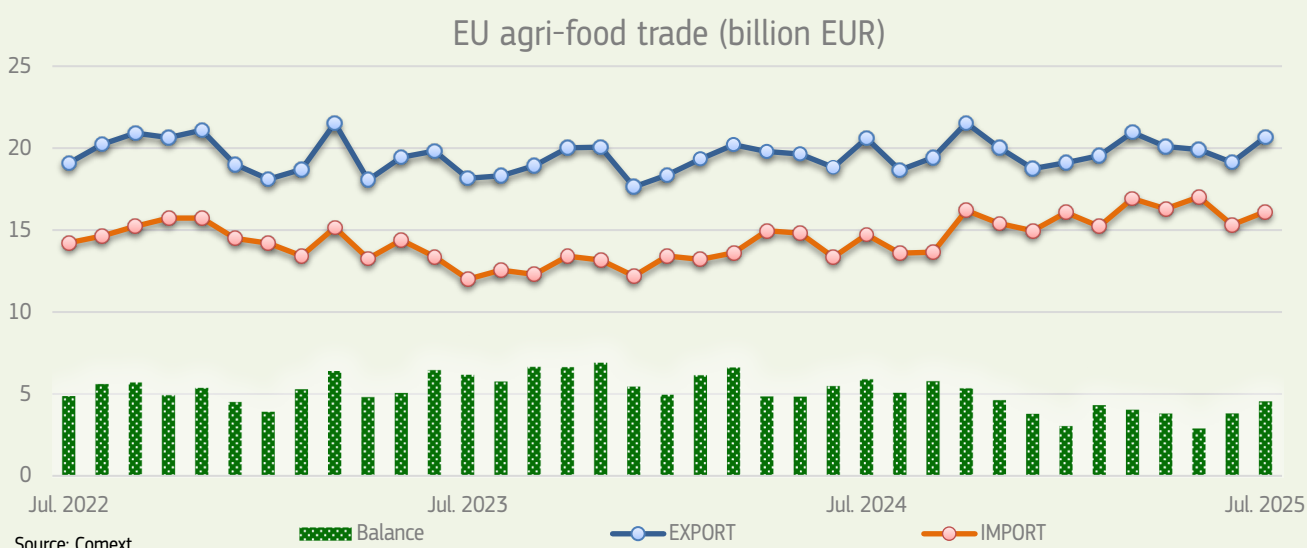
The trade figures are expressed in values, except when specifically mentioned. Price variations are based on a unit value that is the average price of products traded in the period concerned (trade value at the border divided by the quantity registered).

HIGHLIGHTS: EU exports increased in July

EU exports reached EUR 20.7 billion in July 2025, an increase of 8% on the previous month and at a stable level compared to July 2024. Since January, cumulative EU exports reached EUR 139.4 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. Exports to the UK had the largest increase, while they decreased to China.

EU imports increased by 5% month-on-month in July, reaching EUR 16.1 billion. They remain 10% higher than in July 2024. Until July 2025, cumulative imports reached EUR 113 billion, up 15% 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 continued to increase by 19% in July compared to the previous month and reached EUR 4.6 billion. It remains however 23% lower than in July 2024. Between January and July, the cumulative EU surplus reached EUR 26.5 billion. This is a reduction of EUR 12.2 billion compared to the same period in 2024, primarily due to increases in the prices of EU imports, in particular cocoa and coffee.



EU AGRI-FOOD EXPORTS

EU agri-food exports reached EUR 20.7 billion in July 2025, an increase of 8% on the previous month, but a similar level compared to July 2024. Since January, cumulative EU exports reached EUR 139.4 billion, an increase of 2% (+ EUR 2.7 billion) compared to the same period in 2024, mainly due to higher prices.

UK, US AND SWITZERLAND ARE THE TOP DESTINATIONS OF EU EXPORTS

The **UK** remained the first destination of EU exports, representing 23% of EU exports between January and July (32.4 billion). They had the largest increase over this period as they grew by EUR 1.4 billion (+5%). This is mainly explained by higher exports of cocoa products, chocolate and dairy products.

