



# MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS in February 2025

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## EDITORIAL

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## Note to the reader

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

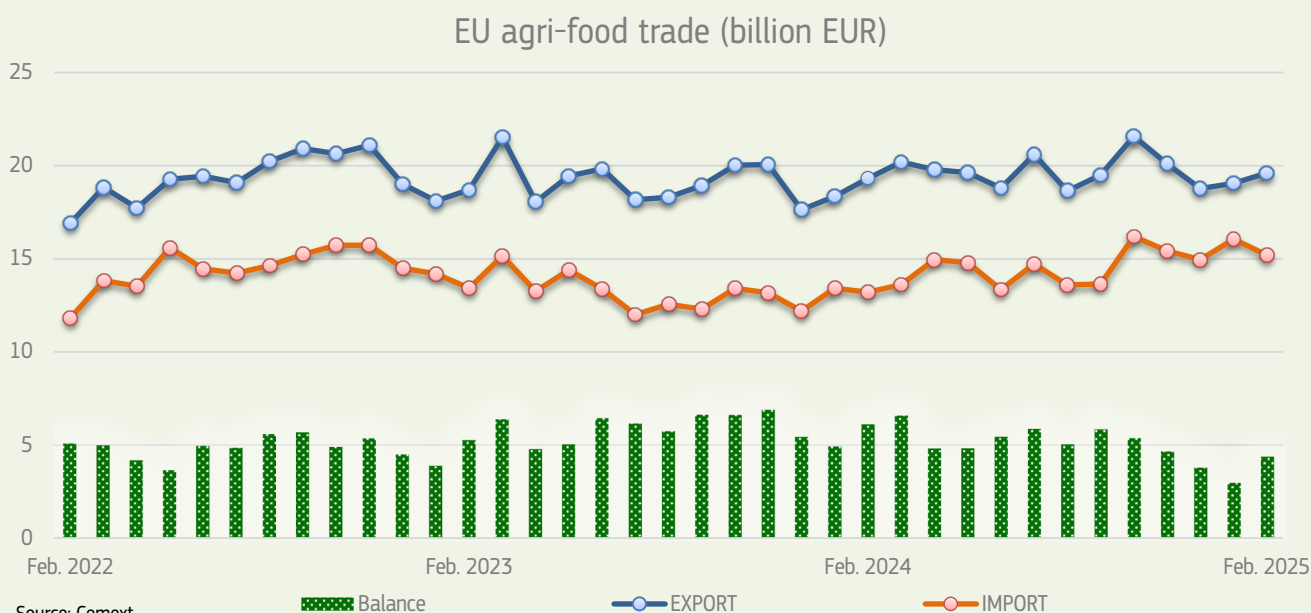


# HIGHLIGHTS: EU agri-food trade surplus rebounded in February 2025, with lower import values

EU exports reached EUR 19.6 billion in February 2025, an increase of 3 % on the previous month and 1.4 % higher than in February 2024. The value of exports of cocoa products and coffee increased due to rising prices, while it decreased for cereals.

EU imports decreased by 5 % month-on-month in February, reaching EUR 15.2 billion. This remained 15 % higher than in February 2024. This is explained by high import prices, in particular for cocoa and coffee, as well as fruit and nuts.

The EU agri-food trade surplus reached EUR 4.4 billion in February 2025. This is a 47 % increase compared to the previous month, explained by the reduced imports in February. However, this remains 28 % lower than in February 2024, primarily due to the increase in prices of EU imports, in particular for cocoa products, coffee, and fruit and nuts.



# EU AGRI-FOOD EXPORTS

## EU EXPORTS INCREASED IN FEBRUARY

**EU agri-food exports reached EUR 19.6 billion in February 2025**, a 3 % increase on the previous month and 1.4 % higher than in February 2024. In the first two months of the year, EU exports were EUR 984 million higher than in 2024 (+3 %).

The **UK** remained the first destination of EU exports, with an increase of EUR 322 million (+4 %) in January-February 2025 compared to the same months in 2024. This was explained by increases across a variety of products, including cocoa and coffee products, and protein crops.

The **US** remained the second destination of EU exports, with an increase of EUR 413 million (+9 %) in the first two months of the year compared to 2024. This is partly explained by an increase in the value of cocoa products exports and wine products.

