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NOTE

From:	General Secretariat of the Council
To:	Delegations
Subject:	Trade-related agricultural issues

DOCUMENT PARTIALLY ACCESSIBLE TO THE PUBLIC (13.05.2026)

With a view to the Council ('Agriculture and Fisheries') meeting on 30 March 2026 delegations will find background information in the annex.

ANNEX

Trade-related agricultural issues

General situation

1. The challenging geopolitical situation faced by the Union in 2025 continued into 2026 and escalated further with yet non-predictable effects on the agrifood sector and trade. The consequences for the cost of production, and the transport and distribution of food to the consumer at reasonable prices may be quite serious. At the same time, the terms of trade with major partners remain fluid, with destabilising effects on international trade and the predictability of the markets. The situation is further complicated by a deteriorating animal health environment in many parts of the Union.

2. For the EU, it is therefore crucial to maintain its existing bilateral trade relations with third states, to promote diversification and expansion of its network of FTAs, and to do everything possible at WTO level to conserve the rules-based multilateral trading system. A resilient, competitive and thriving agrifood sector in the EU itself continues to be paramount not only for food security in the Union, but for the global one too. In this respect, the close monitoring of the situation by the AGRIFISH Council remains key.

3. Close monitoring is important, perhaps more than before, in view of recent developments such as the WTO's MC14 in Cameroon, the EU-India agreement, the update of the trade framework with the US following the US supreme court ruling, the provisional application of the Mercosur agreement following its approval by the Council at the beginning of the year, and the finalisation of negotiations with Australia.

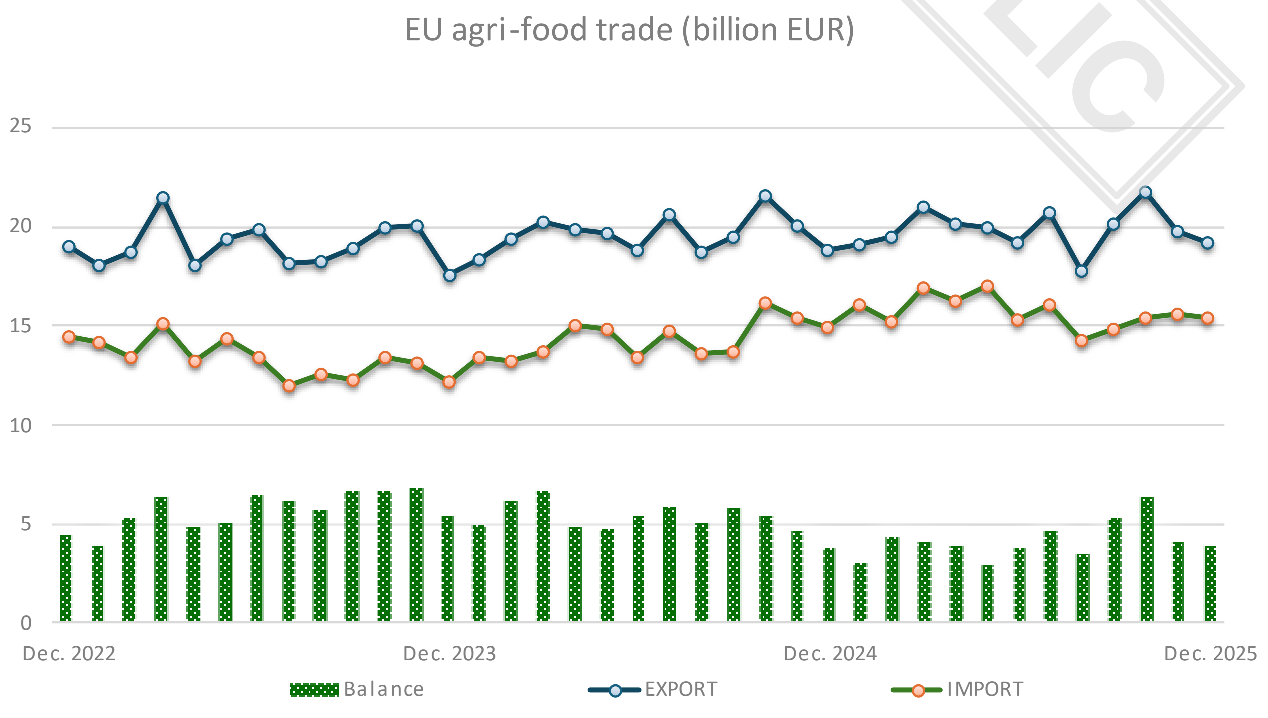
4. The continuous efforts and the reforms adopted by the Council from 2002 onwards have led the agrifood trade surplus to increase by roughly four times, with the EU becoming a net exporter for most agri-food categories. In 2025, the sector contributed to 37% of the EU's overall trade surplus underlining its importance for the EU economy.