The **US** represented 13% of EU exports since January (EUR 17.6 billion). Exports to the **US** increased by EUR 478 million (+3%) compared to 2024, mainly due to higher exports of cocoa products, chocolate and dairy.

Switzerland was the third most important destination of EU exports since January, representing 6% of EU exports (EUR 7.8 billion). Exports grew by EUR 722 million (+10%), in part due to the high prices of cocoa products.

By contrast, exports to **China** decreased by EUR 628 million (-8%) between January and July compared to 2024. This is mainly explained by a strong reduction in cereal exports. Exports to

Thailand also declined by EUR 278 million (-28%), in part due to lower exports of cereals, and hides and skins.

EXPORTS OF CEREALS REMAIN LOWER

Exports in the **coffee, tea, cocoa and spices** category had the largest increase in value, rising by EUR 2 billion (+34%) between January and July compared to 2024. This was mainly driven by an 87% increase in export prices of cocoa paste, butter and powder.

Exports of **confectionery and chocolate** also increased by EUR 1.2 billion (+19%), mainly due to the high prices of chocolate exports (+29%).

Exports of **dairy products** increased by EUR 725 million (+6%), primarily due to higher prices, while volumes declined by 2%.

By contrast, EU **cereals** exports decreased by EUR 1.6 billion (-20%) in January-July 2025 compared to 2024. This is mainly explained by lower export volumes (-23%), particularly for wheat and maize.

Exports of **olives and olive oil** increased by 19% in volume, but this was offset by a 29% reduction in prices compared to the 2024 peak. This led to an overall decrease in value of EUR 671 million (-15%), however, they remain above 2023 levels.

Exports of **non-edible products for technical use** also declined by EUR 353 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 16.1 billion in July 2025**. This is **5% higher than the previous month** and **10% higher than in July 2024**. Since January, cumulative EU imports reached **EUR 113 billion**. This is an increase of **EUR 14.9 billion (+15%)** compared to 2024, mainly explained by high prices for several EU imports, particularly **cocoa and coffee**.

IMPORTS FROM COTE D'IVOIRE REMAIN HIGH

Imports from **Côte d'Ivoire** had the largest increase in value between January and July 2025 compared to 2024 (+ EUR 2.2 billion, +59%), mainly due to a large increase in cocoa prices.

Imports from **Canada** increased by EUR 1.3 billion (+93%), mainly due to large increases in rapeseed, maize and wheat imports.

Imports from the **US** increased by EUR 1.2 billion between January and July 2025 compared to 2024 (+18%), mainly due to higher maize imports and higher prices for nuts.

Imports from **Vietnam** increased by EUR 1 billion (+44%), mainly due to higher coffee imports, while those from **China** increased by EUR 996 million (+20%), due to increases across most product categories, notably non-edible products.

By contrast, imports from **Ukraine** decreased by EUR 1.2 billion (-16%), mainly due to lower imports

of cereals. Imports from **Russia** decreased by 70% (- EUR 561 million), partly due to a fall in imports of oilseeds.

COFFEE AND COCOA PRICES REMAIN HIGH

Imports of **coffee, tea, cocoa and spices** increased by EUR 9.2 billion (+57%) between January and July 2025 compared to 2024. This is mainly explained by higher import prices: cocoa prices almost doubled and coffee prices rose by 58%.

Imports of **fruit and nuts** followed with an increase of EUR 2.8 billion (+20%), mainly due to higher prices (+11%).

Among other increases, imports of **non-edible products** increased by EUR 516 million (+9%), mainly due to higher prices. Imports of **confectionery and chocolate** increased by EUR 480 million (+33%, mainly due to higher prices). Imports of **poultry and eggs** increased by EUR 386 million (+28%, due to both higher prices and volumes).

