



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS until August 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](#).

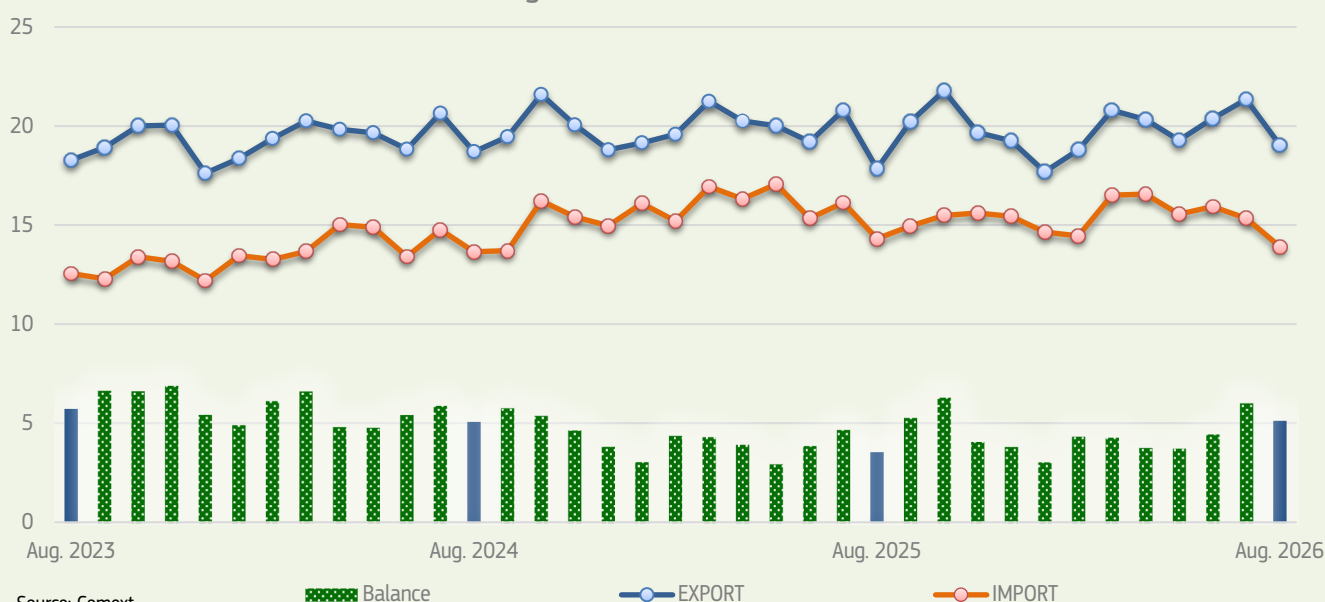
HIGHLIGHTS: Cumulative EU agri-food exports until August stable, while imports decrease

In August 2026, the EU exported EUR 19.0 billion agri-food products, 11% less than in the previous month and 7% above August 2025. Cumulative exports in 2026 were stable year-on-year. Exports contracted particularly for cocoa paste, butter and powder, pigmeat and olive oil. These decreases were compensated by increases across several product categories, including other animal products, spirits and liqueurs, vegetable oils, non-edible for technical use, and fruit and nuts.

The EU imported agri-food products worth EUR 13.9 billion in August, down 9% from the previous month and 3% below last year. Cumulative 2026 imports declined by 4% year-on-year, driven by lower prices of cocoa products. Imports also contracted for cereals (particularly wheat and rice), as well as for dairy products. The largest increases in imports were for fruit and nuts, and non-edible products.

The EU agri-food trade surplus decreased by 14% month-on-month in August, to EUR 5.1 billion, however it remained 45% above August 2025. The cumulative surplus in the first eight months of 2026 widened to EUR 34.7 billion, EUR 4.1 billion more than a year before, supported by falling cocoa prices.

EU agri-food trade (billion EUR)



Source: Comext



EU AGRI-FOOD EXPORTS

In August 2026, the EU exported EUR 19.0 billion in agri-food products, down 11% month-on-month and up 7% year-on-year. Since January, cumulative exports reached EUR 157.7 billion, a figure close to last year's (- EUR 419 million).