5. As the latest statistics indicate, in 2025 EU agri-food exports reached EUR 238.4 billion, an increase of 1% compared to 2024 (+ EUR 2.8 billion). The destinations of EU exports remained diversified with an increase of exports to the UK and a reduction to the US and China. The EU also kept exporting a diversified basket of products, topped by exports of cereal preparations, dairy products and wine. Higher prices drove up the value of exports of cocoa products, coffee, chocolate and dairy products. On the contrary, volumes of wine and cereals declined and so did the value of exported olive oil because of lower prices.

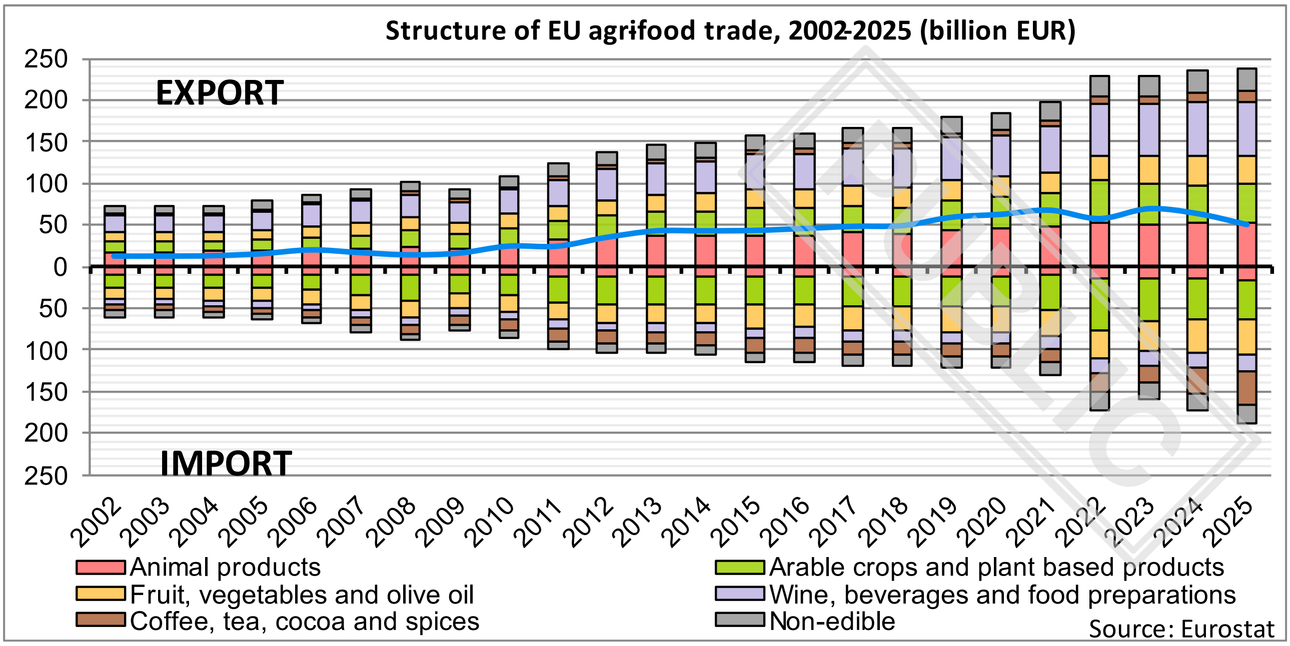
6. EU agri-food imports reached of EUR 188.6 billion in 2025, an increase of 9% compared to the previous year (+ EUR 16.2 billion). The increase was primarily driven by a steep rise in the price of imported cocoa and coffee and, to a lower extent, of fruits and nuts. Whereas cereal import declined in volume, those of oilseeds and protein crops decreased in value due to lower prices. The EU continued to import agri-food products from a diverse set of trade partners, with Brazil, the UK and the US as the top sources. Imports increased from Côte d'Ivoire and Ghana, as Sub-Saharan Africa became one of the main regions of origin of EU imports. Imports also increased from Canada, Viet Nam and the US, while there was a notable decrease in imports from the Ukraine.