By contrast, imports of **olives and olive oil** decreased by EUR 565 million (-46%), due to both lower import prices and volumes. Imports of **cereals** decreased by 15% in volume and by EUR 400 million (-7%) in value, while prices increased by 9%. Imports of **sugar and isoglucose** decreased by EUR 354 million (-30%), mainly due to reduced volumes (-22%).

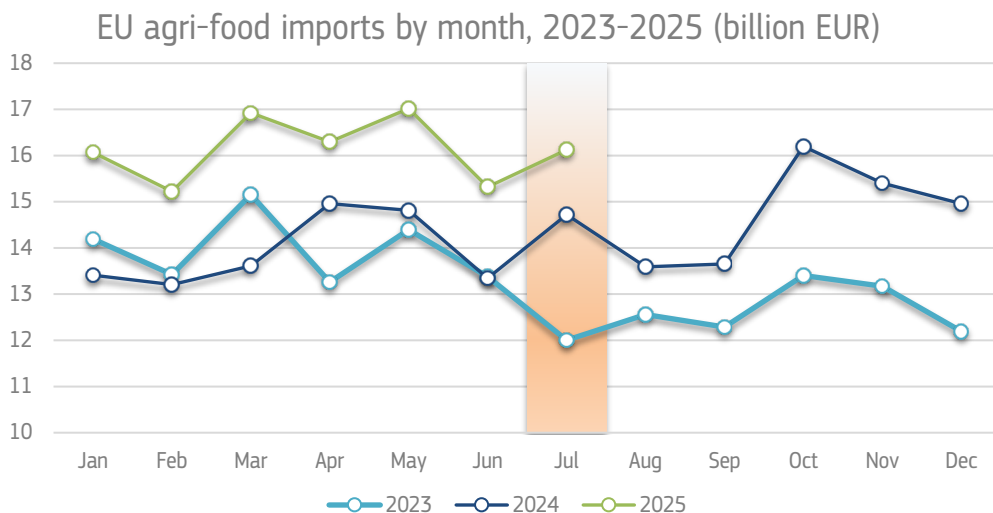


TABLE 1

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

	yearly data			monthly data			
TRADING PARTNERS	2023	2024	Share 2024	Jan24-Jul24	Jan25-Jul25	Difference	
TOTAL AGRIFOOD	228 790	235 145	100%	136 766	139 432	2 666	2%
United Kingdom	51 745	53 919	23%	30 987	32 417	1 430	5%
Switzerland	11 597	12 265	5%	7 105	7 827	722	10%
United States	27 192	30 397	13%	17 157	17 635	478	3%
Ukraine	3 461	3 630	2%	2 059	2 441	382	19%
Türkiye	4 871	5 190	2%	3 184	3 534	350	11%
Russian Federation	6 763	6 028	3%	3 504	3 258	- 246	-7%
Nigeria	1 664	1 615	1%	946	698	- 248	-26%
Japan	7 876	8 174	3%	5 024	4 757	- 268	-5%
Thailand	1 459	1 518	1%	995	717	- 278	-28%
China	14 603	13 239	6%	8 199	7 571	- 628	-8%
Other countries	97 560	99 170	42%	57 606	58 577	971	2%

TABLE 2

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

	yearly data			monthly data			
TRADING PARTNERS	2023	2024	Share 2024	Jan24-Jul24	Jan25-Jul25	Difference	
TOTAL AGRIFOOD	228 790	235 145	100%	136 766	139 432	2 666	2%
United Kingdom	51 745	53 919	23%	30 987	32 417	1 430	5%
United States	27 192	30 397	13%	17 157	17 635	478	3%
Switzerland	11 597	12 265	5%	7 105	7 827	722	10%
China	14 603	13 239	6%	8 199	7 571	- 628	-8%
Japan	7 876	8 174	3%	5 024	4 757	- 268	-5%
Norway	5 943	6 035	3%	3 501	3 847	346	10%
Türkiye	4 871	5 190	2%	3 184	3 534	350	11%
Russian Federation	6 763	6 028	3%	3 504	3 258	- 246	-7%
Canada	4 469	4 808	2%	2 627	2 827	200	8%
Saudi Arabia	4 646	4 645	2%	2 758	2 610	- 148	-5%
Korea, Republic of	4 542	4 270	2%	2 618	2 564	- 53	-2%
Ukraine	3 461	3 630	2%	2 059	2 441	382	19%
Australia	3 769	4 168	2%	2 407	2 368	- 39	-2%
Morocco	3 831	3 589	2%	2 252	2 210	- 42	-2%
Israel	2 773	2 998	1%	1 719	1 980	261	15%
Other countries	70 710	71 791	31%	41 666	41 586	- 79	0%