EXPORTS TO GULF COUNTRIES BACK TO AVERAGE LEVELS

The main export reduction in January-August 2026 was to the **US** (- 6%, - EUR 1.2 billion). 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 (18%), beer (-39%), cocoa products (32%) and wine (-5%); while exports of spirits and liqueurs grew by 9%. Nevertheless, exports to the US are higher than a year before since July.

The second largest export reduction was to the **UK** (-2%, - EUR 887 million) with decreases in cocoa products (-54%, due to falling prices), pigmeat (-13%) and cereals (-25%, due to lower volumes).

Exports to **Japan** also decreased (-11%, - EUR 567 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** (-19%, - EUR 426 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 320 million (+8%) mostly due to beef and veal shipments. Exports to **India** also grew by EUR 253 million (+29%), with the largest increase in sunflower oil.

REDUCED PIGMEAT EXPORTS

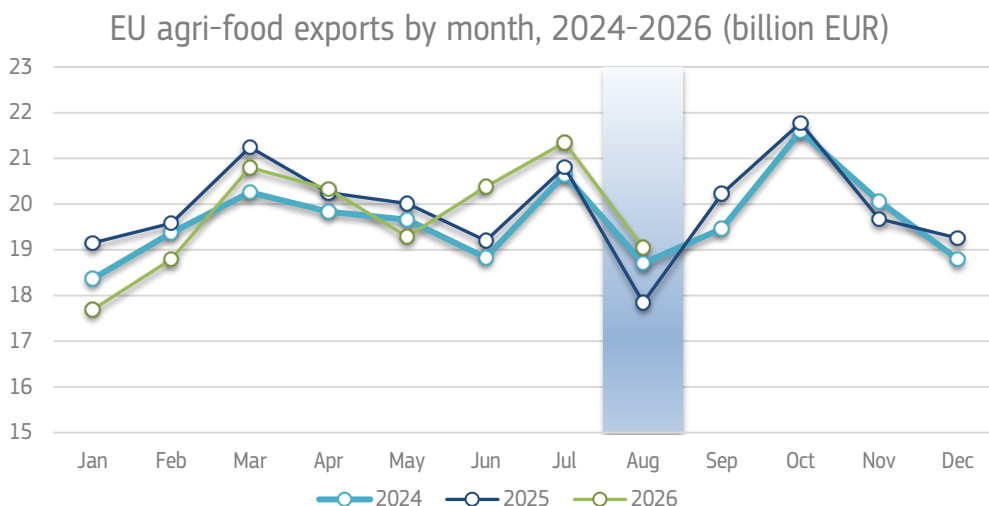
Exports in the category **coffee, tea, cocoa and spices** saw the largest decrease in value, down EUR 1.4 billion (-16%) in the first eight months of 2026. The main driver was the reduced volumes (-8%) and prices (-32%) of cocoa paste, butter and powder, however volumes are above 2025 levels from June.

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.

Exports of **olives and olive oil** declined by EUR 422 million (-10%), due to lower olive oil prices (-5%) and volumes (-6%), in particular to the US, but also to Canada and Australia.

The main increase in exports was in the category **other animal products** (+ EUR 751 million, +14%), mostly due to higher prices of milk proteins and larger volumes of furskins.

Exports of **spirits and liqueurs** also grew (+ EUR 583 million, +11%), mostly to Ukraine and the US, but also to Russia and Kazakhstan.



EU AGRI-FOOD IMPORTS

The EU imported EUR 13.9 billion in agri-food products in August 2026, down 9% month-on-month and 3% year-on-year. Cumulative imports since January were EUR 122.9 billion, 4% below the year before (- EUR 4.5 billion), mostly due to reduced cocoa prices.

COCOA PRICES KEEP FALLING

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

Côte d'Ivoire (-22%, - EUR 1.4 billion),
Cameroon (-46%, - EUR 732 million),
Nigeria (-47%, - EUR 725 million) and
Guinea (-94%, - EUR 281 million).

Imports from the **UK** also declined by 7% (- EUR 690 million), with reductions across most product categories, particularly fresh dairy products and cocoa products.

Imports from **Canada** decreased by 19% (- EUR 551 million), primarily due to lower import volumes of maize, and lower import volumes and prices of wheat.

