



European
Commission



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS until April 2026

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EDITORIAL

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Data source: Eurostat COMEXT

Extraction date for statistics: 15/06/2026

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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](#).

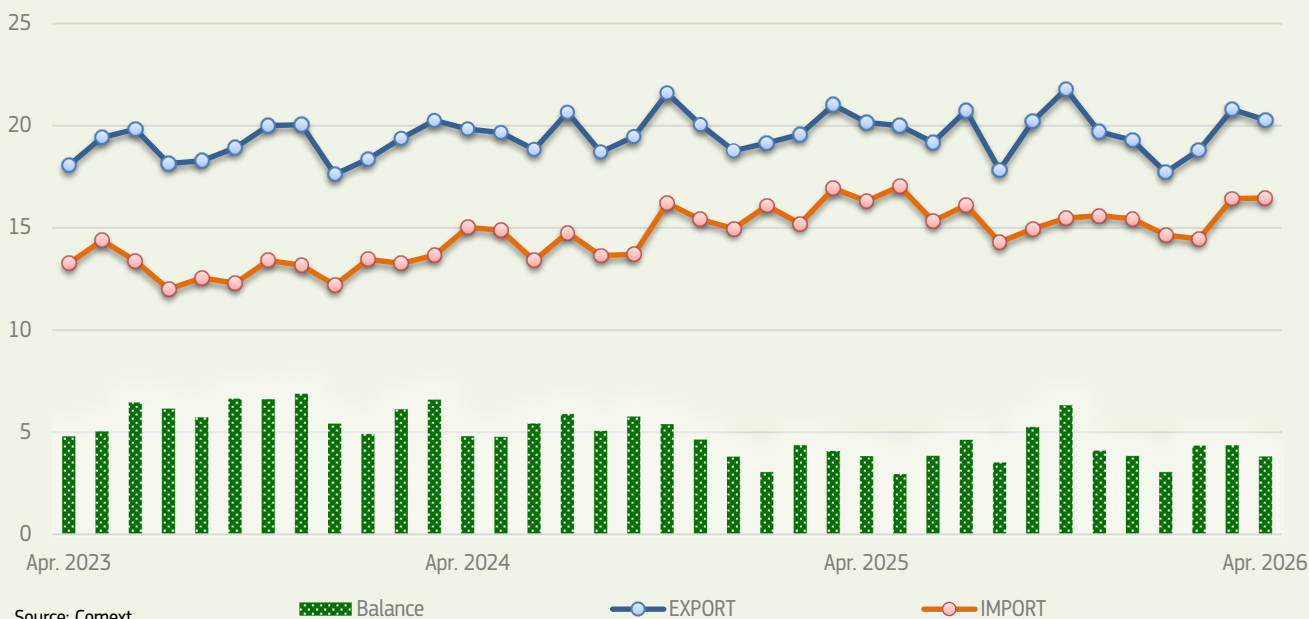
HIGHLIGHTS: EU agri-food trade surplus increased in the first four months of 2026

In April 2026, the EU exported EUR 20.3 billion agri-food products, 3% less than the previous month and 1% more than in April 2025. Cumulative exports in 2026 declined 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).

The EU imported agri-food products worth EUR 16.5 billion in April, which is stable month-on-month and 1% higher year-on-year. Cumulative 2026 imports declined year-on-year driven by the lower imports of cocoa products (mostly from Côte d'Ivoire, but also from Cameroon, Nigeria and Guinea), cereals from Canada and Ukraine, and soya beans from the US. The largest increase in imports was from Viet Nam, mainly coffee.

The EU agri-food trade surplus decreased by 12% month-on-month in April, to EUR 3.8 billion, a similar level than one year before. However, the cumulative surplus until April reached EUR 15.6 billion, which is EUR 233 million more than a year before, supported by falling cocoa prices.

EU agri-food trade (billion EUR)



Source: Comext



EU AGRI-FOOD EXPORTS

In April 2026, the EU exported EUR 20.3 billion in agri-food products, down 3% month-on-month and up 1% year-on-year. Cumulative exports since January reached EUR 77.6 billion, 3% below the year before (- EUR 2.3 billion), mostly due to reduced exports of cocoa and pigmeat.