TABLE 3

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

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	2023	2024	Share 2024	Jan24-Jul24	Jan25-Jul25	Difference	
TOTAL AGRIFOOD	228 790	235 145	100%	136 766	139 432	2 666	2%
Coffee, tea, cocoa and spices	8 137	10 728	5%	5 906	7 900	1 994	34%
Confectionery and chocolate	10 764	11 801	5%	6 137	7 292	1 156	19%
Dairy products	19 580	19 617	8%	11 361	12 086	725	6%
Cereal preparations and milling products	24 305	24 745	11%	14 170	14 650	480	3%
Tobacco, cigars and cigarettes	7 026	7 768	3%	4 662	5 079	417	9%
Sugar and isoglucose	1 684	2 357	1%	1 386	1 201	- 185	-13%
Preparations of fruit, nuts and vegetables	12 379	12 893	5%	7 589	7 296	- 293	-4%
Non-edible for technical use	4 447	4 586	2%	2 960	2 606	- 353	-12%
Olives and olive oil	5 111	7 199	3%	4 468	3 797	- 671	-15%
Cereals	14 611	11 721	5%	7 720	6 138	-1 582	-20%
Other products	120 746	121 730	52%	70 407	71 386	979	1%

TABLE 4

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

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	2023	2024	Share 2024	Jan24-Jul24	Jan25-Jul25	Difference	
TOTAL AGRIFOOD	228 790	235 145	100%	136 766	139 432	2 666	2%
Cereal preparations and milling products	24 305	24 745	11%	14 170	14 650	480	3%
Dairy products	19 580	19 617	8%	11 361	12 086	725	6%
Wine and wine based products	17 606	17 391	7%	9 827	9 665	- 162	-2%
Mixed food preparations and ingredients	14 427	15 630	7%	9 045	9 353	308	3%
Coffee, tea, cocoa and spices	8 137	10 728	5%	5 906	7 900	1 994	34%
Preparations of fruit, nuts and vegetables	12 379	12 893	5%	7 589	7 296	- 293	-4%
Confectionery and chocolate	10 764	11 801	5%	6 137	7 292	1 156	19%
Pigmeat	12 269	12 346	5%	7 186	7 092	- 95	-1%
Beer, cider and other beverages	10 781	10 829	5%	6 445	6 333	- 112	-2%
Cereals	14 611	11 721	5%	7 720	6 138	- 1 582	-20%
Vegetables	8 802	9 279	4%	5 205	5 432	226	4%
Pet food and forage crops	8 305	8 460	4%	4 930	5 236	306	6%
Tobacco, cigars and cigarettes	7 026	7 768	3%	4 662	5 079	417	9%
Other animal products	8 320	8 269	4%	4 930	4 838	- 93	-2%
Spirits and liqueurs	9 069	8 706	4%	4 874	4 745	- 129	-3%
Other products	42 409	44 963	19%	26 777	26 297	- 480	-2%

