



European
Commission



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS in January 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).

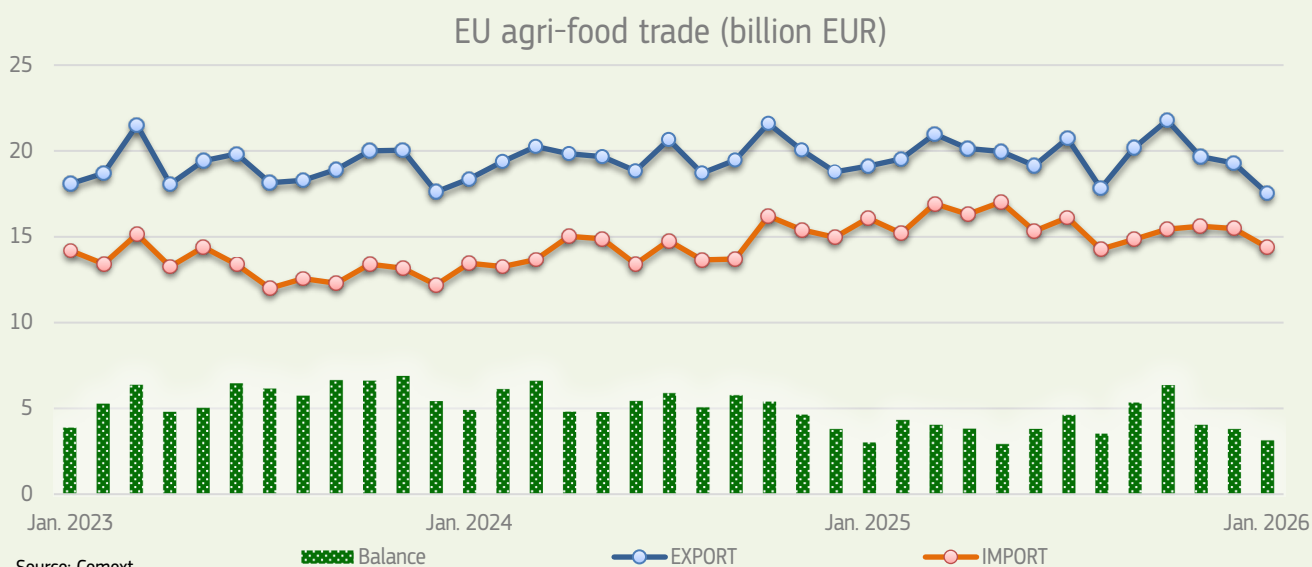
To access more data and figures behind this report, visit the dedicated trade app on the Agri-food Data Portal: [Overview of EU agri-food trade](#).

HIGHLIGHTS: Lower exports and imports in January 2026

In January 2026, the EU exported EUR 17.5 billion agri-food products, 9% less than the previous month and 8% lower than in January 2025. Exports declined most significantly to the main EU partners: the US and the UK. Export volumes and prices have contracted particularly for cocoa paste, butter and powder, but also for fruit preparations.

The EU imported agri-food products worth EUR 14.4 billion in January, which is 7% lower month-on-month and 11% lower year-on-year. The main driver of the decrease is the lower import volumes and prices of cocoa products (mostly from Côte d'Ivoire), cereals from Ukraine and soya seeds from the US. The largest increase in imports is from Brazil, particular in soya seeds and coffee.

The EU agri-food trade surplus fell by 17% month-on-month in January, to EUR 3.2 billion, however it was 4% higher than in January 2025, pushed by falling cocoa prices.



EU AGRI-FOOD EXPORTS

In January 2026, the EU exported EUR 17.5 billion, down 9% month-on-month and 8% year-on-year, due to reduced export volumes and prices across the main product categories.

LOWER EXPORTS TO MAIN TRADE PARTNERS

The **UK** is the first destination of EU exports. However, exports to the UK in January 2026 were 7% (- EUR 298 million) lower than in January 2025. The value and volume of exports decreased in most product categories.

