



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS in January 2025

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Directorate-General for Agriculture
and Rural Development, Unit G.1

Email: Agri-G1@ec.europa.eu

Website:

https://agriculture.ec.europa.eu/international/agricultural-trade/trade-and-international-policy-analysis_en

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Note to the reader

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

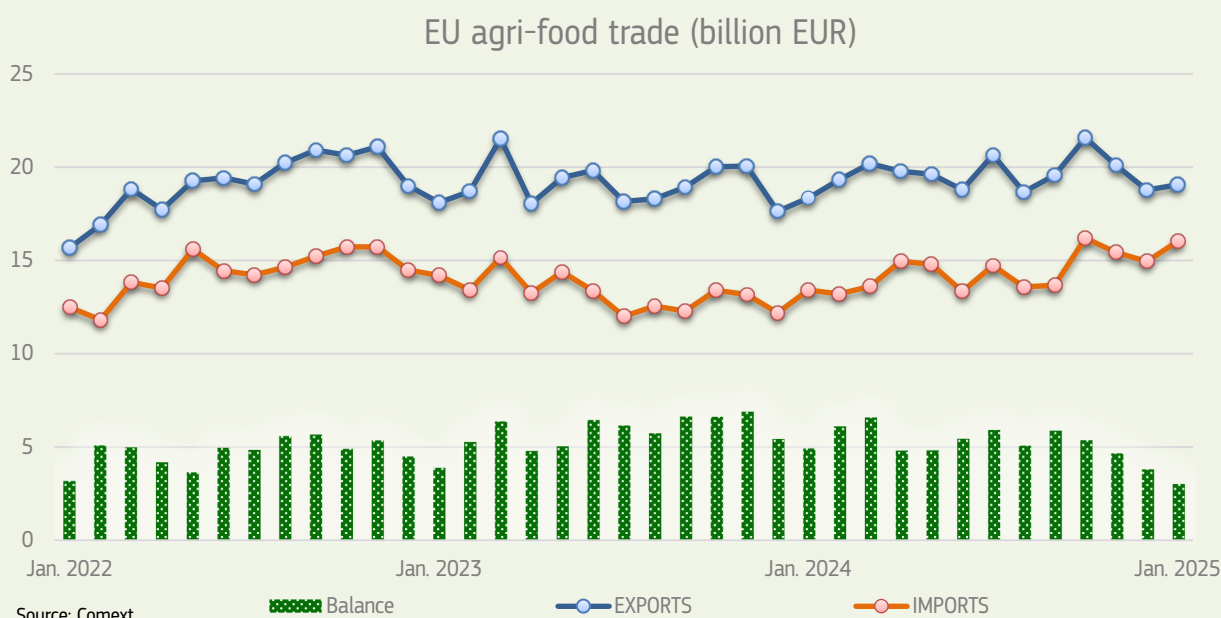
The trade figures are expressed in values, except when specifically mentioned. Price variations are based on a unit value that is the average price of products traded in the period concerned (trade value at the border divided by the quantity registered).

HIGHLIGHTS: EU agri-food trade rebounded in January 2025, with strong import values

EU exports reached EUR 19 billion in January 2025, a small increase on the previous month (+1.5%) and 4% higher than in January 2024. EU exports to the US and Switzerland increased, while exports to China decreased. The value of exports of cocoa products and coffee increased due to increases in prices, while the value of exports of cereals decreased.

EU imports increased by 7% month-on-month in January and reached EUR 16 billion, 19% higher than in January 2024. This is explained by high import prices, in particular for cocoa and coffee. Imports from Côte d'Ivoire had the largest increase in value, while those from Russia had the largest reduction.

The EU agri-food trade surplus reached EUR 3 billion in January 2025. This is a reduction of 20% compared to the previous month and a 38% reduction compared to January 2024, explained primarily by the increase of the prices of EU imports, in particular for cocoa products, coffee, and fruit and nuts.