7. Overall, the stronger growth in import value caused the EU agri-food trade balance to decline to EUR 49.9 billion, EUR 13.3 billion down from 2024.

8. However, agrifood trade represented 9% of EU total exports, 7.5% of EU total imports, and 37% of the EU overall trade surplus in 2025. A major share of both EU exports (61%) and imports (57%) was taken up by trade with FTA partners.



Source: Comext


Structure of EU agrifood trade, 2002-2025 (billion EUR)
EXPORT
IMPORT
250
200
150
100
50
0
50
100
150
200
250
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
Animal products
Fruit, vegetables and olive oil
Coffee, tea, cocoa and spices
Arable crops and plant based products
Wine, beverages and food preparations
Non-edible
Source: Eurostat
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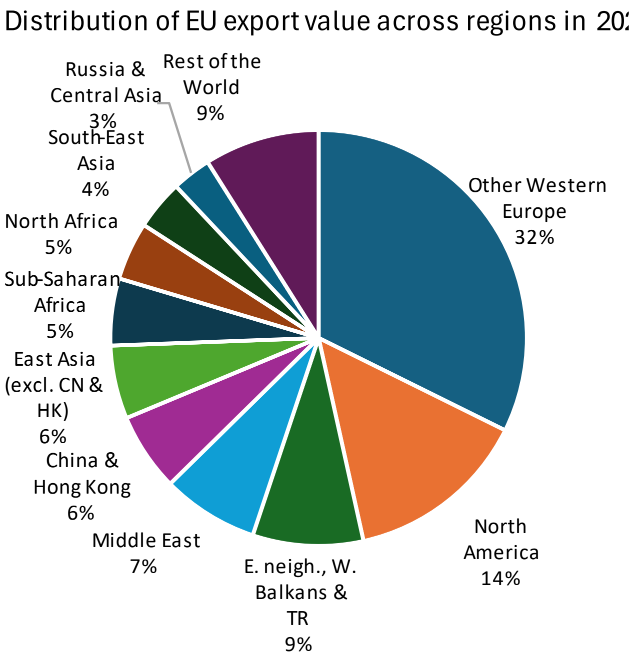
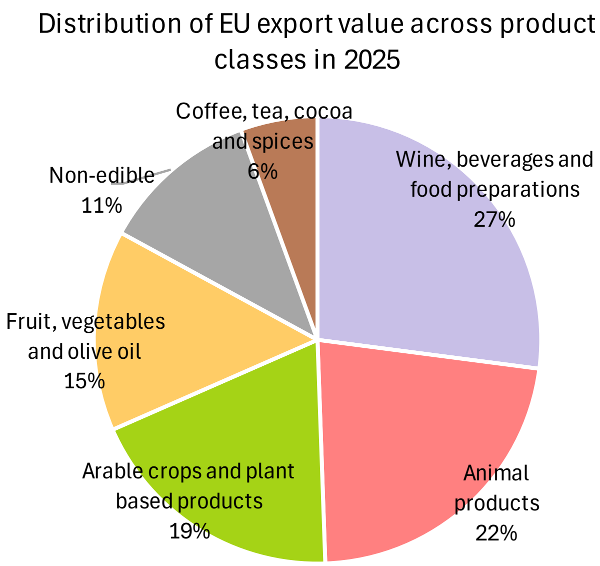
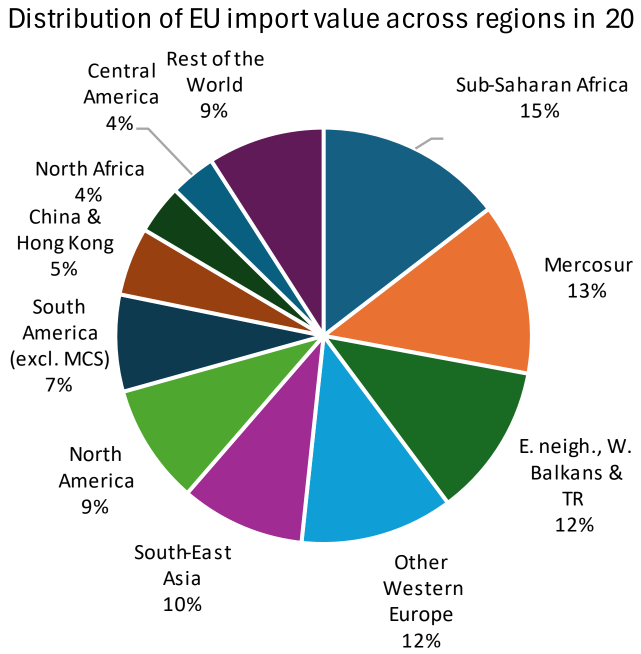
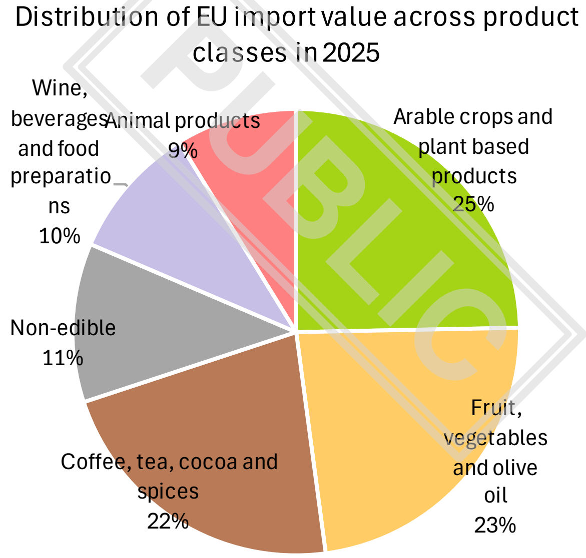
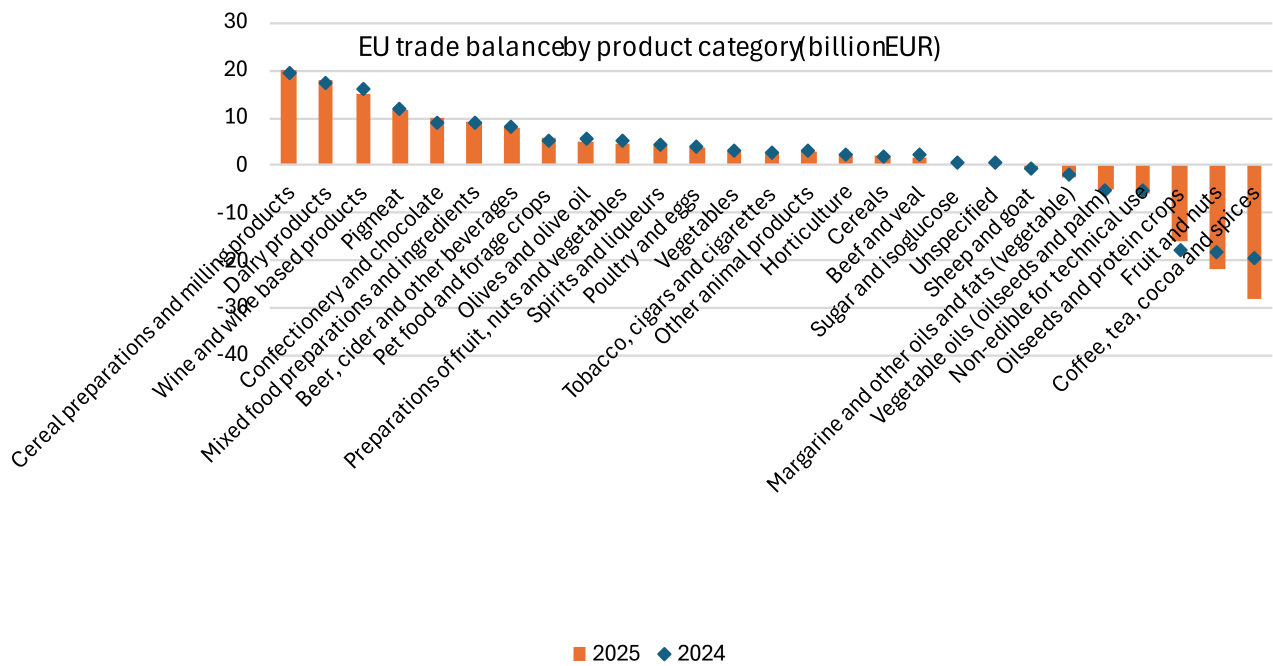
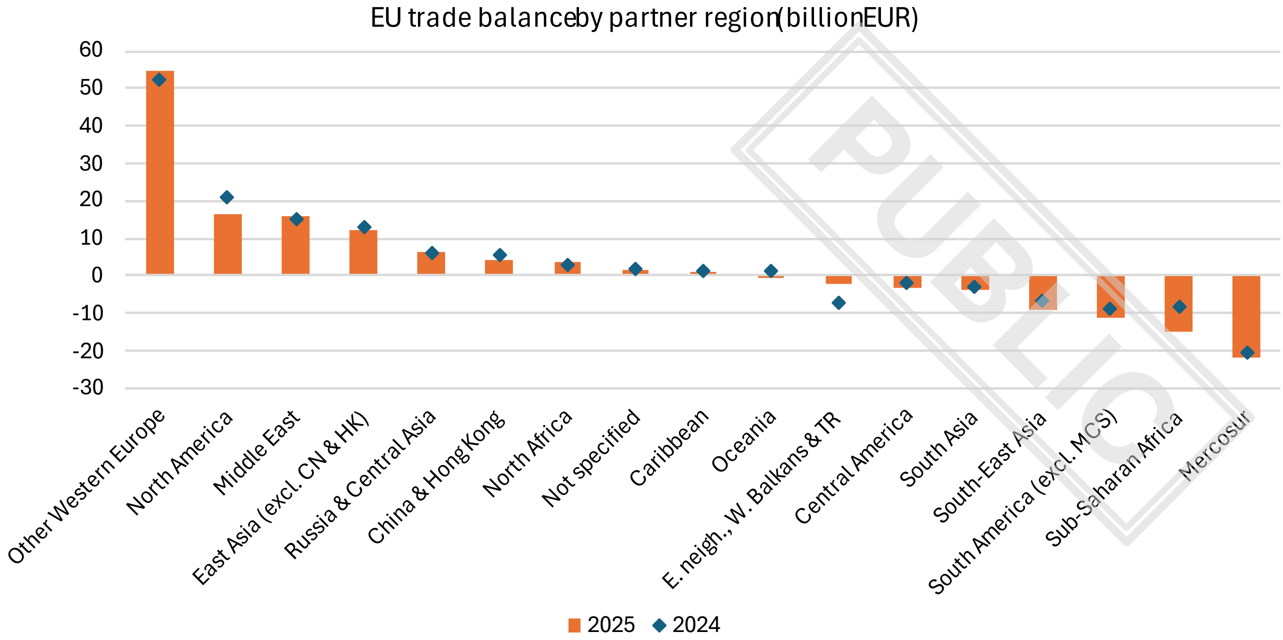