**Switzerland** was the third destination of EU exports between January and February. Exports grew by EUR 243 million (+12 %) compared to 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 330 million (-15 %) compared to 2024. This is mainly explained a strong reduction in volumes of cereals exports (-1.5 million t, -99 %).

Other reductions in EU exports in January-February were observed in direction of **Saudi Arabia** (- EUR 91 million, -11 %), due to lower exports of tobacco, sheep and goat, and preparations of fruit, nuts and vegetables. Exports also decreased to

**Japan** (- EUR 78 million, -6 %) and **Singapore** (- EUR 62 million, -19 %, mainly due to reduced spirits and non-edible products exports) and **Pakistan** (- EUR 54 million, -51 %, mainly in cereals).

## PRICES OF COCOA PRODUCTS AND CONFECTIONERY SUSTAIN EU EXPORTS

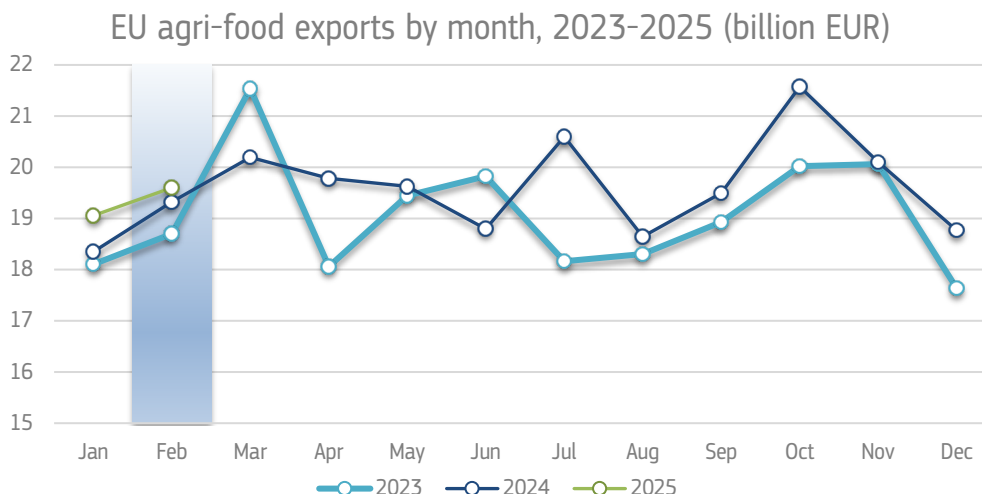
Exports in the **coffee, tea, cocoa and spices** category had the largest increase in value, by EUR 758 million (+52 %) in January-February 2025 compared to 2024. This was mainly driven by a strong price increase for cocoa paste, butter and powder, as well as coffee.

Exports of **confectionery and chocolate** also increased by EUR 329 million (+19 %), mainly due to increases in prices. Exports of **dairy products** increased by EUR 158 million (+5 %), primarily due to increases in prices.

On the other hand, EU **cereals** exports decreased by EUR 767 million (-30 %) in the first two months of 2025 compared to 2024. This is mainly explained by reductions in exported volumes, both for wheat and maize.

Exports of **preparations of fruit, nuts and vegetables** decreased by EUR 139 million (-6 %), due to reduced volumes.

Exports of **olives and olive oil** decreased by EUR 133 million (-11 %), as prices have eased up after their peak in 2024, while volumes exported increased by 9 %.



# EU AGRI-FOOD IMPORTS

## EU IMPORTS DECREASED, BUT REMAINED HIGH IN FEBRUARY

The value of EU agri-food imports reached **EUR 15.2 billion in February 2025**. This is 5 % lower than the previous month, but remains 15 % higher than in February 2024. Over the first two months of the year, they had increased by EUR 4.6 billion (+17 %) year-on-year. 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-February 2025 compared to 2024 (+ EUR 733 million, +73 %), mainly due to high cocoa prices.

Imports from **China** increased by EUR 447 million (+32 %), due to increases across most products categories, notably non-edible products (fatty acids and waxes, and plant fibres).

Imports from **Canada** increased by EUR 344 million (+80 %), mainly due to higher oilseeds and cereals imports.

Imports from **Australia** increased by EUR 330 million (+149 %), mainly due to an increase in rapeseed imports.