SHARP DECREASE IN EXPORTS TO PERSIAN GULF AFTER HORMUZ CLOSURE

The UK is the main destination for EU exports. In January-April 2026, exports to the UK were slightly lower than in 2025 (-2%, - EUR 454 million). The value and volume of exports decreased in most product categories, particularly for pigmeat and cereals. However, exports of rape oil tripled (+ EUR 101 million).

The US is the second destination for EU exports and recorded the largest year-on-year decline in January-April 2026, down 14% (- EUR 1.4 billion). This follows high levels in the first months of 2025 with potential frontloading ahead of the announced US tariffs. The most significant reductions were in drinks (mostly due to lower prices) and olive oil (lower volumes and prices).

The third largest export reduction was to Japan (-14%, - EUR 380 million), driven by lower exports of tobacco and pigmeat (due to the African Swine Fever outbreak in Spain from November 2025).

Exports also declined to the United Arab Emirates (-25%, - EUR 266 million) due to the

closure of the Strait of Hormuz from March 2026. Trade with other Gulf countries was similarly affected, but flows are smaller. Exports to Kuwait, Qatar and Bahrain jointly contracted by 31% (- EUR 162 million).

By contrast, exports to Egypt rose significantly in the first four months of 2026 (+ EUR 302 million, +49%), mostly due to increased wheat exports. Exports to Ukraine also grew by EUR 104 million (+7%), with the largest increase in spirits.

LOWER VOLUMES AND PRICES FOR COCOA EXPORTS

Exports in the category coffee, tea, cocoa and spices saw the largest decrease in value, down EUR 681 million (-15%) in January-April 2026. This was mainly driven by reduced volumes (-16%) and prices (-23%) of cocoa paste, butter and powder.

Exports of pigmeat also decreased by EUR 522 million (-12%) due to lower prices.

Exports of olives and olive oil fell by EUR 367 million (-17%), due to lower olive oil prices (-12%) 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 265 million (-5%), mostly due to lower prices to the US.

The main increases in exports were in fruit and nuts (+ EUR 209 million, +9%, mainly in apples) and non-edible products (+ EUR 154 million, +10%), due increased flax exports to China.



EU AGRI-FOOD IMPORTS

The EU imported EUR 16.5 billion in agri-food products in April 2026, stable month-on-month and up 1% year-on-year. Cumulative imports since January were EUR 62.0 billion, 7% below the year before (- EUR 2.5 billion), mostly due to reduced imports of cocoa products, cereals, as well as oilseeds and protein crops.

FALLING COCOA PRICES DRIVE IMPORTS DOWN

Cocoa prices started to fall at the end of 2025. As a result, imports from most cocoa-producing countries decreased in January-April 2026. For instance: **Côte d'Ivoire** (- EUR 589 million, -17%), **Nigeria** (- EUR 344 million, -41%), **Cameroon** (- EUR 315 million, -38%) and **Guinea** (- EUR 186 million, -96%)

Imports from the **US** declined by EUR 473 million (-10%), primarily due to lower import volumes of soya beans (- EUR 411 million, -45%).

Imports from **Ukraine** also decreased (- EUR 355 million, -8%), mainly due to reduced wheat import volumes (- EUR 231 million, -71%), and of oilseeds and protein crops (- EUR 209 million, -26%).

By contrast, imports from **Viet Nam** increased year-on-year by EUR 278 million (+16%), mainly due to larger imported volumes of coffee (+53%), and despite lower prices (-20%).

LOWER CEREAL IMPORTS

Imports in the category **coffee, tea, cocoa and spices** declined the most year-on-year in January-April 2026, down EUR 1.6 billion (-12%). This is mostly due to falling prices of cocoa products (-21%), which reduced import value by EUR 1.7 billion, while volumes fell by 4%. By contrast, coffee imports rose by EUR 189 million (+10% in volume).

