



# MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS in March 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 March 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).

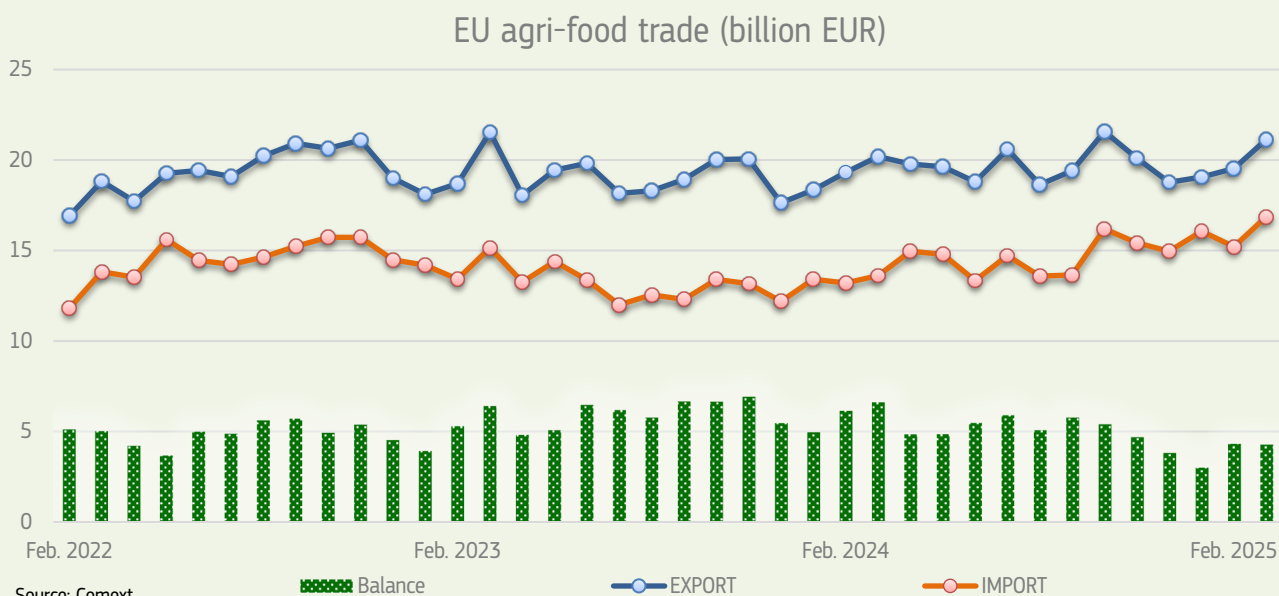


# HIGHLIGHTS: EU trade remained strong in the first quarter 2025, but surplus fell due to high import prices

EU exports reached EUR 21.1 billion in March 2025, an increase of 8 % on the previous month and 5 % higher than in March 2024. Over the first quarter of the year, EU exports reached EUR 59.7 billion, this is 3 % higher than in the same period in 2024. Prices for exports of cocoa based products remained high, while exports of cereals declined.

EU imports increased by 11 % month-on-month in March, reaching EUR 16.9 billion, a 24 % increase on March 2024. Between January and March, cumulative imports reached EUR 48.1 billion, up 20 % on the first quarter of 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 remained stable in March compared to the previous month and reached EUR 4.3 billion. Over the first quarter of the year, the EU surplus reached EUR 11.6 billion. This is a reduction of EUR 6.1 billion compared to the first quarter 2024, primarily due to increases in prices of EU imports.



# EU AGRI-FOOD EXPORTS

## UK, US AND SWITZERLAND WERE THE TOP EU EXPORT DESTINATIONS IN THE BEGINNING OF 2025

**EU agri-food exports reached EUR 21.1 billion in March 2025**, an 8 % increase on the previous month and 5 % higher than in March 2024. In the first quarter of the year, EU exports reached EUR 59.7 billion, an increase of 3 % (+ EUR 1.9 billion) compared to the same period in 2024.

The **UK** remained the first destination of EU exports, with EUR 13.5 billion in the first quarter of 2025 (23 % of EU agri-food exports). This is an increase of EUR 583 million (+5 %) compared to the same period in 2024, mainly due to increased prices of cocoa based products.