TABLE 5

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

	yearly data			monthly data			
TRADING PARTNERS	2023	2024	Share 2024	Jan24- Jul24	Jan25- Jul25	Difference	
TOTAL AGRIFOOD	159 424	171 878	100%	98 069	112 977	14 908	15%
Côte d'Ivoire	4 055	6 760	4%	3 650	5 801	2 151	59%
Canada	2 845	2 540	1%	1 367	2 631	1 265	93%
United States	11 683	11 939	7%	6 780	8 029	1 248	18%
Viet Nam	3 216	3 836	2%	2 336	3 358	1 021	44%
China	8 347	9 155	5%	5 106	6 102	996	20%
Moldova, Republic of	891	990	1%	531	416	- 115	-22%
Indonesia	5 474	5 245	3%	2 996	2 802	- 193	-6%
Tunisia	886	1 292	1%	924	633	- 290	-31%
Russian Federation	1 892	1 027	1%	805	244	- 561	-70%
Ukraine	11 839	13 099	8%	7 638	6 432	-1 206	-16%
Other countries	108 297	115 994	67%	65 936	76 528	10 592	16%

TABLE 6

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

	yearly data			monthly data			
TRADING PARTNERS	2023	2024	Share 2024	Jan24-Jul24	Jan25-Jul25	Difference	
TOTAL AGRIFOOD	159 424	171 878	100%	98 069	112 977	14 908	15%
Brazil	17 215	17 425	10%	9 919	10 642	724	7%
United Kingdom	15 511	15 383	9%	8 674	9 256	581	7%
United States	11 683	11 939	7%	6 780	8 029	1 248	18%
Ukraine	11 839	13 099	8%	7 638	6 432	- 1 206	-16%
China	8 347	9 155	5%	5 106	6 102	996	20%
Côte d'Ivoire	4 055	6 760	4%	3 650	5 801	2 151	59%
Türkiye	6 627	7 315	4%	4 113	4 213	100	2%
Viet Nam	3 216	3 836	2%	2 336	3 358	1 021	44%
Argentina	4 663	5 559	3%	2 803	3 081	277	10%
Switzerland	4 859	5 048	3%	2 805	2 954	149	5%
Indonesia	5 474	5 245	3%	2 996	2 802	- 193	-6%
India	3 302	3 976	2%	2 272	2 731	459	20%
Canada	2 845	2 540	1%	1 367	2 631	1 265	93%
Morocco	3 182	3 447	2%	2 243	2 603	359	16%
Peru	3 089	3 768	2%	1 777	2 297	520	29%
Other countries	53 518	57 381	33%	33 588	40 044	6 456	19%

TABLE 7

EU AGRIFOOD IMPORTS – PRODUCT CATEGORIES WITH MOST IMPORTANT CHANGES (million EUR)

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2023	2024	Share 2024	Jan24-Jul24	Jan25-Jul25		
TOTAL AGRIFOOD	159 424	171 878	100%	98 069	112 977	14 908	15%
Coffee, tea, cocoa and spices	20 564	30 326	18%	16 116	25 274	9 158	57%
Fruit and nuts	22 336	24 939	15%	14 307	17 123	2 816	20%
Non-edible for technical use	9 393	9 628	6%	5 635	6 151	516	9%
Confectionery and chocolate	2 390	2 902	2%	1 470	1 950	480	33%
Poultry and eggs	2 293	2 415	1%	1 384	1 770	386	28%
Vegetable oils (oilseeds and palm)	7 708	7 586	4%	4 454	4 313	- 141	-3%
Oilseeds and protein crops	21 142	20 042	12%	11 405	11 233	- 171	-2%
Sugar and isoglucose	2 797	1 745	1%	1 185	830	- 354	-30%
Cereals	11 691	9 734	6%	5 774	5 374	- 400	-7%
Olives and olive oil	1 226	1 755	1%	1 238	672	- 565	-46%
Other products	57 885	60 804	35%	35 103	38 285	3 183	9%