The **US** is the second main destination of EU exports and also recorded an export decline in January 2026, down 25% (- EUR 623 million) from January 2025, when imports were at high levels partially due to potential frontloading ahead of US tariffs. The most significant reductions were in alcoholic drinks, olive oil and cocoa products.

Switzerland remains the third destination of EU exports, with exports slightly declining by 2% year-on-year (- EUR 26 million). The main reductions are in tobacco products and cereals.

Exports to **China** also fell by 4% (- EUR 42 million), driven by lower exports of pigmeat.

Other reductions in EU exports in January 2026 were observed to **Japan** (- EUR 107 million, -16%, with reduced exports of tobacco products and pigmeat), **Russia** (- EUR 64 million, -14%, with reduced exports of tobacco and cocoa products) and **Morocco** (- EUR 63 million, -17%, with

reduced soya oil exports).

COCOA EXPORTS DOWN

Exports in the category **coffee, tea, cocoa and spices** saw the largest decrease in value, with - EUR 210 million (-19%) in January 2026 compared to January 2025. This was mainly driven by reduced volumes (-20%) and prices (-19%) of cocoa paste, butter and powder.

Exports of **preparations of fruit, nuts and vegetables** also decreased by EUR 153 million (-15%), primarily due to lower exported volumes (-10%) but also to lower prices (-5%).

Exports of **cereal preparations and milling products** declined by EUR 146 million (-7%), mainly due to lower volumes of cereals preparations (-29%).

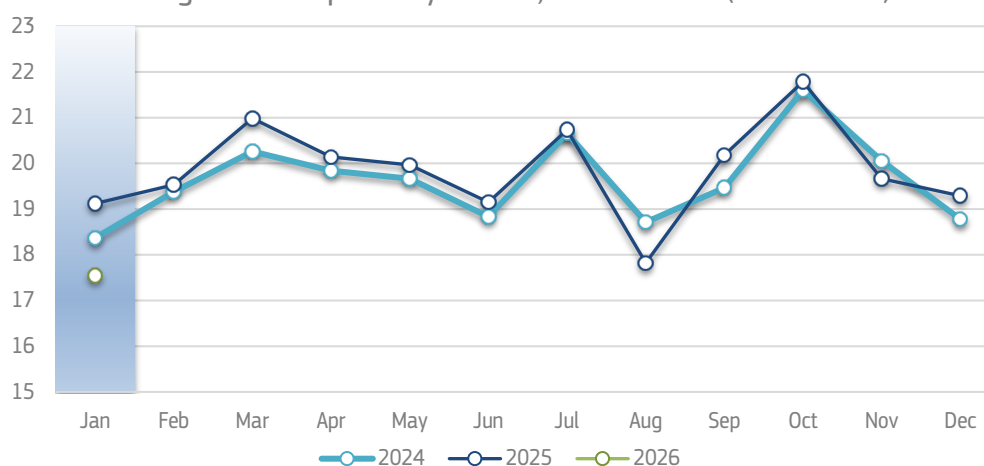
Exports of **olives and olive oil** fell by EUR 145 million (-28%), mostly due to lower olive oil prices (-20%).

Exports of **wine and wine-based products** also declined, by EUR 127 million (-11%), mainly due to lower volumes (-16%) and prices (-19%) in wine exports to the US.

Exports of **pigmeat** declined by EUR 127 million (-12%), mainly due to reduced prices (-10%).

The main increases in exports were in **cereals** (+ EUR 45 million, +6%, due to higher volumes), and **fruit and nuts** (+ EUR 31 million, +5%, mostly due to increased exports of apples and pears).

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



EU AGRI-FOOD IMPORTS

The EU imported EUR 14.4 billion in agri-food products in January 2026, down 7% month-on-month and 11% year-on-year. The main driver of the decline was a decrease in imports of cocoa beans.

LOWER IMPORTS FROM MAIN PARTNERS EXCEPT BRAZIL

Imports from **Côte d'Ivoire** saw the largest decrease in January 2026 compared with January 2025 (- EUR 416 million, -41%), driven by lower import volumes of cocoa beans (-41%) and cocoa paste, butter and powder (-36%).