The **US** remained the second destination of EU exports, with EUR 7.9 billion in the first quarter of the year (13 % of EU exports). This is an increase of EUR 752 million (+11 %) compared to 2024, partly explained by an increase in the value of cocoa based products, as well as wine and spirits.

**Switzerland** was the third destination of EU exports between January and March, with EU exports reaching EUR 3.4 billion (6 % of EU exports). Exports grew by EUR 373 million (+12 %) compared to 2024 (mainly due to the high prices of cocoa products).

On the other hand, **China** fell behind Switzerland and was the fourth destination of EU exports in the first quarter, with exports reaching EUR 3.1 billion (5 % of EU exports). This is explained by a reduction in EU exports of EUR 437 million (-12 %)

in the first quarter compared to 2024, due to a strong reduction in the volume of cereals exports (-2.3 million t, -99 %).

## EXPORTS OF CEREALS HAVE DECLINED COMPARED TO 2024

Exports in the **coffee, tea, cocoa and spices** category had the largest increase in value, with a rise of EUR 1.1 billion (+51 %) in the first quarter of 2025 compared to 2024. This was mainly driven by a more than twofold price increase for cocoa paste, butter and powder exports.

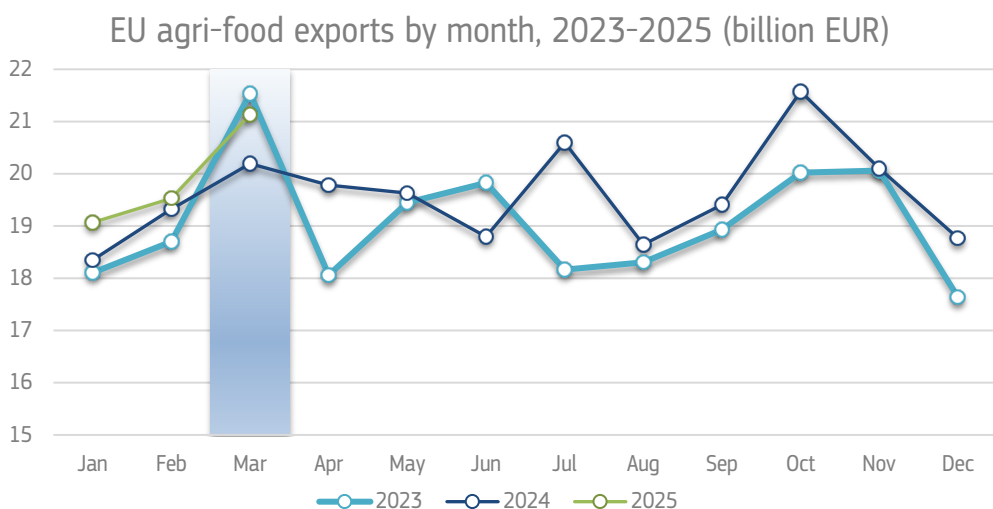
Exports of **confectionery and chocolate** also increased by EUR 539 million (+21 %), mainly due to the high prices of chocolate exports.

Exports of **dairy products** increased by EUR 327 million (+7 %), primarily due to increases in prices.

By contrast, EU **cereals** exports decreased by EUR 1 billion (-27 %) in the first quarter of 2025 compared to 2024. This is mainly explained by reductions in exported volumes, for both wheat (-40 %, -4.1 million t) and maize (-39 %, -0.5 million t), while prices increased.

Exports of **olives and olive oil** decreased by EUR 173 million (-9 %) compared to 2024, as prices have eased up after their peak in 2024, but volumes exported increased by 16 %.

Exports of **preparations of fruit, nuts and vegetables** decreased by EUR 142 million (-4 %), due to reduced volumes.



# EU AGRI-FOOD IMPORTS

## BRAZIL, US AND UK TOPPED EU IMPORT SOURCES IN FIRST QUARTER

The value of EU agri-food imports reached **EUR 16.9 billion in March 2025**. This is 11 % higher than the previous month and 24 % higher than in March 2024. Over the first quarter of the year, EU imports reached EUR 48.1 billion. This is an increase of EUR 7.9 billion (+20 %) compared to 2024, mainly explained by high prices for several EU imports, particularly cocoa and coffee.

**Brazil** remained the top origin of EU imports in the first quarter, as they reached EUR 4 billion (8 % of EU imports), with an increase of EUR 359 million (+10%) compared to the same period in 2024, mainly due to high coffee prices.