TABLE 8

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2023	2024	Share 2024	Jan24-Jul24	Jan25-Jul25		
TOTAL AGRIFOOD	159 424	171 878	100%	98 069	112 977	14 908	15%
Coffee, tea, cocoa and spices	20 564	30 326	18%	16 116	25 274	9 158	57%
Fruit and nuts	22 336	24 939	15%	14 307	17 123	2 816	20%
Oilseeds and protein crops	21 142	20 042	12%	11 405	11 233	- 171	-2%
Non-edible for technical use	9 393	9 628	6%	5 635	6 151	516	9%
Cereals	11 691	9 734	6%	5 774	5 374	- 400	-7%
Preparations of fruit, nuts and vegetables	6 730	7 589	4%	4 241	4 484	243	6%
Vegetable oils (oilseeds and palm)	7 708	7 586	4%	4 454	4 313	- 141	-3%
Vegetables	5 860	6 173	4%	3 907	4 054	148	4%
Mixed food preparations and ingredients	5 958	6 543	4%	3 814	3 985	172	5%
Other animal products	5 416	5 078	3%	2 984	3 298	314	11%
Tobacco, cigars and cigarettes	4 734	5 101	3%	2 919	3 291	372	13%
Cereal preparations and milling products	4 806	5 210	3%	2 976	3 188	212	7%
Margarine and other oils and fats (vegetable)	3 908	4 170	2%	2 379	2 751	372	16%
Spirits and liqueurs	4 516	4 383	3%	2 360	2 456	96	4%
Pet food and forage crops	3 146	3 404	2%	1 972	1 968	- 4	0%
Other products	21 517	21 971	13%	12 827	14 032	1 205	9%

TABLE 9

EU AGRI-FOOD TRADE BALANCE (million EUR)

	EXPORTS	IMPORTS	TRADE BALANCE		
AGRI-FOOD CATEGORIES/PERIOD	Jan25-Jul25		Jan24-Jul24	Jan25-Jul25	Difference
	million EUR				
Total Agrifood	139 432	112 977	38 697	26 455	-12 242
Cereal preparations and milling products	14 650	3 188	11 193	11 462	269
Dairy products	12 086	1 630	10 100	10 456	356
Wine and wine based products	9 665	844	8 965	8 821	- 144
Pigmeat	7 092	208	6 966	6 883	- 82
Mixed food preparations and ingredients	9 353	3 985	5 231	5 368	136
Confectionery and chocolate	7 292	1 950	4 667	5 342	676
Beer, cider and other beverages	6 333	1 522	4 945	4 811	- 134
Pet food and forage crops	5 236	1 968	2 957	3 268	310
Olives and olive oil	3 797	672	3 230	3 124	- 106
Preparations of fruit, nuts and vegetables	7 296	4 484	3 348	2 813	- 536
Spirits and liqueurs	4 745	2 456	2 514	2 289	- 225
Poultry and eggs	3 756	1 770	2 143	1 986	- 156
Horticulture	2 858	1 399	1 430	1 460	30
Tobacco, cigars and cigarettes	5 079	3 291	1 744	1 789	45
Other animal products	4 838	3 298	1 947	1 540	- 407
Vegetables	5 432	4 054	1 299	1 377	78
Beef and veal	2 953	1 829	1 463	1 124	- 339
Sugar and isoglucose	1 201	830	201	370	169
Cereals	6 138	5 374	1 947	764	-1 182
Unspecified	607	347	530	260	- 270
Sheep and goat	536	1 030	- 313	- 494	- 181
Margarine and other oils and fats (vegetable)	1 434	2 751	-1 113	-1 317	- 203
Vegetable oils (oilseeds and palm)	1 385	4 313	-2 926	-2 929	- 3
Non-edible for technical use	2 606	6 151	-2 675	-3 545	- 870
Oilseeds and protein crops	1 270	11 233	-10 160	-9 963	196
Fruit and nuts	3 894	17 123	-10 725	-13 229	-2 504
Coffee, tea, cocoa and spices	7 900	25 274	-10 210	-17 374	-7 164
<i>For info: fish and fish products</i>	<i>4 621</i>	<i>18 041</i>	<i>-12 551</i>	<i>-13 421</i>	<i>- 870</i>
<i>Total agrifood and fish</i>	<i>144 053</i>	<i>131 018</i>	<i>26 146</i>	<i>13 035</i>	<i>-13 112</i>

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