Imports of **cereals** followed with a decrease of EUR 834 million (-24%), mostly due to lower import volumes of wheat (-EUR 466 million, -47%), but also of maize (-13%) and rice (-21%).

Imports of **oilseeds and protein crops** decreased by EUR 371 million (-6%), mostly due to a reduction in prices (-7%). The reduction is primarily in soya beans and cake, as well as on protein crops. By contrast, imports of sunflower seeds doubled following two poor crop years in the EU.

Imports grew the most in the category **fruit and nuts** (+ EUR 591 million, +6%), with increases spread across different products, particularly avocados and hazelnuts.

Imports of **beef and veal** also increased by EUR 246 million (+25%), mainly due to higher imports from Brazil (+ EUR 113 million) and the UK (+ EUR 45 million), supported by the current short supply and high prices of EU beef and veal.

Imports of **margarine and other oils and fats** grew by EUR 174 million (+12%) due to increases in different types of oil, particularly coconut oil.

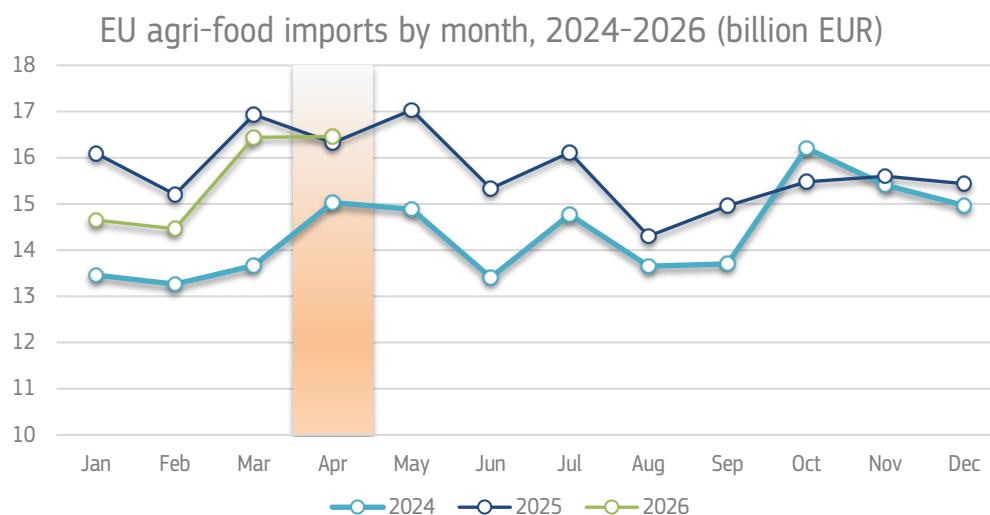


TABLE 1

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

TRADING PARTNERS	yearly data			monthly data			
	2024	2025	Share 2025	Jan25-Apr25	Jan26-Apr26	Difference	
TOTAL AGRI-FOOD	235 621	238 688	100%	79 919	77 613	- 2 305	-3%
Egypt	2 034	2 168	1%	612	914	302	49%
Ukraine	3 629	4 273	2%	1 397	1 502	104	7%
Serbia	2 675	2 883	1%	942	1 031	88	9%
South Africa	1 857	1 908	1%	583	663	79	14%
India	1 335	1 323	1%	466	540	74	16%
China	13 229	12 606	5%	4 205	3 948	- 257	-6%
United Arab Emirates	3 371	3 475	1%	1 051	785	- 266	-25%
Japan	8 161	7 656	3%	2 757	2 376	- 380	-14%
United Kingdom	53 999	55 658	23%	18 294	17 840	- 454	-2%
United States	30 403	28 594	12%	10 272	8 854	-1 418	-14%
Other countries	114 926	118 144	49%	39 339	39 162	- 177	0%