Distribution of EU export value across regions in 20:
Rest of the World 9%
Russia & Central Asia 3%
South-East Asia 4%
North Africa 5%
Sub-Saharan Africa 5%
East Asia (excl. CN & HK) 6%
China & Hong Kong 6%
Middle East 7%
E. neigh., W. Balkans & TR 9%
North America 14%
Other Western Europe 32%

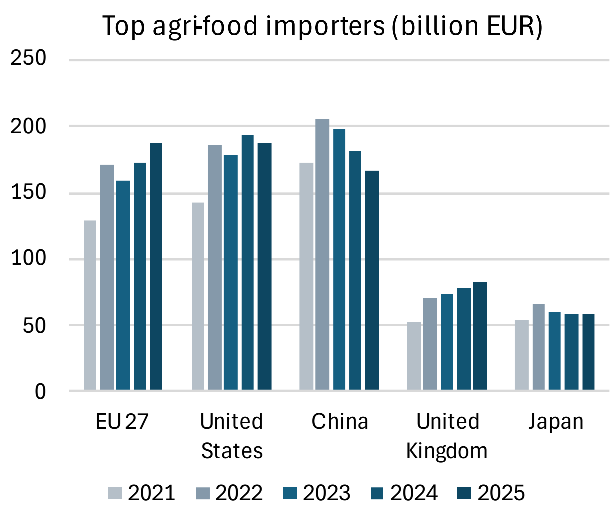

Distribution of EU export value across product classes in 2025
Coffee, tea, cocoa and spices 6%
Non-edible 11%
Wine, beverages and food preparations 27%
Fruit, vegetables and olive oil 15%
Arable crops and plant based products 19%
Animal products 22%


Distribution of EU import value across regions in 20
Sub-Saharan Africa 15%
Mercosur 13%
E. neigh., W. Balkans & TR 12%
Other Western Europe 12%
South-East Asia 10%
North America 9%
South America (excl. MCS) 7%
China & Hong Kong 5%
North Africa 4%
Central America 4%
Rest of the World 9%

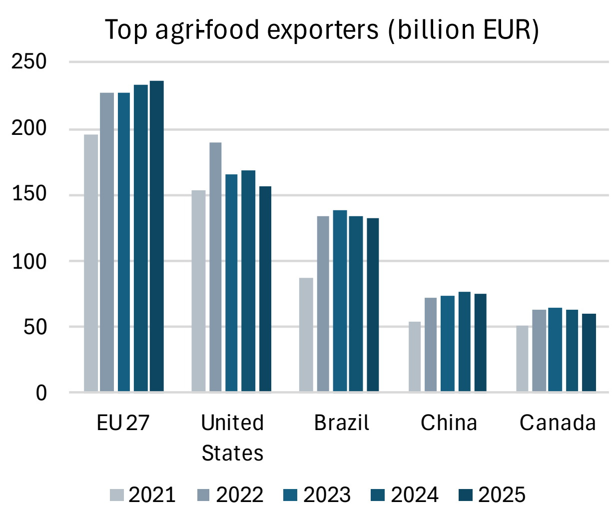

Distribution of EU import value across product classes in 2025
Arable crops and plant based products 25%
Fruit, vegetables and olive oil 23%
Coffee, tea, cocoa and spices 22%
Non-edible 11%
Wine, beverages and food preparations 10%
Animal products 9%


EU trade balance by product category (billion EUR)
30
20
10
0
-10
-20
-30
-40
Cereal preparations and milling products
Dairy products
Wine and wine based products
Pigmeat
Confectionery and chocolate
Mixed food preparations and ingredients
Beer, cider and other beverages
Pet food and forage crops
Preparations of fruit, nuts and vegetables
Olives and olive oil
Spirits and liqueurs
Poultry and eggs
Vegetables
Tobacco, cigars and cigarettes
Other animal products
Horticulture
Cereals
Beef and veal
Sugar and isoglucose
Unspecified
Sheep and goat
Margarine and other oils and fats (vegetable)
Vegetable oils (oilseeds and palm)
Non-edible for technical use
Oilseeds and protein crops
Fruit and nuts
Coffee, tea, cocoa and spices
2025
2024