The **US** followed closely behind as the second source of EU imports in the first quarter, just below EUR 4 billion. Imports from the US increased by EUR 684 million (+21 %), mainly due to a significant increase maize imports that reached 1.9 million t in the first quarter.

The **UK** was the third origin of EU imports, with EUR 3.8 billion in the first quarter, an increase of EUR 145 million (+4 %) compared to the same period in 2024.

Among other significant developments, imports from **Côte d'Ivoire** saw the largest increase in value compared to 2024 (+ EUR 1.2 billion, +84 %) and reached EUR 2.6 billion, mainly due to high cocoa prices. Imports from **China** increased by EUR 732 million (+35 %) and reached EUR 2.8 billion, due to increases across most product categories, notably non-edible products (including fatty acids and waxes).

Imports from **Canada** increased by EUR 532 million (+88 %), mainly due to large increases for cereals and oilseeds. Imports from **Australia** increased by EUR 508 million (+149 %), mainly due to a strong increase in rapeseed imports.

By contrast, imports from **Russia** decreased by 78 % (- EUR 336 million) in the first quarter compared to 2024, largely due to a sharp reduction in imports of oilseeds and cereals.

Imports from **Ukraine** decreased by EUR 128 million (-4 %), reaching EUR 3.4 billion and falling back to the fourth source of EU imports. This was mainly due to lower imports of cereals (-1.4 million t, notably maize and wheat) and oilseeds (rapeseed).

## HIGH PRICES KEEP DRIVING EU IMPORTS

Imports of **coffee, tea, cocoa and spices** increased by EUR 4.2 billion (+69 %) in the first quarter of 2025 compared to 2024. This is mainly explained by higher import prices: cocoa prices doubled, and coffee prices rose by 65 %. Imports of **fruit and nuts** also grew by EUR 1.1 billion (+18 %), mainly due to higher prices (+15 %). Imports of **non-edible products** increased by EUR 457 million (+21 %), mainly due to higher prices. Imports of **cereals** increased by EUR 434 million (+18 %), mainly due to increased volumes of maize (+28 %), while those of wheat declined.

By contrast, imports of **sugar and isoglucose** decreased by EUR 197 million (-39 %), mainly due to reduced volumes. Imports of **olives and olive oil** decreased by EUR 167 million (-32 %) due to both lower import prices and volumes.

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

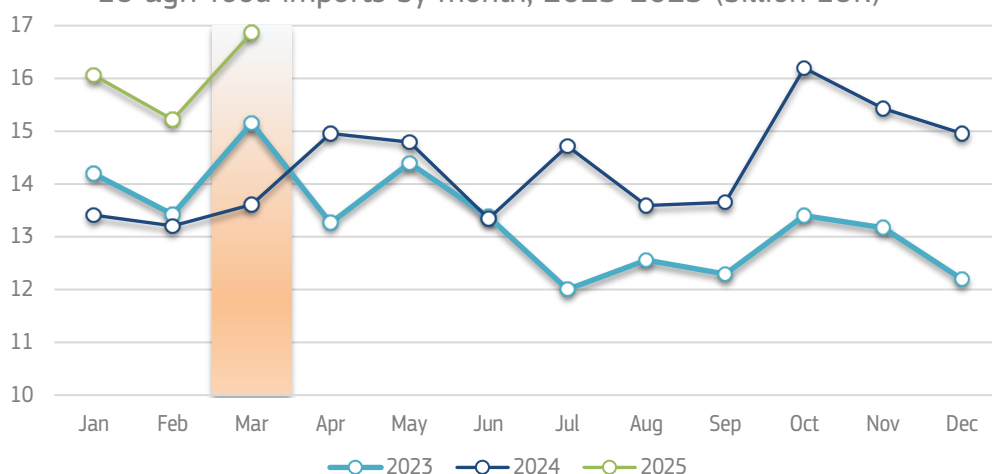


TABLE 1

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

	yearly data			monthly data			
TRADING PARTNERS	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan24- Mar24	Jan25- Mar25	Difference	
TOTAL AGRIFOOD	228 794	235 167	100%	57 867	59 730	1 863	3%
United States	27 192	30 459	13%	7 102	7 854	752	11%
United Kingdom	51 744	53 930	23%	12 907	13 490	583	5%
Switzerland	11 597	12 270	5%	3 038	3 411	373	12%
Türkiye	4 871	5 165	2%	1 363	1 613	250	18%
Norway	5 944	6 036	3%	1 494	1 682	188	13%
Iraq	964	1 047	0%	311	226	- 85	-27%
Brazil	2 574	2 812	1%	737	648	- 89	-12%
Saudi Arabia	4 646	4 622	2%	1 285	1 188	- 97	-8%
Russian Federation	6 763	6 014	3%	1 568	1 459	- 110	-7%
China	14 603	13 241	6%	3 534	3 096	- 437	-12%
Other countries	97 896	99 570	42%	24 528	25 062	534	2%