By contrast, imports from **Brazil** grew year-on-year by 4% (+ EUR 489 million) mostly due to increased soya beans volumes. Imports from **Argentina** grew by 8% (+ EUR 292 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-August 2026, down EUR 5.5 billion (-19%). This is mostly due to the falling prices of cocoa products (-29%), that reduced import value by EUR 4.1 billion, while volumes fell by 2%. Coffee imports also decreased (-10%, - EUR 1.3 billion) with reductions from most of the EU main trade partners:

Brazil (-18%, - EUR 728 million),
Colombia (-22%, - EUR 171 million),
Uganda (-19%, - EUR 147 million),
Ethiopia (-26%, - EUR 126 million) and
Vietnam (-5%, - EUR 108 million).

Imports of **cereals** followed with a decrease of EUR 584 million (-10%), mostly due to reductions in wheat (- EUR 548 million, -34%, mostly in volumes) and rice (- EUR 212 million, -16%, in volumes and prices).

Imports of **dairy products** decreased by EUR 391 million (-21%), following the higher levels in 2025 favoured by high EU prices.

Imports grew the most in the category **fruit and nuts** (+ EUR 825 million, +4%), with increases spread across different products.

Imports also increased in the category **non-edible for technical use** (+ EUR 673 million, +10%), mostly due to higher volumes of fatty acids and waxes from China and Indonesia; and in the category **margarine and other oils and fats** (+ EUR 375 million, +12%), particularly coconut oil from the Philippines.

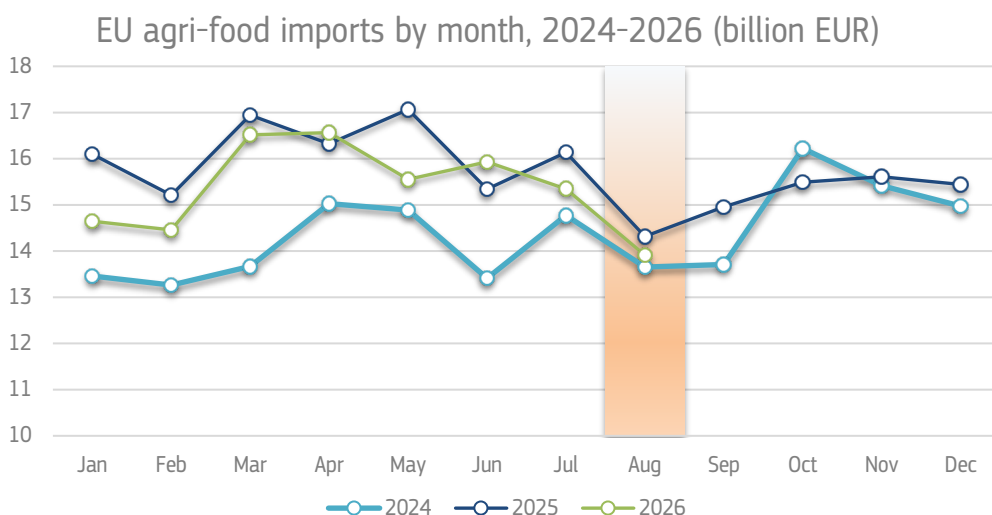


TABLE 1

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

	yearly data			monthly data			
TRADING PARTNERS	2024	2025	Share 2025	Jan25-Aug25	Jan26-Aug26	Difference	
TOTAL AGRI-FOOD	235 587	239 031	100%	158 098	157 679	- 419	0%
Türkiye	5 179	6 032	3%	3 945	4 265	320	8%
India	1 335	1 324	1%	888	1 141	253	29%
Norway	5 999	6 518	3%	4 360	4 609	248	6%
Thailand	1 525	1 244	1%	827	1 075	247	30%
Egypt	2 034	2 169	1%	1 308	1 555	247	19%
Morocco	3 634	3 785	2%	2 534	2 237	- 297	-12%
United Arab Emirates	3 371	3 474	1%	2 201	1 775	- 426	-19%
Japan	8 164	7 657	3%	5 350	4 783	- 567	-11%
United Kingdom	53 969	55 741	23%	36 906	36 019	- 887	-2%
United States	30 419	28 617	12%	19 536	18 289	-1 247	-6%
Other countries	119 958	122 469	51%	80 242	81 932	1 690	2%