Imports from the **US** increased by EUR 329 million (+14 %), in particular due to an increase in imports of maize (partially replacing maize from Ukraine).

On the other hand, imports from **Ukraine** decreased by EUR 237 million (-10 %), mainly due

to lower imports of cereals (maize and wheat) and oilseeds (rapeseed).

Imports from **Russia** decreased by 77 % (- EUR 207 million) in January-February 2025 compared to 2024, largely due to a sharp reduction in imports of oilseeds and cereals.

## COCOA, COFFEE, FRUIT AND NUTS DRIVE EU IMPORTS

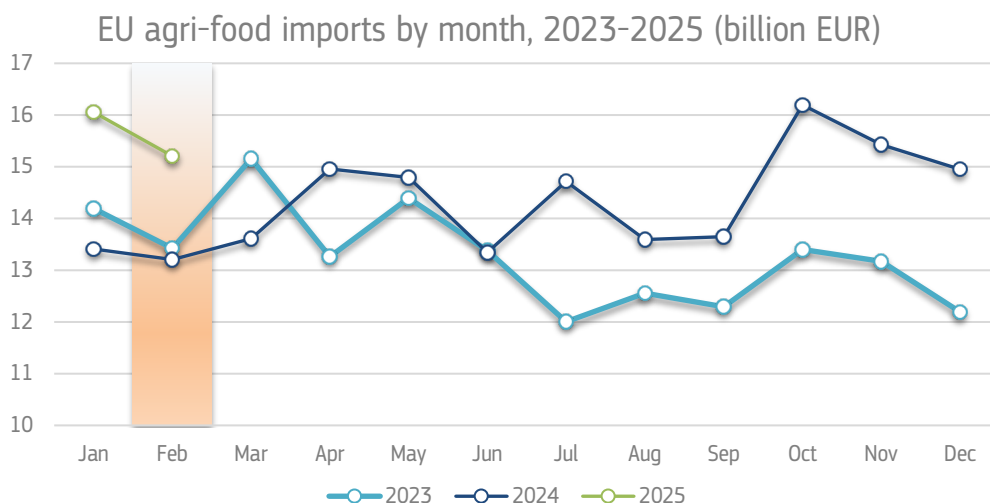
Imports of **coffee, tea, cocoa and spices** increased by EUR 2.5 billion (+59 %) in the first two months of 2025 compared to 2024. This is explained by the continuous high prices of cocoa and coffee.

Imports of **fruit and nuts** also grew by EUR 772 million (+20 %), mainly due to increased prices (+16 %) and higher imported volumes of grapes, nuts and bananas.

Imports of **non-edible products** also increased by EUR 283 million (+20 %), due to both higher prices and volumes.

On the other hand, imports of **oilseeds and protein crops** declined by EUR 245 million (-7 %), mainly due to lower prices while volumes remained overall stable.

Imports of **sugar and isoglucose** decreased by EUR 162 million (-46 %). This is mainly explained by reduced imported volumes. Imports of **olives and olive oil** decreased by EUR 99 million (-31 %) due to both lower import prices and volumes.



**TABLE 1**

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

	yearly data			monthly data			
TRADING PARTNERS	2023	2024	Share 2024	Jan24-Feb24	Jan25-Feb25	Difference	
<b>TOTAL AGRIFOOD</b>	<b>228 794</b>	<b>235 258</b>	<b>100%</b>	<b>37 673</b>	<b>38 657</b>	<b>984</b>	<b>3%</b>
United States	27 192	30 516	13%	4 592	5 005	413	9%
United Kingdom	51 744	53 939	23%	8 471	8 793	322	4%
Switzerland	11 597	12 271	5%	1 961	2 204	243	12%
Türkiye	4 871	5 165	2%	915	1 049	134	15%
Israel	2 773	2 903	1%	481	589	107	22%
Pakistan	442	383	0%	105	51	- 54	-51%
Singapore	2 369	2 034	1%	321	259	- 62	-19%
Japan	7 876	8 236	4%	1 410	1 332	- 78	-6%
Saudi Arabia	4 646	4 622	2%	859	768	- 91	-11%
China	14 603	13 242	6%	2 246	1 916	- 330	-15%
Other countries	100 681	101 947	43%	16 310	16 692	382	2%