TABLE 2

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

	yearly data			monthly data			
TRADING PARTNERS	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan24- Mar24	Jan25- Mar25	Difference	
TOTAL AGRIFOOD	228 794	235 167	100%	57 867	59 730	1 863	3%
United Kingdom	51 744	53 930	23%	12 907	13 490	583	5%
United States	27 192	30 459	13%	7 102	7 854	752	11%
Switzerland	11 597	12 270	5%	3 038	3 411	373	12%
China	14 603	13 241	6%	3 534	3 096	- 437	-12%
Japan	7 876	8 236	4%	2 094	2 047	- 47	-2%
Norway	5 944	6 036	3%	1 494	1 682	188	13%
Türkiye	4 871	5 165	2%	1 363	1 613	250	18%
Russian Federation	6 763	6 014	3%	1 568	1 459	- 110	-7%
Saudi Arabia	4 646	4 622	2%	1 285	1 188	- 97	-8%
Canada	4 469	4 809	2%	1 078	1 165	87	8%
Korea, Republic of	4 542	4 271	2%	1 108	1 093	- 15	-1%
Morocco	3 831	3 601	2%	992	1 065	73	7%
Ukraine	3 461	3 634	2%	926	1 060	134	14%
Australia	3 769	4 169	2%	973	957	- 16	-2%
Israel	2 773	2 903	1%	736	887	151	21%
Other countries	70 714	71 807	31%	17 668	17 662	- 6	0%

TABLE 3

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

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan24- Mar24	Jan25- Mar25	Difference	
TOTAL AGRIFOOD	228 794	235 167	100%	57 867	59 730	1 863	3%
Coffee, tea, cocoa and spices	8 137	10 725	5%	2 242	3 377	1 135	51%
Confectionery and chocolate	10 764	11 804	5%	2 537	3 076	539	21%
Dairy products	19 580	19 646	8%	4 617	4 944	327	7%
Cereal preparations and milling products	24 305	24 755	11%	5 935	6 165	230	4%
Tobacco, cigars and cigarettes	7 026	7 770	3%	1 911	2 117	207	11%
Oilseeds and protein crops	2 507	2 117	1%	693	646	- 47	-7%
Non-edible for technical use	4 447	4 587	2%	1 289	1 161	- 128	-10%
Preparations of fruit, nuts and vegetables	12 379	12 893	5%	3 274	3 132	- 142	-4%
Olives and olive oil	5 111	7 199	3%	1 830	1 656	- 173	-9%
Cereals	14 611	11 720	5%	3 780	2 771	-1 009	-27%
Other products	119 927	121 951	52%	29 758	30 683	925	3%

TABLE 4

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

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan24- Mar24	Jan25- Mar25	Difference	
TOTAL AGRIFOOD	228 794	235 167	100%	57 867	59 730	1 863	3%
Cereal preparations and milling products	24 305	24 755	11%	5 935	6 165	230	4%
Dairy products	19 580	19 646	8%	4 617	4 944	327	7%
Mixed food preparations and ingredients	14 427	15 601	7%	3 777	3 957	180	5%
Wine and wine based products	17 606	17 383	7%	3 883	3 886	3	0%
Coffee, tea, cocoa and spices	8 137	10 725	5%	2 242	3 377	1 135	51%
Pigmeat	12 269	12 366	5%	3 054	3 136	82	3%
Preparations of fruit, nuts and vegetables	12 379	12 893	5%	3 274	3 132	- 142	-4%
Confectionery and chocolate	10 764	11 804	5%	2 537	3 076	539	21%
Cereals	14 611	11 720	5%	3 780	2 771	- 1 009	-27%
Vegetables	8 802	9 280	4%	2 514	2 652	138	5%
Beer, cider and other beverages	10 781	10 882	5%	2 603	2 572	- 31	-1%
Pet food and forage crops	8 306	8 462	4%	2 130	2 230	100	5%
Tobacco, cigars and cigarettes	7 026	7 770	3%	1 911	2 117	207	11%
Spirits and liqueurs	9 069	8 754	4%	1 967	1 997	30	2%
Other animal products	8 324	8 277	4%	1 978	1 973	- 5	0%
Other products	42 410	44 849	19%	11 664	11 744	80	1%