Source: TradeDataMonitor LLC



Source: TradeDataMonitor LLC

9. Summary of trade data for the major product categories during 2025:

AGRI-FOOD CATEGORIES/PERIOD	EXPORTS	IMPORTS	TRADE BALANCE		
	2025		2024	2025	Difference
	million EUR				
Total Agrifood	**238 435**	**188 566**	**63 205**	**49 869**	**-13 335**
Cereal preparations and milling products	25 385	5 349	19 499	20 037	538
Dairy products	20 775	2 711	17 377	18 064	688
Wine and wine based products	16 418	1 449	15 913	14 970	- 943
Pigmeat	11 997	355	12 002	11 642	- 360
Confectionery and chocolate	13 291	3 436	9 006	9 855	849
Mixed food preparations and ingredients	16 059	6 712	9 121	9 347	226
Beer, cider and other beverages	10 505	2 546	8 264	7 959	- 305
Pet food and forage crops	8 976	3 231	5 050	5 745	695
Olives and olive oil	6 017	1 074	5 453	4 943	- 510
Preparations of fruit, nuts and vegetables	12 320	7 768	5 333	4 552	- 781
Spirits and liqueurs	8 259	4 306	4 389	3 953	- 436
Poultry and eggs	6 525	2 946	3 730	3 579	- 151
Vegetables	9 291	6 241	3 161	3 050	- 111
Tobacco, cigars and cigarettes	8 323	5 384	2 673	2 939	266
Other animal products	8 237	5 549	3 178	2 688	- 491
Horticulture	4 691	2 254	2 357	2 437	80
Cereals	10 742	8 680	1 924	2 062	138
Beef and veal	5 009	3 395	2 408	1 614	- 794
Sugar and isoglucose	1 976	1 512	607	463	- 144
Unspecified	1 034	582	733	452	- 280
Sheep and goat	812	1 584	- 604	- 771	- 167
Margarine and other oils and fats (vegetable)	2 473	4 941	-1 952	-2 468	- 516
Vegetable oils (oilseeds and palm)	2 307	7 549	-5 247	-5 242	4
Non-edible for technical use	4 365	10 273	-5 097	-5 907	- 810
Oilseeds and protein crops	2 371	18 521	-18 011	-16 150	1 861
Fruit and nuts	6 989	28 672	-18 467	-21 684	-3 216
Coffee, tea, cocoa and spices	13 288	41 547	-19 594	-28 259	-8 665
For info: fish and fish products	*8 156*	*31 630*	*-22 030*	*-23 474*	*-1 444*
Total agrifood and fish	*246 592*	*220 196*	*41 175*	*26 395*	*-14 779*

10. Further to the information reported to the Council with document 14726/25 at the previous discussion of trade-related agricultural issues in November 2025, the following points and developments are worth mentioning:

11. On 7 January 2026, EU agricultural ministers met in an extraordinary meeting, on the invitation of the European Commission and Minister Maria Panayiotou for the Cyprus Presidency of the Council. The Commission was represented at this meeting by Commissioners Hansen, Šefčovič and Várhelyi. Recognising that agriculture is crucial for European sovereignty and that the EU agri-food sector is key to European competitiveness through millions of jobs and added value, the participants took stock of the challenges facing farmers and the agri-food sector and exchanged views on their expectations for 2026. Discussions focused on concerns arising from heightened volatility and uncertainty in the global markets, as well as on the need to preserve a strong competitive position of European farmers.