**TABLE 2**

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

	yearly data			monthly data			
TRADING PARTNERS	2023	2024	Share 2024	Jan24-Feb24	Jan25-Feb25	Difference	
<b>TOTAL AGRIFOOD</b>	<b>228 794</b>	<b>235 258</b>	<b>100%</b>	<b>37 673</b>	<b>38 657</b>	<b>984</b>	<b>3%</b>
United Kingdom	51 744	53 939	23%	8 471	8 793	322	4%
United States	27 192	30 516	13%	4 592	5 005	413	9%
Switzerland	11 597	12 271	5%	1 961	2 204	243	12%
China	14 603	13 242	6%	2 246	1 916	- 330	-15%
Japan	7 876	8 236	4%	1 410	1 332	- 78	-6%
Norway	5 944	6 036	3%	1 009	1 093	84	8%
Türkiye	4 871	5 165	2%	915	1 049	134	15%
Russian Federation	6 763	6 014	3%	1 029	978	- 51	-5%
Saudi Arabia	4 646	4 622	2%	859	768	- 91	-11%
Canada	4 469	4 809	2%	693	744	51	7%
Korea, Republic of	4 542	4 271	2%	725	706	- 19	-3%
Ukraine	3 461	3 634	2%	618	694	76	12%
Morocco	3 831	3 605	2%	684	678	- 6	-1%
Australia	3 769	4 169	2%	647	628	- 19	-3%
Israel	2 773	2 903	1%	481	589	107	22%
Other countries	70 714	71 824	31%	11 332	11 481	149	1%

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-Feb24	Jan25-Feb25	Difference	
<b>TOTAL AGRIFOOD</b>	<b>228 794</b>	<b>235 258</b>	<b>100%</b>	<b>37 673</b>	<b>38 657</b>	<b>984</b>	<b>3%</b>
Coffee, tea, cocoa and spices	8 137	10 726	5%	1 469	2 227	758	52%
Confectionery and chocolate	10 764	11 806	5%	1 691	2 020	329	19%
Dairy products	19 580	19 665	8%	3 024	3 182	158	5%
Cereal preparations and milling products	24 305	24 758	11%	3 873	4 011	138	4%
Mixed food preparations and ingredients	14 427	15 602	7%	2 455	2 561	106	4%
Vegetable oils (oilseeds and palm)	3 534	2 604	1%	441	385	- 56	-13%
Non-edible for technical use	4 447	4 587	2%	833	737	- 96	-12%
Olives and olive oil	5 111	7 199	3%	1 197	1 064	- 133	-11%
Preparations of fruit, nuts and vegetables	12 379	12 893	5%	2 172	2 033	- 139	-6%
Cereals	14 611	11 720	5%	2 549	1 782	- 767	-30%
Other products	111 499	113 697	48%	17 969	18 655	686	4%

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-Feb24	Jan25-Feb25	Difference	
<b>TOTAL AGRIFOOD</b>	<b>228 794</b>	<b>235 258</b>	<b>100%</b>	<b>37 673</b>	<b>38 657</b>	<b>984</b>	<b>3%</b>
Cereal preparations and milling products	24 305	24 758	11%	3 873	4 011	138	4%
Dairy products	19 580	19 665	8%	3 024	3 182	158	5%
Mixed food preparations and ingredients	14 427	15 602	7%	2 455	2 561	106	4%
Wine and wine based products	17 606	17 384	7%	2 420	2 414	- 6	0%
Coffee, tea, cocoa and spices	8 137	10 726	5%	1 469	2 227	758	52%
Pigmeat	12 269	12 365	5%	2 031	2 068	37	2%
Preparations of fruit, nuts and vegetables	12 379	12 893	5%	2 172	2 033	- 139	-6%
Confectionery and chocolate	10 764	11 806	5%	1 691	2 020	329	19%
Cereals	14 611	11 720	5%	2 549	1 782	- 767	-30%
Vegetables	8 802	9 280	4%	1 683	1 779	96	6%
Beer, cider and other beverages	10 781	10 882	5%	1 700	1 673	- 27	-2%
Pet food and forage crops	8 306	8 460	4%	1 400	1 459	58	4%
Tobacco, cigars and cigarettes	7 026	7 770	3%	1 298	1 373	75	6%
Other animal products	8 324	8 285	4%	1 206	1 250	44	4%
Spirits and liqueurs	9 069	8 805	4%	1 191	1 183	- 8	-1%
Other products	42 410	44 857	19%	7 511	7 643	132	2%