TABLE 2

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

	yearly data			monthly data			
TRADING PARTNERS	2024	2025	Share 2025	Jan25- Aug25	Jan26- Aug26	Difference	
TOTAL AGRI-FOOD	235 587	239 031	100%	158 098	157 679	- 419	0%
United Kingdom	53 969	55 741	23%	36 906	36 019	- 887	-2%
United States	30 419	28 617	12%	19 536	18 289	- 1 247	-6%
Switzerland	12 261	13 173	6%	8 783	8 923	141	2%
China	13 229	12 605	5%	8 553	8 317	- 236	-3%
Japan	8 164	7 657	3%	5 350	4 783	- 567	-11%
Norway	5 999	6 518	3%	4 360	4 609	248	6%
Türkiye	5 179	6 032	3%	3 945	4 265	320	8%
Russian Federation	6 165	5 889	2%	3 743	3 666	- 76	-2%
Canada	4 801	5 072	2%	3 275	3 295	20	1%
Saudi Arabia	4 642	4 803	2%	3 003	3 246	243	8%
Ukraine	3 628	4 273	2%	2 775	2 969	195	7%
Korea, Republic of	4 261	4 336	2%	2 881	2 856	- 25	-1%
Australia	4 163	4 055	2%	2 697	2 647	- 50	-2%
Israel	2 992	3 359	1%	2 238	2 360	122	5%
Morocco	3 634	3 785	2%	2 534	2 237	- 297	-12%
Other countries	72 081	73 115	31%	47 521	49 198	1 677	4%

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-Aug25	Jan26-Aug26	Difference	
TOTAL AGRI-FOOD	235 587	239 031	100%	158 098	157 679	- 419	0%
Other animal products	8 274	8 254	3%	5 477	6 228	751	14%
Spirits and liqueurs	8 769	8 361	3%	5 471	6 054	583	11%
Vegetable oils (oilseeds and palm)	2 583	2 307	1%	1 545	1 972	427	28%
Non-edible for technical use	4 585	4 417	2%	2 911	3 308	397	14%
Fruit and nuts	6 484	7 110	3%	4 450	4 833	383	9%
Confectionery and chocolate	11 892	13 263	6%	8 370	8 014	- 355	-4%
Preparations of fruit, nuts and vegetables	12 934	12 409	5%	8 318	7 947	- 371	-4%
Olives and olive oil	7 206	6 025	3%	4 171	3 749	- 422	-10%
Pigmeat	12 371	12 012	5%	8 164	7 079	-1 085	-13%
Coffee, tea, cocoa and spices	10 722	13 288	6%	8 934	7 539	-1 395	-16%
Other products	149 767	151 585	63%	100 287	100 953	666	1%

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-Aug25	Jan26-Aug26	Difference	
TOTAL AGRI-FOOD	235 587	239 031	100%	158 098	157 679	- 419	0%
Cereal preparations and milling products	24 709	25 401	11%	16 632	16 504	- 128	-1%
Dairy products	19 635	20 719	9%	13 666	14 006	341	2%
Mixed food preparations and ingredients	15 672	16 053	7%	10 626	10 711	85	1%
Wine and wine based products	17 456	16 499	7%	10 809	10 645	- 164	-2%
Confectionery and chocolate	11 892	13 263	6%	8 370	8 014	- 355	-4%
Preparations of fruit, nuts and vegetables	12 934	12 409	5%	8 318	7 947	- 371	-4%
Coffee, tea, cocoa and spices	10 722	13 288	6%	8 934	7 539	- 1 395	-16%
Cereals	11 719	10 748	4%	7 097	7 391	294	4%
Beer, cider and other beverages	10 836	10 511	4%	7 218	7 182	- 37	-1%
Pigmeat	12 371	12 012	5%	8 164	7 079	- 1 085	-13%
Pet food and forage crops	8 458	8 977	4%	5 952	6 303	351	6%
Other animal products	8 274	8 254	3%	5 477	6 228	751	14%
Spirits and liqueurs	8 769	8 361	3%	5 471	6 054	583	11%
Vegetables	9 330	9 332	4%	6 068	5 963	- 105	-2%
Tobacco, cigars and cigarettes	7 778	8 328	3%	5 683	5 431	- 252	-4%
Other products	45 032	44 875	19%	29 614	30 681	1 066	4%