EU AGRI-FOOD EXPORTS

EU EXPORTS REMAINED STABLE IN JANUARY 2025

EU agri-food exports reached EUR 19 billion in January 2025, a small increase on the previous month and 4% higher than in January 2024.

The **UK** remained the first destination of EU exports, with an increase of EUR 137 million (+3%) in January 2025 compared to the same month in 2024. This was explained by increases across a variety of products.

The **US** remained the second destination of EU exports in January 2025, with an increase of EUR 234 million (+10%) compared to January 2024. This is partly explained by an increase in prices of cocoa products.

Switzerland was the third destination of EU exports in January. Exports grew by EUR 154 million (+16%) compared to January 2024, due to increases in the value of cocoa products and other products.

On the other hand, EU exports to **China** had the largest reduction, with a decrease of EUR 147 million (-13%) compared to 2024. This is explained in particular by a strong reduction in cereals exports.

Other reductions in EU exports in January were observed in direction of **Algeria** (- EUR 62 million, -25%, mainly due to reductions in cereals exports), **Pakistan** (- EUR 51

million, -67%, mainly in cereals) and **Singapore** (- EUR 47 million, -32%, mainly due to reduced spirits and liqueurs exports).

EXPORTS OF CROP PRODUCTS DECLINED IN JANUARY

Exports in the **coffee, tea, cocoa and spices** category had the largest increase in value, with + EUR 396 million (+55%) in January 2025 compared to January 2024. This was mainly driven by strong increases in the price of cocoa paste, butter and powder and increases in coffee prices.

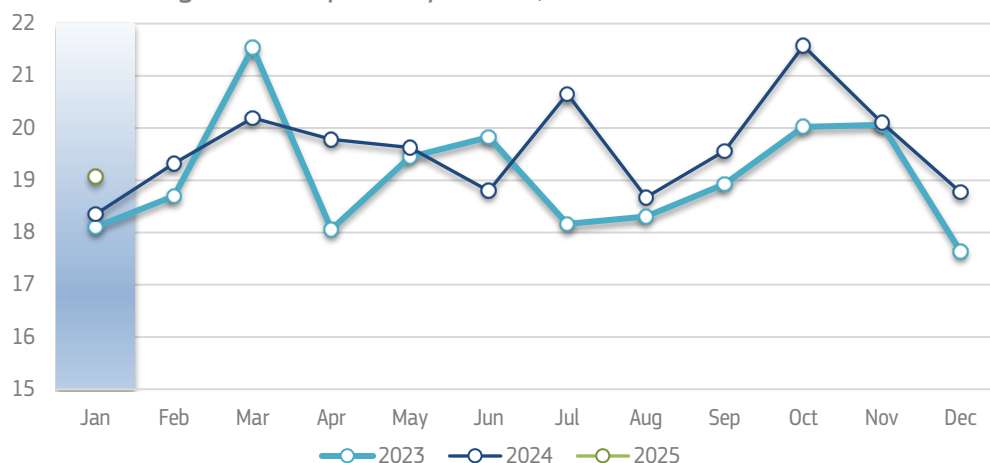
Exports of **confectionery and chocolate** also increased by EUR 150 million (+18%), mainly due to increases in prices. Exports of **dairy products** also increased by EUR 119 million (+8%), primarily due to increases in prices.

On the other hand, EU **cereals** exports had the largest reduction in value, with a decrease of EUR 466 million (-37%) in January 2025 compared to January 2024. This is mainly explained by a reduction in exported volumes, both for wheat and maize.

Exports of **oilseeds and protein crops** decreased by EUR 52 million (-22%), due to reduced volumes.

Exports of **vegetable oils** also decreased by EUR 40 million (-17%), mainly due to reduced volumes (-31%).

EU agri-food exports by month, 2023-2025 (billion EUR)



EU AGRI-FOOD IMPORTS

HIGH PRICES DROVE EU IMPORT VALUE UP IN JANUARY 2025

The value of EU agri-food imports reached **EUR 16 billion** in January 2025. This is 7% higher than the previous month and 19% higher than in January 2024. This is explained primarily by high prices for a number of EU imports, in particular for cocoa products and coffee.