TABLE 2

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

TRADING PARTNERS	yearly data			monthly data			
	2024	2025	Share 2025	Jan25-Apr25	Jan26-Apr26	Difference	
TOTAL AGRI-FOOD	235 621	238 688	100%	79 919	77 613	- 2 305	-3%
United Kingdom	53 999	55 658	23%	18 294	17 840	- 454	-2%
United States	30 403	28 594	12%	10 272	8 854	- 1 418	-14%
Switzerland	12 262	13 184	6%	4 605	4 654	50	1%
China	13 229	12 606	5%	4 205	3 948	- 257	-6%
Japan	8 161	7 656	3%	2 757	2 376	- 380	-14%
Norway	6 032	6 521	3%	2 233	2 303	70	3%
Türkiye	5 183	6 029	3%	2 189	2 221	32	1%
Russian Federation	6 156	5 888	2%	1 980	1 870	- 110	-6%
Canada	4 803	5 071	2%	1 563	1 583	21	1%
Ukraine	3 629	4 273	2%	1 397	1 502	104	7%
Korea, Republic of	4 262	4 333	2%	1 451	1 450	- 1	0%
Saudi Arabia	4 642	4 802	2%	1 516	1 444	- 72	-5%
Australia	4 164	4 056	2%	1 277	1 238	- 38	-3%
Morocco	3 634	3 788	2%	1 405	1 215	- 190	-14%
Israel	2 993	3 350	1%	1 163	1 180	17	1%
Other countries	72 068	72 879	31%	23 612	23 936	323	1%

TABLE 3

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2024	2025	Share 2025	Jan25-Apr25	Jan26-Apr26	Difference	
TOTAL AGRI-FOOD	235 621	238 688	100%	79 919	77 613	- 2 305	-3%
Fruit and nuts	6 486	7 099	3%	2 332	2 541	209	9%
Non-edible for technical use	4 586	4 379	2%	1 547	1 701	154	10%
Other animal products	8 259	8 224	3%	2 688	2 834	146	5%
Pet food and forage crops	8 461	8 971	4%	2 980	3 124	144	5%
Vegetable oils (oilseeds and palm)	2 609	2 305	1%	818	914	96	12%
Preparations of fruit, nuts and vegetables	12 924	12 336	5%	4 182	3 930	- 252	-6%
Wine and wine based products	17 456	16 483	7%	5 305	5 040	- 265	-5%
Olives and olive oil	7 206	6 025	3%	2 187	1 821	- 367	-17%
Pigmeat	12 362	11 999	5%	4 230	3 708	- 522	-12%
Coffee, tea, cocoa and spices	10 732	13 286	6%	4 448	3 767	- 681	-15%
Other products	144 540	147 582	62%	49 203	48 234	- 969	-2%

TABLE 4

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2024	2025	Share 2025	Jan25-Apr25	Jan26-Apr26	Difference	
TOTAL AGRI-FOOD	235 621	238 688	100%	79 919	77 613	- 2 305	-3%
Cereal preparations and milling products	24 741	25 391	11%	8 211	8 035	- 176	-2%
Dairy products	19 633	20 734	9%	6 666	6 609	- 58	-1%
Mixed food preparations and ingredients	15 665	16 031	7%	5 301	5 288	- 12	0%
Wine and wine based products	17 456	16 483	7%	5 305	5 040	- 265	-5%
Preparations of fruit, nuts and vegetables	12 924	12 336	5%	4 182	3 930	- 252	-6%
Confectionery and chocolate	11 909	13 245	6%	4 062	3 818	- 244	-6%
Coffee, tea, cocoa and spices	10 732	13 286	6%	4 448	3 767	- 681	-15%
Pigmeat	12 362	11 999	5%	4 230	3 708	- 522	-12%
Cereals	11 720	10 741	5%	3 664	3 616	- 48	-1%
Vegetables	9 334	9 325	4%	3 509	3 385	- 123	-4%
Beer, cider and other beverages	10 837	10 506	4%	3 438	3 360	- 77	-2%
Pet food and forage crops	8 461	8 971	4%	2 980	3 124	144	5%
Other animal products	8 259	8 224	3%	2 688	2 834	146	5%
Spirits and liqueurs	8 769	8 313	3%	2 716	2 719	3	0%
Tobacco, cigars and cigarettes	7 778	8 324	3%	2 848	2 617	- 231	-8%
Other products	45 040	44 779	19%	15 673	15 763	90	1%