Imports also decreased from **Ukraine** (- EUR 286 million, -24%), mainly due to reduced import volumes of cereals (-42%) and oilseeds and protein crops (-36%).

Imports from the **US** declined by EUR 193 million (-14%), primarily due to lower import volumes of oilseeds and protein crops (-45%).

Imports also decreased from the **UK** (- EUR 163 million, -13%) and **China** (- EUR 160 million, -17%), with reductions across most product categories

By contrast, imports from **Brazil** increased by EUR 170 million (+14%), mainly due to larger imports of coffee (+10%, due to higher prices), beef and veal (+67%), and oilseeds and protein crops (+10%). Imports are however just 2% above those of 2023 and 2024.

REDUCED COCOA IMPORTS WITH LOWER VOLUMES AND PRICES

Imports in category **coffee, tea, cocoa and spices** declined the most in January 2026 year-on-year, down EUR 654 million (-19%), mainly due to reduced import volumes (-36%) and prices (-17%) of cocoa beans. By contrast coffee imports still rose by EUR 133 million (+11%) due to higher prices (+9%).

Imports of **oilseeds and protein crops** followed with a decrease of EUR 320 million (-19%), primarily due to reduced import volumes of soya seeds (-30%), and a general reduction in overall prices in the product category (-10%)

Imports of **cereals** also fell by EUR 269 million (-30%), mostly due to lower import volumes of wheat (-69%), but also of maize (-8%).

Imports in category **non-edible for technical use** declined by EUR 131 million (-15%), mainly driven by a decrease in imports of organic chemicals (-33%).

By contrast, imports of **beef and veal** increased by EUR 76 million (+28%), mainly due to higher imports from Brazil (+67%) and Uruguay (+51%), and supported by the current short supply and high prices of EU beef and veal.

Imports also grew in the categories **margarine and other oils and fats** (+ EUR 37 million, +11%, mainly due to an increase in oilseeds and cakes) and **sugar and isoglucose** (+ EUR 24 million, +24%, with an increase in import volumes of sugar).

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

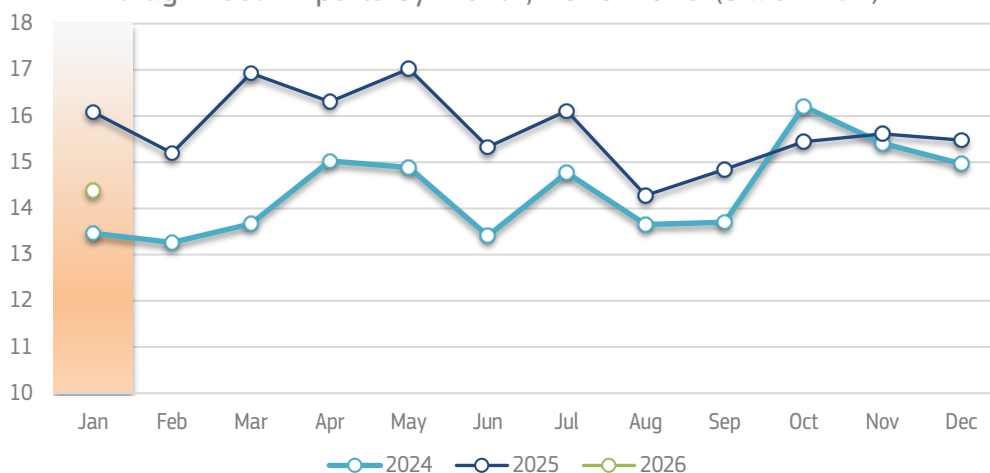


TABLE 1

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

TRADING PARTNERS	yearly data			monthly data			
	2024	2025	Share 2025	Jan. 2025	Jan. 2026	Difference	
TOTAL AGRI-FOOD	235 620	238 379	100%	19 122	17 549	- 1 573	-8%
Singapore	2 033	1 818	1%	101	147	46	46%
Egypt	2 034	2 163	1%	149	186	37	24%
Iraq	1 049	929	0%	74	105	30	41%
United Arab Emirates	3 371	3 474	1%	261	283	22	9%
Viet Nam	1 375	1 449	1%	105	126	21	20%
Morocco	3 634	3 792	2%	368	305	- 63	-17%
Russian Federation	6 156	5 774	2%	460	396	- 64	-14%
Japan	8 161	7 661	3%	668	561	- 107	-16%
United Kingdom	53 999	55 587	23%	4 428	4 130	- 298	-7%
United States	30 403	28 594	12%	2 471	1 848	- 623	-25%
Other countries	123 403	127 136	53%	10 037	9 463	- 574	-6%