Imports originating from **Côte d'Ivoire** had the largest increase in value in January 2025 compared to January 2024 (+ EUR 438 million, +77%), mainly due to high cocoa prices. Imports from **Ghana** increased by EUR 233 million (+153%) for the same reason.

Imports from **China** increased by EUR 302 million (+46%), due to increases across all products categories except olives and olive oil and spirits and liqueurs.

Imports from the **US** increased by EUR 239 million (+21%), in particular due to an increase in imports of maize, and spirits and liqueurs, as well as to higher prices for imported nuts.

Imports from **Canada** increased by EUR 179 million (+65%) in January 2025 compared to January 2024, mainly due to higher oilseeds and cereals imports.

On the other hand, imports from **Brazil** declined by EUR 140 million (-10%), mainly due to lower oilseeds imports. Imports from **Ukraine** also decreased by EUR 125 million (-9%), mainly due to

lower imports of cereals compared to January 2024.

Imports from **Russia** decreased by 79% in January 2025 compared to January 2024, largely due to a sharp reduction in oilseeds and cereals imports.

COCOA AND COFFEE PRICES KEEP ON RISING

Imports of **coffee, tea, cocoa and spices** increased by EUR 1.4 billion (+66%) in January 2025 compared to January 2024. This is explained by the strong increase in the import prices of cocoa products, which more than doubled in one year, as well as in coffee prices which increased by more than 50%.

Imports of **fruit and nuts** also grew by EUR 436 billion (+23%), mainly due to increased prices (+15%). Imports of non-edible products also increased by EUR 177 million (+25%), due to both higher prices and volumes.

On the other hand, imports of **oilseeds and protein crops** declined by EUR 189 million (-10%), mainly due to lower prices.

Imports of **sugar and isoglucose** also decreased by EUR 112 million (-53%). This is mainly explained by reduced imported volumes, while import prices remained stable.