TABLE 5

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

TRADING PARTNERS	yearly data			monthly data			
	2023	2024	Share 2024	Jan24-Feb24	Jan25-Feb25	Difference	
<b>TOTAL AGRIFOOD</b>	<b>159 430</b>	<b>171 861</b>	<b>100%</b>	<b>26 617</b>	<b>31 263</b>	<b>4 646</b>	<b>17%</b>
Côte d'Ivoire	4 055	6 760	4%	999	1 732	733	73%
China	8 347	9 155	5%	1 386	1 833	447	32%
Canada	2 844	2 540	1%	431	776	344	80%
Australia	2 580	1 857	1%	221	551	330	149%
United States	11 683	11 953	7%	2 273	2 601	329	14%
Paraguay	374	323	0%	86	39	- 47	-55%
Moldova, Republic of	891	989	1%	168	118	- 50	-30%
Egypt	1 943	2 307	1%	401	334	- 68	-17%
Russian Federation	1 892	1 027	1%	269	63	- 207	-77%
Ukraine	11 839	13 094	8%	2 476	2 239	- 237	-10%
Other countries	112 982	121 857	71%	17 907	20 979	3 071	17%

TABLE 6

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

TRADING PARTNERS	yearly data			monthly data			
	2023	2024	Share 2024	Jan24-Feb24	Jan25-Feb25	Difference	
<b>TOTAL AGRIFOOD</b>	<b>159 430</b>	<b>171 861</b>	<b>100%</b>	<b>26 617</b>	<b>31 263</b>	<b>4 646</b>	<b>17%</b>
United States	11 683	11 953	7%	2 273	2 601	329	14%
Brazil	17 215	17 425	10%	2 378	2 476	98	4%
United Kingdom	15 517	15 393	9%	2 357	2 450	93	4%
Ukraine	11 839	13 094	8%	2 476	2 239	- 237	-10%
China	8 347	9 155	5%	1 386	1 833	447	32%
Côte d'Ivoire	4 055	6 760	4%	999	1 732	733	73%
Türkiye	6 627	7 314	4%	1 300	1 389	88	7%
Argentina	4 663	5 558	3%	633	864	231	36%
Switzerland	4 859	5 048	3%	782	835	53	7%
Morocco	3 182	3 447	2%	787	818	31	4%
Canada	2 844	2 540	1%	431	776	344	80%
Indonesia	5 474	5 249	3%	702	682	- 20	-3%
Viet Nam	3 216	3 836	2%	560	682	122	22%
India	3 302	3 975	2%	442	640	199	45%
Peru	3 089	3 767	2%	498	632	134	27%
Other countries	53 518	57 348	33%	8 614	10 615	2 001	23%



TABLE 7

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

AGRI-FOOD CATEGORIES	2023	2024	Share 2024	Jan24-Feb24	Jan25-Feb25	Difference	
<b>TOTAL AGRIFOOD</b>	<b>159 430</b>	<b>171 861</b>	<b>100%</b>	<b>26 617</b>	<b>31 263</b>	<b>4 646</b>	<b>17%</b>
Coffee, tea, cocoa and spices	20 564	30 326	18%	4 183	6 660	2 477	59%
Fruit and nuts	22 336	24 925	15%	3 831	4 603	772	20%
Non-edible for technical use	9 393	9 625	6%	1 390	1 672	283	20%
Cereals	11 691	9 732	6%	1 658	1 829	170	10%
Tobacco, cigars and cigarettes	4 734	5 096	3%	810	978	169	21%
Wine and wine based products	1 606	1 543	1%	225	228	2	1%
Pigmeat	407	362	0%	59	58	- 1	-2%
Olives and olive oil	1 226	1 755	1%	325	225	- 99	-31%
Sugar and isoglucose	2 797	1 742	1%	354	193	- 162	-46%
Oilseeds and protein crops	21 141	20 040	12%	3 426	3 180	- 245	-7%
Other products	63 534	66 713	39%	10 357	11 637	1 281	12%