TABLE 5

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

TRADING PARTNERS	yearly data			monthly data			
	2024	2025	Share 2025	Jan25-Apr25	Jan26-Apr26	Difference	
TOTAL AGRI-FOOD	172 418	188 819	100%	64 554	62 015	- 2 539	-4%
Viet Nam	3 838	5 334	3%	1 699	1 977	278	16%
Brazil	17 468	18 596	10%	5 674	5 925	251	4%
Argentina	5 570	5 610	3%	1 690	1 811	121	7%
Chile	2 123	2 645	1%	776	895	119	15%
Egypt	2 327	2 418	1%	857	974	117	14%
Cameroon	1 560	2 284	1%	833	517	- 315	-38%
Nigeria	1 685	2 135	1%	833	489	- 344	-41%
Ukraine	13 194	10 626	6%	4 194	3 839	- 355	-8%
United States	11 963	13 211	7%	4 951	4 478	- 473	-10%
Côte d'Ivoire	6 759	8 872	5%	3 455	2 866	- 589	-17%
Other countries	105 929	117 087	62%	39 592	38 243	-1 349	-3%

TABLE 6

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

TRADING PARTNERS	yearly data			monthly data			
	2024	2025	Share 2025	Jan25-Apr25	Jan26-Apr26	Difference	
TOTAL AGRI-FOOD	172 418	188 819	100%	64 554	62 015	- 2 539	-4%
Brazil	17 468	18 596	10%	5 674	5 925	251	4%
United Kingdom	15 392	15 995	8%	5 122	4 808	- 314	-6%
United States	11 963	13 211	7%	4 951	4 478	- 473	-10%
Ukraine	13 194	10 626	6%	4 194	3 839	- 355	-8%
China	9 175	9 939	5%	3 612	3 431	- 181	-5%
Côte d'Ivoire	6 759	8 872	5%	3 455	2 866	- 589	-17%
Türkiye	7 314	6 977	4%	2 607	2 459	- 147	-6%
Viet Nam	3 838	5 334	3%	1 699	1 977	278	16%
Argentina	5 570	5 610	3%	1 690	1 811	121	7%
Morocco	3 460	3 753	2%	1 781	1 745	- 36	-2%
Switzerland	5 046	5 262	3%	1 677	1 660	- 17	-1%
Indonesia	5 426	5 204	3%	1 551	1 441	- 110	-7%
Canada	2 549	4 360	2%	1 562	1 346	- 216	-14%
Peru	3 769	4 633	2%	1 227	1 304	77	6%
India	3 978	4 433	2%	1 492	1 265	- 227	-15%
Other countries	57 517	66 013	35%	22 261	21 660	- 601	-3%