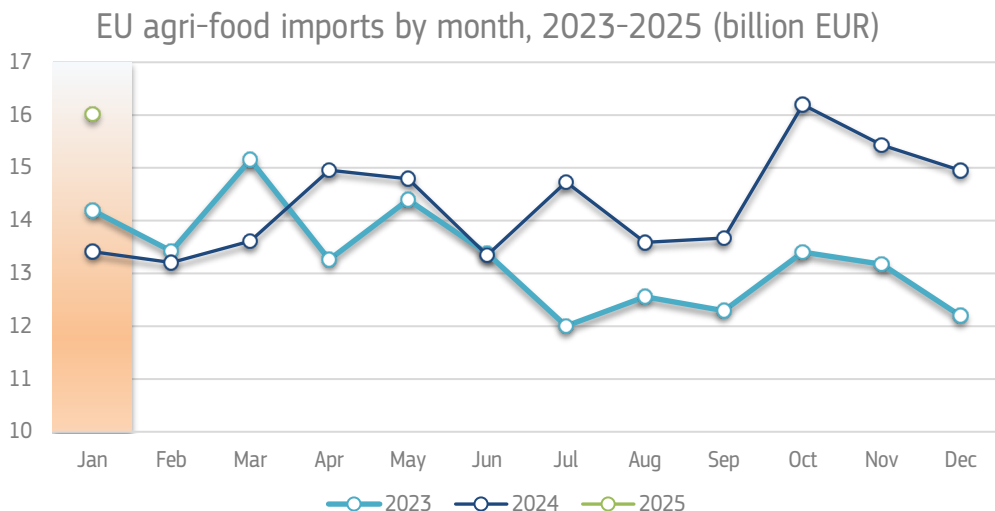


TABLE 1

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

	yearly data			monthly data			
TRADING PARTNERS	2023	2024	Share 2024	Jan. 2024	Jan. 2025	Difference	
TOTAL AGRIFOOD	228 794	235 409	100%	18 348	19 063	716	4%
United States	27 192	30 534	13%	2 236	2 470	234	10%
Switzerland	11 597	12 272	5%	965	1 119	154	16%
United Kingdom	51 744	53 944	23%	4 269	4 406	137	3%
Türkiye	4 871	5 166	2%	410	506	96	23%
Israel	2 773	2 903	1%	221	293	72	32%
Saudi Arabia	4 646	4 622	2%	390	361	- 29	-7%
Singapore	2 369	2 034	1%	148	101	- 47	-32%
Pakistan	442	383	0%	76	25	- 51	-67%
Algeria	2 825	2 824	1%	248	186	- 62	-25%
China	14 603	13 242	6%	1 114	968	- 147	-13%
Other countries	105 732	107 484	46%	8 270	8 629	359	4%

TABLE 2

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

	yearly data			monthly data			
TRADING PARTNERS	2023	2024	Share 2024	Jan. 2024	Jan. 2025	Difference	
TOTAL AGRIFOOD	228 794	235 409	100%	18 348	19 063	716	4%
United Kingdom	51 744	53 944	23%	4 269	4 406	137	3%
United States	27 192	30 534	13%	2 236	2 470	234	10%
Switzerland	11 597	12 272	5%	965	1 119	154	16%
China	14 603	13 242	6%	1 114	968	- 147	-13%
Japan	7 876	8 334	4%	668	667	- 2	0%
Norway	5 944	6 037	3%	500	552	52	10%
Türkiye	4 871	5 166	2%	410	506	96	23%
Russian Federation	6 763	6 010	3%	478	460	- 18	-4%
Canada	4 469	4 809	2%	335	370	35	10%
Morocco	3 831	3 605	2%	352	362	10	3%
Saudi Arabia	4 646	4 622	2%	390	361	- 29	-7%
Korea, Republic of	4 542	4 271	2%	331	338	7	2%
Australia	3 769	4 170	2%	306	327	21	7%
Ukraine	3 461	3 634	2%	311	316	5	2%
Israel	2 773	2 903	1%	221	293	72	32%
Other countries	70 714	71 855	31%	5 461	5 548	87	2%

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	Jan. 2024	Jan. 2025	Difference	
TOTAL AGRIFOOD	228 794	235 409	100%	18 348	19 063	716	4%
Coffee, tea, cocoa and spices	8 137	10 738	5%	719	1 115	396	55%
Confectionery and chocolate	10 764	11 806	5%	838	988	150	18%
Dairy products	19 580	19 691	8%	1 493	1 612	119	8%
Tobacco, cigars and cigarettes	7 026	7 770	3%	622	695	73	12%
Vegetables	8 802	9 280	4%	857	929	72	8%
Preparations of fruit, nuts and vegetables	12 379	12 893	5%	1 051	1 036	- 15	-1%
Olives and olive oil	5 111	7 199	3%	552	515	- 37	-7%
Vegetable oils (oilseeds and palm)	3 534	2 604	1%	236	196	- 40	-17%
Oilseeds and protein crops	2 507	2 117	1%	235	183	- 52	-22%
Cereals	14 611	11 716	5%	1 256	790	- 466	-37%
Other products	136 345	139 595	59%	10 489	11 005	516	5%

TABLE 4

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

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	2023	2024	Share 2024	Jan. 2024	Jan. 2025	Difference	
TOTAL AGRIFOOD	228 794	235 409	100%	18 348	19 063	716	4%
Cereal preparations and milling products	24 305	24 757	11%	1 925	1 990	65	3%
Dairy products	19 580	19 691	8%	1 493	1 612	119	8%
Mixed food preparations and ingredients	14 427	15 603	7%	1 207	1 266	59	5%
Wine and wine based products	17 606	17 384	7%	1 108	1 166	59	5%
Coffee, tea, cocoa and spices	8 137	10 738	5%	719	1 115	396	55%
Preparations of fruit, nuts and vegetables	12 379	12 893	5%	1 051	1 036	- 15	-1%
Pigmeat	12 269	12 365	5%	1 003	1 014	11	1%
Confectionery and chocolate	10 764	11 806	5%	838	988	150	18%
Vegetables	8 802	9 280	4%	857	929	72	8%
Beer, cider and other beverages	10 781	10 923	5%	838	827	- 11	-1%
Cereals	14 611	11 716	5%	1 256	790	- 466	-37%
Pet food and forage crops	8 306	8 459	4%	688	714	26	4%
Tobacco, cigars and cigarettes	7 026	7 770	3%	622	695	73	12%
Other animal products	8 324	8 297	4%	581	622	41	7%
Spirits and liqueurs	9 069	8 863	4%	559	572	13	2%
Other products	42 410	44 866	19%	3 603	3 725	122	3%