TABLE 5

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

TRADING PARTNERS	yearly data			monthly data			
	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan24- Mar24	Jan25- Mar25	Difference	
<b>TOTAL AGRIFOOD</b>	<b>159 430</b>	<b>171 869</b>	<b>100%</b>	<b>40 228</b>	<b>48 147</b>	<b>7 919</b>	<b>20%</b>
Côte d'Ivoire	4 055	6 760	4%	1 403	2 588	1 185	84%
China	8 347	9 155	5%	2 066	2 798	732	35%
United States	11 683	11 953	7%	3 268	3 952	684	21%
Canada	2 844	2 540	1%	601	1 134	532	88%
Australia	2 580	1 857	1%	340	848	508	149%
Papua New Guinea	520	484	0%	117	66	- 51	-44%
Moldova, Republic of	891	989	1%	250	188	- 62	-25%
Egypt	1 943	2 307	1%	651	587	- 64	-10%
Ukraine	11 839	13 094	8%	3 486	3 358	- 128	-4%
Russian Federation	1 892	1 026	1%	430	94	- 336	-78%
Other countries	112 836	121 704	71%	27 618	32 536	4 918	18%

TABLE 6

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

TRADING PARTNERS	yearly data			monthly data			
	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan24- Mar24	Jan25- Mar25	Difference	
<b>TOTAL AGRIFOOD</b>	<b>159 430</b>	<b>171 869</b>	<b>100%</b>	<b>40 228</b>	<b>48 147</b>	<b>7 919</b>	<b>20%</b>
Brazil	17 215	17 425	10%	3 665	4 023	359	10%
United States	11 683	11 953	7%	3 268	3 952	684	21%
United Kingdom	15 517	15 392	9%	3 654	3 799	145	4%
Ukraine	11 839	13 094	8%	3 486	3 358	- 128	-4%
China	8 347	9 155	5%	2 066	2 798	732	35%
Côte d'Ivoire	4 055	6 760	4%	1 403	2 588	1 185	84%
Türkiye	6 627	7 314	4%	1 871	2 044	173	9%
Morocco	3 182	3 447	2%	1 148	1 287	139	12%
Switzerland	4 859	5 048	3%	1 208	1 249	41	3%
Argentina	4 663	5 558	3%	977	1 193	216	22%
Viet Nam	3 216	3 836	2%	908	1 135	228	25%
Canada	2 844	2 540	1%	601	1 134	532	88%
Indonesia	5 474	5 249	3%	1 116	1 076	- 39	-4%
India	3 302	3 975	2%	761	1 059	297	39%
Peru	3 089	3 767	2%	782	904	122	16%
Other countries	53 518	57 357	33%	13 316	16 549	3 233	24%



TABLE 7

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

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan24- Mar24	Jan25- Mar25	Difference	
TOTAL AGRIFOOD	159 430	171 869	100%	40 228	48 147	7 919	20%
Coffee, tea, cocoa and spices	20 564	30 327	18%	6 088	10 266	4 178	69%
Fruit and nuts	22 336	24 925	15%	5 944	7 020	1 076	18%
Non-edible for technical use	9 393	9 630	6%	2 186	2 643	457	21%
Cereals	11 691	9 732	6%	2 425	2 859	434	18%
Tobacco, cigars and cigarettes	4 734	5 096	3%	1 237	1 563	326	26%
Pigmeat	407	362	0%	93	87	- 6	-6%
Wine and wine based products	1 606	1 543	1%	351	330	- 21	-6%
Oilseeds and protein crops	21 141	20 040	12%	4 934	4 799	- 134	-3%
Olives and olive oil	1 226	1 755	1%	526	359	- 167	-32%
Sugar and isoglucose	2 797	1 742	1%	504	307	- 197	-39%
Other products	63 534	66 717	39%	15 942	17 913	1 972	12%