TABLE 5

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

	yearly data			monthly data			
TRADING PARTNERS	2024	2025	Share 2025	Jan25-Aug25	Jan26-Aug26	Difference	
TOTAL AGRI-FOOD	172 464	188 933	100%	127 434	122 926	- 4 508	-4%
Brazil	17 468	18 594	10%	12 280	12 769	489	4%
Argentina	5 570	5 610	3%	3 522	3 814	292	8%
Guatemala	1 098	1 188	1%	743	986	243	33%
Philippines	920	1 389	1%	884	1 057	173	20%
Tunisia	1 291	997	1%	680	848	168	25%
Canada	2 549	4 351	2%	2 923	2 372	- 551	-19%
United Kingdom	15 431	16 035	8%	10 549	9 858	- 690	-7%
Nigeria	1 685	2 135	1%	1 552	827	- 725	-47%
Cameroon	1 560	2 284	1%	1 608	876	- 732	-46%
Côte d'Ivoire	6 759	8 872	5%	6 444	5 028	-1 417	-22%
Other countries	118 132	127 477	67%	86 250	84 492	-1 758	-2%

TABLE 6

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

	yearly data			monthly data			
TRADING PARTNERS	2024	2025	Share 2025	Jan25-Aug25	Jan26-Aug26	Difference	
TOTAL AGRI-FOOD	172 464	188 933	100%	127 434	122 926	- 4 508	-4%
Brazil	17 468	18 594	10%	12 280	12 769	489	4%
United Kingdom	15 431	16 035	8%	10 549	9 858	- 690	-7%
United States	11 964	13 218	7%	8 907	8 834	- 73	-1%
Ukraine	13 194	10 627	6%	7 184	7 209	25	0%
China	9 179	9 945	5%	6 814	6 926	112	2%
Côte d'Ivoire	6 759	8 872	5%	6 444	5 028	- 1 417	-22%
Türkiye	7 314	6 978	4%	4 687	4 528	- 160	-3%
Argentina	5 570	5 610	3%	3 522	3 814	292	8%
Viet Nam	3 838	5 334	3%	3 810	3 791	- 19	-1%
Switzerland	5 046	5 262	3%	3 344	3 297	- 47	-1%
Indonesia	5 426	5 222	3%	3 260	3 210	- 50	-2%
Morocco	3 460	3 753	2%	2 740	2 776	36	1%
India	3 978	4 434	2%	3 056	2 668	- 388	-13%
Peru	3 769	4 633	2%	2 642	2 655	13	0%
Canada	2 549	4 351	2%	2 923	2 372	- 551	-19%
Other countries	57 518	66 066	35%	45 271	43 191	- 2 080	-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-Aug25	Jan26-Aug26	Difference	
TOTAL AGRI-FOOD	172 464	188 933	100%	127 434	122 926	- 4 508	-4%
Fruit and nuts	24 953	28 750	15%	19 390	20 214	825	4%
Non-edible for technical use	9 681	10 384	5%	7 004	7 677	673	10%
Margarine and other oils and fats (vegetable)	4 178	4 933	3%	3 126	3 502	375	12%
Beef and veal	2 645	3 416	2%	2 084	2 442	358	17%
Poultry and eggs	2 412	2 951	2%	1 975	2 280	304	15%
Confectionery and chocolate	2 903	3 435	2%	2 222	1 927	- 295	-13%
Oilseeds and protein crops	20 129	18 561	10%	12 676	12 346	- 330	-3%
Dairy products	2 298	2 742	1%	1 884	1 493	- 391	-21%
Cereals	9 796	8 669	5%	6 060	5 476	- 584	-10%
Coffee, tea, cocoa and spices	30 325	41 575	22%	28 360	22 843	-5 518	-19%
Other products	63 144	63 516	34%	42 652	42 726	75	0%