TABLE 5

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

	yearly data			monthly data			
TRADING PARTNERS	2023	2024	Share 2024	Jan. 2024	Jan. 2025	Difference	
TOTAL AGRIFOOD	159 430	171 887	100%	13 411	16 020	2 609	19%
Côte d'Ivoire	4 055	6 760	4%	571	1 009	438	77%
China	8 347	9 154	5%	662	964	302	46%
United States	11 683	11 947	7%	1 115	1 354	239	21%
Ghana	1 306	1 724	1%	152	385	233	153%
Canada	2 844	2 539	1%	277	455	179	65%
Moldova, Republic of	891	989	1%	77	52	- 24	-32%
Egypt	1 943	2 307	1%	189	153	- 36	-19%
Russian Federation	1 892	1 027	1%	143	30	- 112	-79%
Ukraine	11 839	13 094	8%	1 317	1 192	- 125	-9%
Brazil	17 215	17 426	10%	1 331	1 192	- 140	-10%
Other countries	97 415	104 920	61%	7 577	9 233	1 656	22%

TABLE 6

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

	yearly data			monthly data			
TRADING PARTNERS	2023	2024	Share 2024	Jan. 2024	Jan. 2025	Difference	
TOTAL AGRIFOOD	159 430	171 887	100%	13 411	16 020	2 609	19%
United States	11 683	11 947	7%	1 115	1 354	239	21%
United Kingdom	15 517	15 391	9%	1 134	1 195	60	5%
Ukraine	11 839	13 094	8%	1 317	1 192	- 125	-9%
Brazil	17 215	17 426	10%	1 331	1 192	- 140	-10%
Côte d'Ivoire	4 055	6 760	4%	571	1 009	438	77%
China	8 347	9 154	5%	662	964	302	46%
Türkiye	6 627	7 314	4%	675	764	89	13%
Argentina	4 663	5 558	3%	313	459	146	46%
Canada	2 844	2 539	1%	277	455	179	65%
Morocco	3 182	3 447	2%	412	423	11	3%
Switzerland	4 859	5 048	3%	380	412	32	8%
Ghana	1 306	1 724	1%	152	385	233	153%
Indonesia	5 474	5 266	3%	302	357	54	18%
Viet Nam	3 216	3 836	2%	239	338	98	41%
Peru	3 089	3 766	2%	291	327	36	12%
Other countries	55 515	59 616	35%	4 238	5 195	957	23%

TABLE 7

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

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	2023	2024	Share 2024	Jan. 2024	Jan. 2025	Difference	
TOTAL AGRIFOOD	159 430	171 887	100%	13 411	16 020	2 609	19%
Coffee, tea, cocoa and spices	20 564	30 326	18%	2 125	3 533	1 408	66%
Fruit and nuts	22 336	24 928	15%	1 866	2 302	436	23%
Non-edible for technical use	9 393	9 654	6%	703	879	177	25%
Tobacco, cigars and cigarettes	4 734	5 097	3%	368	488	121	33%
Other animal products	5 416	5 073	3%	395	490	95	24%
Cereals	11 691	9 732	6%	920	911	- 9	-1%
Vegetables	5 860	6 171	4%	611	602	- 10	-2%
Olives and olive oil	1 226	1 755	1%	128	107	- 21	-17%
Sugar and isoglucose	2 797	1 742	1%	209	97	- 112	-53%
Oilseeds and protein crops	21 141	20 040	12%	1 824	1 635	- 189	-10%
Other products	54 271	57 369	33%	4 262	4 976	714	17%