TABLE 8

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

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan24- Mar24	Jan25- Mar25	Difference	
TOTAL AGRIFOOD	159 430	171 869	100%	40 228	48 147	7 919	20%
Coffee, tea, cocoa and spices	20 564	30 327	18%	6 088	10 266	4 178	69%
Fruit and nuts	22 336	24 925	15%	5 944	7 020	1 076	18%
Oilseeds and protein crops	21 141	20 040	12%	4 934	4 799	- 134	-3%
Cereals	11 691	9 732	6%	2 425	2 859	434	18%
Non-edible for technical use	9 393	9 630	6%	2 186	2 643	457	21%
Vegetables	5 860	6 171	4%	1 904	1 989	85	4%
Preparations of fruit, nuts and vegetables	6 730	7 589	4%	1 762	1 938	176	10%
Vegetable oils (oilseeds and palm)	7 708	7 587	4%	1 784	1 826	42	2%
Mixed food preparations and ingredients	5 958	6 539	4%	1 551	1 654	103	7%
Tobacco, cigars and cigarettes	4 734	5 096	3%	1 237	1 563	326	26%
Other animal products	5 416	5 074	3%	1 221	1 390	170	14%
Cereal preparations and milling products	4 811	5 221	3%	1 224	1 364	140	11%
Margarine and other oils and fats (vegetable	3 908	4 174	2%	913	1 087	173	19%
Spirits and liqueurs	4 517	4 386	3%	879	994	115	13%
Pet food and forage crops	3 146	3 409	2%	837	856	19	2%
Other products	21 517	21 969	13%	5 341	5 899	558	10%

**TABLE 9**

EU AGRI-FOOD TRADE BALANCE (million EUR)

	EXPORTS	IMPORTS	TRADE BALANCE		
AGRI-FOOD CATEGORIES/PERIOD	Jan25-Mar25	Jan24-Mar24	Jan25-Mar25	Difference	
	million EUR				
<b>Total Agrifood</b>	<b>59 730</b>	<b>48 147</b>	<b>17 638</b>	<b>11 582</b>	<b>-6 056</b>
Cereal preparations and milling products	6 165	1 364	4 711	4 801	90
Dairy products	4 944	660	4 084	4 284	200
Wine and wine based products	3 886	330	3 532	3 555	23
Pigmeat	3 136	87	2 961	3 049	88
Mixed food preparations and ingredients	3 957	1 654	2 226	2 303	77
Confectionery and chocolate	3 076	853	1 907	2 223	316
Beer, cider and other beverages	2 572	553	2 069	2 019	- 49
Pet food and forage crops	2 230	856	1 293	1 374	81
Olives and olive oil	1 656	359	1 304	1 297	- 7
Preparations of fruit, nuts and vegetables	3 132	1 938	1 512	1 194	- 318
Spirits and liqueurs	1 997	994	1 088	1 003	- 85
Horticulture	1 457	676	742	781	39
Poultry and eggs	1 546	779	910	767	- 143
Vegetables	2 652	1 989	610	663	52
Other animal products	1 973	1 390	757	583	- 174
Tobacco, cigars and cigarettes	2 117	1 563	674	555	- 119
Beef and veal	1 233	718	597	515	- 82
Sugar and isoglucose	585	307	52	279	227
Unspecified	274	197	205	77	- 128
Cereals	2 771	2 859	1 356	- 88	-1 443
Sheep and goat	213	380	- 145	- 168	- 22
Margarine and other oils and fats (vegetable)	605	1 087	- 373	- 482	- 109
Vegetable oils (oilseeds and palm)	651	1 826	-1 116	-1 175	- 59
Non-edible for technical use	1 161	2 643	- 897	-1 482	- 585
Oilseeds and protein crops	646	4 799	-4 241	-4 154	87
Fruit and nuts	1 718	7 020	-4 334	-5 302	- 968
Coffee, tea, cocoa and spices	3 377	10 266	-3 846	-6 889	-3 042
<i>For info: fish and fish products</i>	<i>2 030</i>	<i>7 827</i>	<i>-5 181</i>	<i>-5 797</i>	<i>- 616</i>
<i>Total agrifood and fish</i>	<i>61 760</i>	<i>55 975</i>	<i>12 458</i>	<i>5 785</i>	<i>-6 672</i>

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