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-Aug25	Jan26-Aug26	Difference	
TOTAL AGRI-FOOD	172 464	188 933	100%	127 434	122 926	- 4 508	-4%
Coffee, tea, cocoa and spices	30 325	41 575	22%	28 360	22 843	- 5 518	-19%
Fruit and nuts	24 953	28 750	15%	19 390	20 214	825	4%
Oilseeds and protein crops	20 129	18 561	10%	12 676	12 346	- 330	-3%
Non-edible for technical use	9 681	10 384	5%	7 004	7 677	673	10%
Cereals	9 796	8 669	5%	6 060	5 476	- 584	-10%
Preparations of fruit, nuts and vegetables	7 591	7 768	4%	5 241	5 147	- 94	-2%
Vegetable oils (oilseeds and palm)	7 856	7 579	4%	4 906	5 008	102	2%
Mixed food preparations and ingredients	6 545	6 723	4%	4 521	4 530	9	0%
Vegetables	6 173	6 242	3%	4 395	4 288	- 106	-2%
Other animal products	5 080	5 559	3%	3 669	3 698	29	1%
Cereal preparations and milling products	5 242	5 342	3%	3 604	3 611	7	0%
Margarine and other oils and fats (vegetable)	4 178	4 933	3%	3 126	3 502	375	12%
Tobacco, cigars and cigarettes	5 105	5 387	3%	3 635	3 500	- 135	-4%
Spirits and liqueurs	4 380	4 316	2%	2 767	2 960	193	7%
Beef and veal	2 645	3 416	2%	2 084	2 442	358	17%
Other products	22 784	23 730	13%	15 993	15 683	- 310	-2%

TABLE 9

EU AGRI-FOOD TRADE BALANCE (million EUR)

	EXPORTS	IMPORTS	TRADE BALANCE		
AGRI-FOOD CATEGORIES/PERIOD	Jan26-Aug26		Jan25-Aug25	Jan26-Aug26	<i>Difference</i>
	million EUR				
Total Agrifood	157 679	122 926	30 664	34 752	4 088
Cereal preparations and milling products	16 504	3 611	13 028	12 893	- 135
Dairy products	14 006	1 493	11 782	12 513	731
Wine and wine based products	10 645	889	9 854	9 756	- 99
Pigmeat	7 079	229	7 925	6 850	-1 075
Mixed food preparations and ingredients	10 711	4 530	6 105	6 181	77
Confectionery and chocolate	8 014	1 927	6 148	6 088	- 60
Beer, cider and other beverages	7 182	1 679	5 469	5 502	34
Pet food and forage crops	6 303	2 158	3 731	4 145	414
Spirits and liqueurs	6 054	2 960	2 704	3 094	390
Preparations of fruit, nuts and vegetables	7 947	5 147	3 077	2 800	- 277
Olives and olive oil	3 749	972	3 444	2 777	- 667
Other animal products	6 228	3 698	1 808	2 530	723
Poultry and eggs	4 223	2 280	2 314	1 944	- 370
Horticulture	3 203	1 603	1 652	1 599	- 53
Tobacco, cigars and cigarettes	5 431	3 500	2 048	1 931	- 117
Vegetables	5 963	4 288	1 673	1 675	1
Cereals	7 391	5 476	1 036	1 915	878
Beef and veal	3 658	2 442	1 279	1 216	- 63
Unspecified	661	287	359	374	15
Sugar and isoglucose	1 215	1 016	374	199	- 175
Sheep and goat	712	1 150	- 533	- 438	95
Margarine and other oils and fats (vegetable)	1 726	3 502	-1 506	-1 776	- 270
Vegetable oils (oilseeds and palm)	1 972	5 008	-3 361	-3 036	326
Non-edible for technical use	3 308	7 677	-4 093	-4 369	- 276
Oilseeds and protein crops	1 420	12 346	-11 285	-10 926	358
Fruit and nuts	4 833	20 214	-14 939	-15 381	- 441
Coffee, tea, cocoa and spices	7 539	22 843	-19 427	-15 303	4 123
<i>For info: fish and fish products</i>	<i>5 367</i>	<i>21 151</i>	<i>-15 391</i>	<i>-15 784</i>	<i>- 394</i>
<i>Total agrifood and fish</i>	<i>163 045</i>	<i>144 077</i>	<i>15 273</i>	<i>18 968</i>	<i>3 695</i>

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