TABLE 8

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

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	2023	2024	Share 2024	Jan. 2024	Jan. 2025	Difference	
TOTAL AGRIFOOD	159 430	171 887	100%	13 411	16 020	2 609	19%
Coffee, tea, cocoa and spices	20 564	30 326	18%	2 125	3 533	1 408	66%
Fruit and nuts	22 336	24 928	15%	1 866	2 302	436	23%
Oilseeds and protein crops	21 141	20 040	12%	1 824	1 635	- 189	-10%
Cereals	11 691	9 732	6%	920	911	- 9	-1%
Non-edible for technical use	9 393	9 654	6%	703	879	177	25%
Preparations of fruit, nuts and vegetables	6 730	7 588	4%	619	697	79	13%
Vegetable oils (oilseeds and palm)	7 708	7 588	4%	566	605	39	7%
Vegetables	5 860	6 171	4%	611	602	- 10	-2%
Mixed food preparations and ingredients	5 958	6 536	4%	480	540	60	12%
Other animal products	5 416	5 073	3%	395	490	95	24%
Tobacco, cigars and cigarettes	4 734	5 097	3%	368	488	121	33%
Cereal preparations and milling products	4 811	5 221	3%	407	463	56	14%
Margarine and other oils and fats (vegetable	3 908	4 170	2%	263	335	72	27%
Pet food and forage crops	3 146	3 410	2%	256	293	37	14%
Spirits and liqueurs	4 517	4 386	3%	245	284	39	16%
Other products	21 517	21 968	13%	1 763	1 963	200	11%

TABLE 9

EU AGRI-FOOD TRADE BALANCE (million EUR)

	EXPORTS	IMPORTS	TRADE BALANCE		
AGRI-FOOD CATEGORIES/PERIOD	Jan. 2025		Jan. 2024	Jan. 2025	Difference
	million EUR				
TOTAL Agrifood	19 063	16 020	4 937	3 044	-1 893
Cereal preparations and milling products	1 990	463	1 518	1 527	9
Dairy products	1 612	209	1 319	1 403	84
Wine and wine based products	1 166	116	991	1 051	60
Pigmeat	1 014	29	973	985	12
Mixed food preparations and ingredients	1 266	540	727	726	- 1
Confectionery and chocolate	988	283	612	705	92
Beer, cider and other beverages	827	170	686	657	- 29
Pet food and forage crops	714	293	432	422	- 11
Olives and olive oil	515	107	425	409	- 16
Preparations of fruit, nuts and vegetables	1 036	697	432	339	- 93
Vegetables	929	602	245	327	82
Spirits and liqueurs	572	284	314	289	- 26
Poultry and eggs	525	261	287	264	- 23
Tobacco, cigars and cigarettes	695	488	254	206	- 48
Horticulture	390	205	164	185	22
Other animal products	622	490	186	133	- 54
Beef and veal	398	273	119	125	6
Sugar and isoglucose	218	97	- 11	121	132
Unspecified	96	108	60	- 12	- 72
Sheep and goat	65	104	- 41	- 39	1
Cereals	790	911	336	- 120	- 457
Margarine and other oils and fats (vegetable)	194	335	- 90	- 142	- 52
Vegetable oils (oilseeds and palm)	196	605	- 330	- 409	- 79
Non-edible for technical use	378	879	- 325	- 502	- 177
Oilseeds and protein crops	183	1 635	-1 589	-1 452	137
Fruit and nuts	568	2 302	-1 353	-1 734	- 381
Coffee, tea, cocoa and spices	1 115	3 533	-1 406	-2 418	-1 011
<i>For info: fish and fish products</i>	<i>657</i>	<i>2 803</i>	<i>-1 809</i>	<i>-2 147</i>	<i>- 337</i>
<i>Total agrifood and fish</i>	<i>19 720</i>	<i>18 823</i>	<i>3 127</i>	<i>897</i>	<i>-2 230</i>

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