TABLE 2

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

TRADING PARTNERS	yearly data			monthly data			
	2024	2025	Share 2025	Jan. 2025	Jan. 2026	Difference	
TOTAL AGRI-FOOD	235 620	238 379	100%	19 122	17 549	- 1 573	-8%
United Kingdom	53 999	55 587	23%	4 428	4 130	- 298	-7%
United States	30 403	28 594	12%	2 471	1 848	- 623	-25%
Switzerland	12 262	13 180	6%	1 118	1 093	- 26	-2%
China	13 229	12 610	5%	969	927	- 42	-4%
Japan	8 161	7 661	3%	668	561	- 107	-16%
Norway	6 032	6 517	3%	553	548	- 5	-1%
Türkiye	5 183	6 015	3%	509	484	- 24	-5%
Russian Federation	6 156	5 774	2%	460	396	- 64	-14%
Canada	4 803	5 070	2%	371	364	- 8	-2%
Ukraine	3 629	4 263	2%	316	332	16	5%
Korea, Republic of	4 262	4 335	2%	337	327	- 11	-3%
Saudi Arabia	4 642	4 800	2%	362	317	- 46	-13%
Morocco	3 634	3 792	2%	368	305	- 63	-17%
Australia	4 164	4 057	2%	327	285	- 42	-13%
United Arab Emirates	3 371	3 474	1%	261	283	22	9%
Other countries	71 688	72 650	30%	5 604	5 350	- 253	-5%

TABLE 3

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2024	2025	Share 2025	Jan. 2025	Jan. 2026	Difference	
TOTAL AGRI-FOOD	235 620	238 379	100%	19 122	17 549	- 1 573	-8%
Cereals	11 720	10 739	5%	789	834	45	6%
Fruit and nuts	6 486	6 991	3%	568	599	31	5%
Pet food and forage crops	8 461	8 968	4%	718	740	22	3%
Non-edible for technical use	4 586	4 377	2%	378	395	17	5%
Oilseeds and protein crops	2 118	2 371	1%	183	198	15	8%
Wine and wine based products	17 456	16 422	7%	1 167	1 040	- 127	-11%
Olives and olive oil	7 206	6 018	3%	516	371	- 145	-28%
Cereal preparations and milling products	24 741	25 383	11%	1 995	1 849	- 146	-7%
Preparations of fruit, nuts and vegetables	12 924	12 319	5%	1 037	884	- 153	-15%
Coffee, tea, cocoa and spices	10 732	13 278	6%	1 116	906	- 210	-19%
Other products	129 191	131 514	55%	10 654	9 732	- 922	-9%

TABLE 4

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2024	2025	Share 2025	Jan. 2025	Jan. 2026	Difference	
TOTAL AGRI-FOOD	235 620	238 379	100%	19 122	17 549	- 1 573	-8%
Cereal preparations and milling products	24 741	25 383	11%	1 995	1 849	- 146	-7%
Dairy products	19 633	20 756	9%	1 602	1 566	- 36	-2%
Mixed food preparations and ingredients	15 665	16 005	7%	1 272	1 145	- 126	-10%
Wine and wine based products	17 456	16 422	7%	1 167	1 040	- 127	-11%
Confectionery and chocolate	11 909	13 272	6%	992	927	- 64	-6%
Coffee, tea, cocoa and spices	10 732	13 278	6%	1 116	906	- 210	-19%
Pigmeat	12 362	11 999	5%	1 022	895	- 127	-12%
Preparations of fruit, nuts and vegetables	12 924	12 319	5%	1 037	884	- 153	-15%
Cereals	11 720	10 739	5%	789	834	45	6%
Vegetables	9 334	9 293	4%	930	811	- 119	-13%
Pet food and forage crops	8 461	8 968	4%	718	740	22	3%
Beer, cider and other beverages	10 837	10 506	4%	826	718	- 107	-13%
Other animal products	8 259	8 235	3%	623	600	- 24	-4%
Fruit and nuts	6 486	6 991	3%	568	599	31	5%
Tobacco, cigars and cigarettes	7 778	8 322	3%	702	586	- 116	-17%
Other products	47 323	45 893	19%	3 761	3 448	- 314	-8%