TABLE 8

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

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	2023	2024	Share 2024	Jan24- Feb24	Jan25- Feb25	Difference	
TOTAL AGRIFOOD	159 430	171 861	100%	26 617	31 263	4 646	17%
Coffee, tea, cocoa and spices	20 564	30 326	18%	4 183	6 660	2 477	59%
Fruit and nuts	22 336	24 925	15%	3 831	4 603	772	20%
Oilseeds and protein crops	21 141	20 040	12%	3 426	3 180	- 245	-7%
Cereals	11 691	9 732	6%	1 658	1 829	170	10%
Non-edible for technical use	9 393	9 625	6%	1 390	1 672	283	20%
Preparations of fruit, nuts and vegetables	6 730	7 589	4%	1 207	1 322	114	9%
Vegetables	5 860	6 171	4%	1 218	1 229	11	1%
Vegetable oils (oilseeds and palm)	7 708	7 587	4%	1 116	1 183	66	6%
Mixed food preparations and ingredients	5 958	6 538	4%	1 004	1 086	82	8%
Tobacco, cigars and cigarettes	4 734	5 096	3%	810	978	169	21%
Other animal products	5 416	5 074	3%	812	932	120	15%
Cereal preparations and milling products	4 811	5 221	3%	802	894	92	12%
Margarine and other oils and fats (vegetable	3 908	4 169	2%	580	685	105	18%
Spirits and liqueurs	4 517	4 386	3%	562	638	76	13%
Pet food and forage crops	3 146	3 410	2%	548	570	22	4%
Other products	21 517	21 970	13%	3 471	3 803	332	10%

**TABLE 9**

EU AGRI-FOOD TRADE BALANCE (million EUR)

	EXPORTS	IMPORTS	TRADE BALANCE		
AGRI-FOOD CATEGORIES/PERIOD	Jan25-Feb25	Jan24-Feb24	Jan25-Feb25	Difference	
	million EUR				
<b>TOTAL Agrifood</b>	<b>38 657</b>	<b>31 263</b>	<b>11 056</b>	<b>7 393</b>	<b>-3 662</b>
Cereal preparations and milling products	4 011	894	3 071	3 117	46
Dairy products	3 182	422	2 677	2 760	83
Wine and wine based products	2 414	228	2 194	2 186	- 8
Pigmeat	2 068	58	1 972	2 010	38
Mixed food preparations and ingredients	2 561	1 086	1 452	1 475	23
Confectionery and chocolate	2 020	558	1 265	1 461	197
Beer, cider and other beverages	1 673	350	1 371	1 322	- 49
Pet food and forage crops	1 459	570	853	889	36
Olives and olive oil	1 064	225	872	839	- 33
Preparations of fruit, nuts and vegetables	2 033	1 322	965	711	- 253
Vegetables	1 779	1 229	465	551	85
Spirits and liqueurs	1 183	638	628	545	- 83
Poultry and eggs	1 011	493	598	518	- 80
Horticulture	902	460	430	442	12
Tobacco, cigars and cigarettes	1 373	978	489	394	- 94
Beef and veal	817	467	338	349	12
Other animal products	1 250	932	394	318	- 76
Sugar and isoglucose	396	193	18	204	186
Unspecified	187	129	134	58	- 76
Cereals	1 782	1 829	891	- 47	- 938
Sheep and goat	141	219	- 75	- 78	- 3
Margarine and other oils and fats (vegetable)	383	685	- 226	- 301	- 76
Vegetable oils (oilseeds and palm)	385	1 183	- 675	- 797	- 122
Non-edible for technical use	737	1 672	- 556	- 935	- 379
Oilseeds and protein crops	498	3 180	-2 982	-2 683	299
Fruit and nuts	1 121	4 603	-2 791	-3 482	- 690
Coffee, tea, cocoa and spices	2 227	6 660	-2 714	-4 433	-1 720
<i>For info: fish and fish products</i>	<i>1 302</i>	<i>5 134</i>	<i>-3 446</i>	<i>-3 832</i>	<i>- 386</i>
<i>Total agrifood and fish</i>	<i>39 958</i>	<i>36 397</i>	<i>7 609</i>	<i>3 561</i>	<i>-4 048</i>

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