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-Apr25	Jan26-Apr26	Difference	
TOTAL AGRI-FOOD	172 418	188 819	100%	64 554	62 015	- 2 539	-4%
Fruit and nuts	24 953	28 731	15%	9 543	10 134	591	6%
Beef and veal	2 645	3 416	2%	976	1 221	246	25%
Margarine and other oils and fats (vegetable)	4 178	4 949	3%	1 492	1 666	174	12%
Poultry and eggs	2 412	2 951	2%	1 044	1 157	114	11%
Sheep and goat	1 299	1 577	1%	541	607	66	12%
Dairy products	2 257	2 697	1%	905	744	- 161	-18%
Confectionery and chocolate	2 903	3 436	2%	1 126	952	- 174	-15%
Oilseeds and protein crops	20 129	18 529	10%	6 494	6 122	- 371	-6%
Cereals	9 796	8 668	5%	3 512	2 678	- 834	-24%
Coffee, tea, cocoa and spices	30 326	41 575	22%	13 995	12 369	-1 626	-12%
Other products	71 521	72 289	38%	24 926	24 364	- 562	-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-Apr25	Jan26-Apr26	Difference	
TOTAL AGRI-FOOD	172 418	188 819	100%	64 554	62 015	- 2 539	-4%
Coffee, tea, cocoa and spices	30 326	41 575	22%	13 995	12 369	- 1 626	-12%
Fruit and nuts	24 953	28 731	15%	9 543	10 134	591	6%
Oilseeds and protein crops	20 129	18 529	10%	6 494	6 122	- 371	-6%
Non-edible for technical use	9 683	10 358	5%	3 506	3 479	- 27	-1%
Cereals	9 796	8 668	5%	3 512	2 678	- 834	-24%
Vegetables	6 173	6 243	3%	2 655	2 625	- 30	-1%
Preparations of fruit, nuts and vegetables	7 591	7 770	4%	2 566	2 522	- 44	-2%
Vegetable oils (oilseeds and palm)	7 856	7 575	4%	2 490	2 411	- 79	-3%
Mixed food preparations and ingredients	6 544	6 723	4%	2 221	2 183	- 38	-2%
Tobacco, cigars and cigarettes	5 105	5 385	3%	2 003	1 845	- 158	-8%
Other animal products	5 080	5 557	3%	1 858	1 824	- 33	-2%
Cereal preparations and milling products	5 242	5 347	3%	1 816	1 715	- 100	-6%
Margarine and other oils and fats (vegetable)	4 178	4 949	3%	1 492	1 666	174	12%
Spirits and liqueurs	4 380	4 317	2%	1 358	1 381	23	2%
Beef and veal	2 645	3 416	2%	976	1 221	246	25%
Other products	22 736	23 676	13%	8 072	7 839	- 232	-3%

TABLE 9

EU AGRI-FOOD TRADE BALANCE (million EUR)

AGRI-FOOD CATEGORIES/PERIOD	EXPORTS	IMPORTS	TRADE BALANCE		
	Jan26-Apr26		Jan25-Apr25	Jan26-Apr26	<i>Difference</i>
	million EUR				
Total Agrifood	77 613	62 015	15 365	15 598	233
Cereal preparations and milling products	8 035	1 715	6 395	6 319	- 76
Dairy products	6 609	744	5 761	5 864	103
Wine and wine based products	5 040	431	4 848	4 609	- 239
Pigmeat	3 708	118	4 116	3 589	- 526
Mixed food preparations and ingredients	5 288	2 183	3 080	3 105	25
Confectionery and chocolate	3 818	952	2 936	2 866	- 70
Beer, cider and other beverages	3 360	746	2 670	2 614	- 56
Pet food and forage crops	3 124	1 070	1 833	2 054	221
Preparations of fruit, nuts and vegetables	3 930	2 522	1 615	1 408	- 208
Spirits and liqueurs	2 719	1 381	1 358	1 338	- 20
Olives and olive oil	1 821	513	1 735	1 308	- 427
Other animal products	2 834	1 824	830	1 010	179
Horticulture	1 898	892	1 036	1 006	- 30
Cereals	3 616	2 678	152	938	786
Poultry and eggs	2 081	1 157	1 037	924	- 113
Tobacco, cigars and cigarettes	2 617	1 845	845	772	- 73
Vegetables	3 385	2 625	854	760	- 93
Beef and veal	1 802	1 221	742	581	- 161
Sugar and isoglucose	664	451	325	214	- 111
Unspecified	337	158	149	179	30
Sheep and goat	333	607	- 224	- 274	- 50
Margarine and other oils and fats (vegetable)	859	1 666	- 690	- 806	- 117
Vegetable oils (oilseeds and palm)	914	2 411	-1 672	-1 497	175
Non-edible for technical use	1 701	3 479	-1 959	-1 778	181
Oilseeds and protein crops	812	6 122	-5 648	-5 310	338
Fruit and nuts	2 541	10 134	-7 211	-7 593	- 382
Coffee, tea, cocoa and spices	3 767	12 369	-9 547	-8 602	945
<i>For info: fish and fish products</i>	<i>2 649</i>	<i>10 128</i>	<i>-7 593</i>	<i>-7 479</i>	<i>113</i>
<i>Total agrifood and fish</i>	<i>80 262</i>	<i>72 143</i>	<i>7 772</i>	<i>8 119</i>	<i>347</i>

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