TABLE 5

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

TRADING PARTNERS	yearly data			monthly data			
	2024	2025	Share 2025	Jan. 2025	Jan. 2026	Difference	
TOTAL AGRI-FOOD	172 418	188 640	100%	16 085	14 387	- 1 698	-11%
Brazil	17 468	18 592	10%	1 193	1 363	170	14%
Viet Nam	3 838	5 334	3%	337	411	74	22%
Uruguay	590	733	0%	62	119	57	93%
Chile	2 123	2 643	1%	209	246	36	17%
Kazakhstan	328	511	0%	45	73	29	64%
China	9 175	9 931	5%	969	809	- 160	-17%
United Kingdom	15 392	16 039	9%	1 204	1 042	- 163	-13%
United States	11 963	13 207	7%	1 356	1 163	- 193	-14%
Ukraine	13 194	10 626	6%	1 192	906	- 286	-24%
Côte d'Ivoire	6 759	8 868	5%	1 007	592	- 416	-41%
Other countries	91 587	102 158	54%	8 511	7 665	- 846	-10%

TABLE 6

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

TRADING PARTNERS	yearly data			monthly data			
	2024	2025	Share 2025	Jan. 2025	Jan. 2026	Difference	
TOTAL AGRI-FOOD	172 418	188 640	100%	16 085	14 387	- 1 698	-11%
Brazil	17 468	18 592	10%	1 193	1 363	170	14%
United States	11 963	13 207	7%	1 356	1 163	- 193	-14%
United Kingdom	15 392	16 039	9%	1 204	1 042	- 163	-13%
Ukraine	13 194	10 626	6%	1 192	906	- 286	-24%
China	9 175	9 931	5%	969	809	- 160	-17%
Türkiye	7 314	6 976	4%	763	679	- 84	-11%
Côte d'Ivoire	6 759	8 868	5%	1 007	592	- 416	-41%
Argentina	5 570	5 605	3%	459	412	- 47	-10%
Viet Nam	3 838	5 334	3%	337	411	74	22%
Switzerland	5 046	5 261	3%	412	387	- 25	-6%
Morocco	3 460	3 733	2%	424	383	- 41	-10%
Indonesia	5 426	5 140	3%	365	365	0	0%
Peru	3 769	4 630	2%	326	344	18	5%
Canada	2 549	4 352	2%	455	336	- 119	-26%
India	3 978	4 430	2%	292	276	- 16	-6%
Other countries	57 517	65 919	35%	5 330	4 921	- 409	-8%

TABLE 7

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2024	2025	Share 2025	Jan. 2025	Jan. 2026	Difference	
TOTAL AGRI-FOOD	172 418	188 640	100%	16 085	14 387	- 1 698	-11%
Beef and veal	2 645	3 414	2%	273	349	76	28%
Margarine and other oils and fats (vegetable)	4 178	4 946	3%	336	373	37	11%
Sugar and isoglucose	1 744	1 512	1%	97	121	24	24%
Poultry and eggs	2 412	2 949	2%	262	278	16	6%
Sheep and goat	1 299	1 584	1%	106	115	9	9%
Confectionery and chocolate	2 903	3 436	2%	284	226	- 58	-20%
Non-edible for technical use	9 683	10 277	5%	894	763	- 131	-15%
Cereals	9 796	8 680	5%	911	642	- 269	-30%
Oilseeds and protein crops	20 129	18 521	10%	1 667	1 347	- 320	-19%
Coffee, tea, cocoa and spices	30 326	41 543	22%	3 534	2 880	- 654	-19%
Other products	87 303	91 778	49%	7 722	7 294	- 428	-6%

TABLE 8

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2024	2025	Share 2025	Jan. 2025	Jan. 2026	Difference	
TOTAL AGRI-FOOD	172 418	188 640	100%	16 085	14 387	- 1 698	-11%
Coffee, tea, cocoa and spices	30 326	41 543	22%	3 534	2 880	- 654	-19%
Fruit and nuts	24 953	28 688	15%	2 293	2 281	- 12	-1%
Oilseeds and protein crops	20 129	18 521	10%	1 667	1 347	- 320	-19%
Non-edible for technical use	9 683	10 277	5%	894	763	- 131	-15%
Cereals	9 796	8 680	5%	911	642	- 269	-30%
Preparations of fruit, nuts and vegetables	7 591	7 768	4%	698	641	- 58	-8%
Vegetable oils (oilseeds and palm)	7 856	7 567	4%	617	603	- 14	-2%
Vegetables	6 173	6 241	3%	602	571	- 31	-5%
Mixed food preparations and ingredients	6 544	6 714	4%	542	501	- 41	-8%
Tobacco, cigars and cigarettes	5 105	5 384	3%	488	478	- 10	-2%
Other animal products	5 080	5 551	3%	492	441	- 51	-10%
Cereal preparations and milling products	5 242	5 350	3%	467	429	- 37	-8%
Margarine and other oils and fats (vegetable)	4 178	4 946	3%	336	373	37	11%
Beef and veal	2 645	3 414	2%	273	349	76	28%
Spirits and liqueurs	4 380	4 312	2%	284	282	- 2	-1%
Other products	22 736	23 685	13%	1 989	1 808	- 180	-9%

TABLE 9

EU AGRI-FOOD TRADE BALANCE (million EUR)

AGRI-FOOD CATEGORIES/PERIOD	EXPORTS	IMPORTS	TRADE BALANCE		
	Jan. 2026		Jan. 2025	Jan. 2026	<i>Difference</i>
million EUR					
Total Agrifood	17 549	14 387	3 037	3 162	125
Cereal preparations and milling products	1 849	429	1 528	1 420	- 108
Dairy products	1 566	178	1 391	1 388	- 3
Wine and wine based products	1 040	109	1 051	931	- 120
Pigmeat	895	24	993	871	- 122
Confectionery and chocolate	927	226	708	701	- 6
Mixed food preparations and ingredients	1 145	501	730	645	- 85
Beer, cider and other beverages	718	166	656	553	- 103
Pet food and forage crops	740	264	425	476	51
Olives and olive oil	371	97	409	274	- 136
Preparations of fruit, nuts and vegetables	884	641	338	243	- 95
Spirits and liqueurs	574	282	295	292	- 3
Poultry and eggs	491	278	263	212	- 51
Tobacco, cigars and cigarettes	586	478	214	108	- 106
Other animal products	600	441	132	159	27
Vegetables	811	571	328	240	- 89
Horticulture	362	192	186	170	- 16
Cereals	834	642	- 121	192	314
Beef and veal	389	349	140	40	- 100
Unspecified	82	38	- 11	44	55
Sugar and isoglucose	166	121	121	45	- 76
Sheep and goat	39	115	- 38	- 76	- 38
Margarine and other oils and fats (vegetable)	189	373	- 143	- 184	- 42
Vegetable oils (oilseeds and palm)	192	603	- 415	- 411	4
Non-edible for technical use	395	763	- 516	- 368	149
Oilseeds and protein crops	198	1 347	-1 484	-1 149	335
Fruit and nuts	599	2 281	-1 725	-1 682	43
Coffee, tea, cocoa and spices	906	2 880	-2 418	-1 974	444
<i>For info: fish and fish products</i>	598	2 594	-2 154	-1 996	158
<i>Total agrifood and fish</i>	18 147	16 981	883	1 166	282

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