Agri-food trade with the EU's principal trading partners

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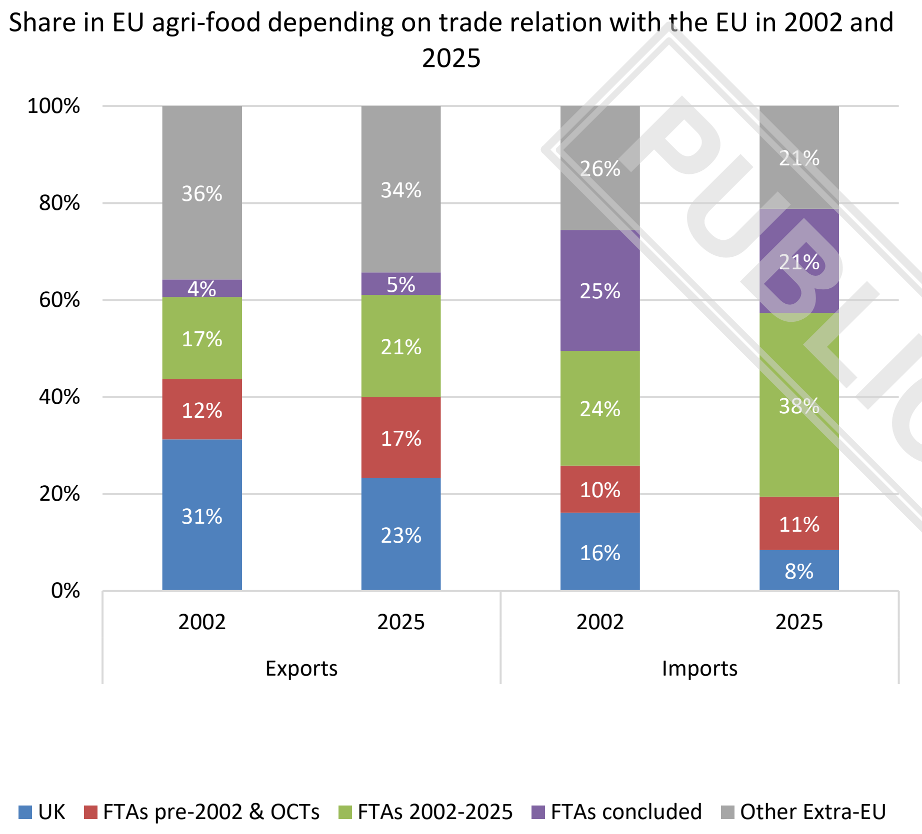
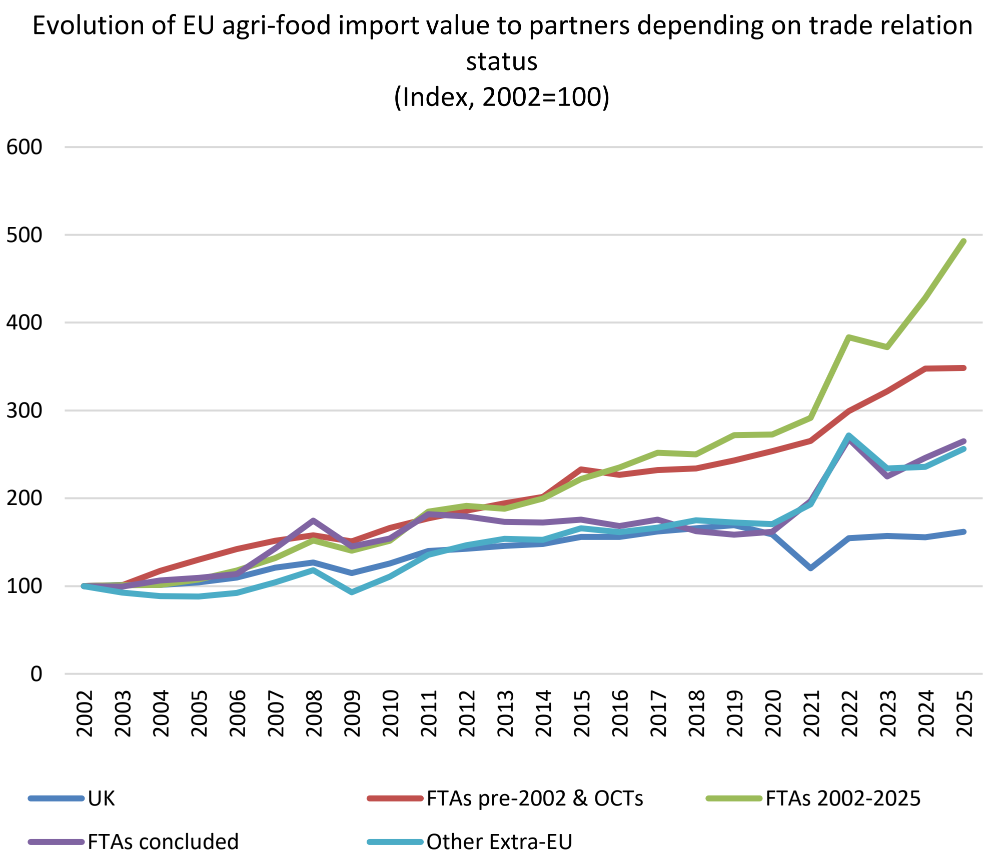
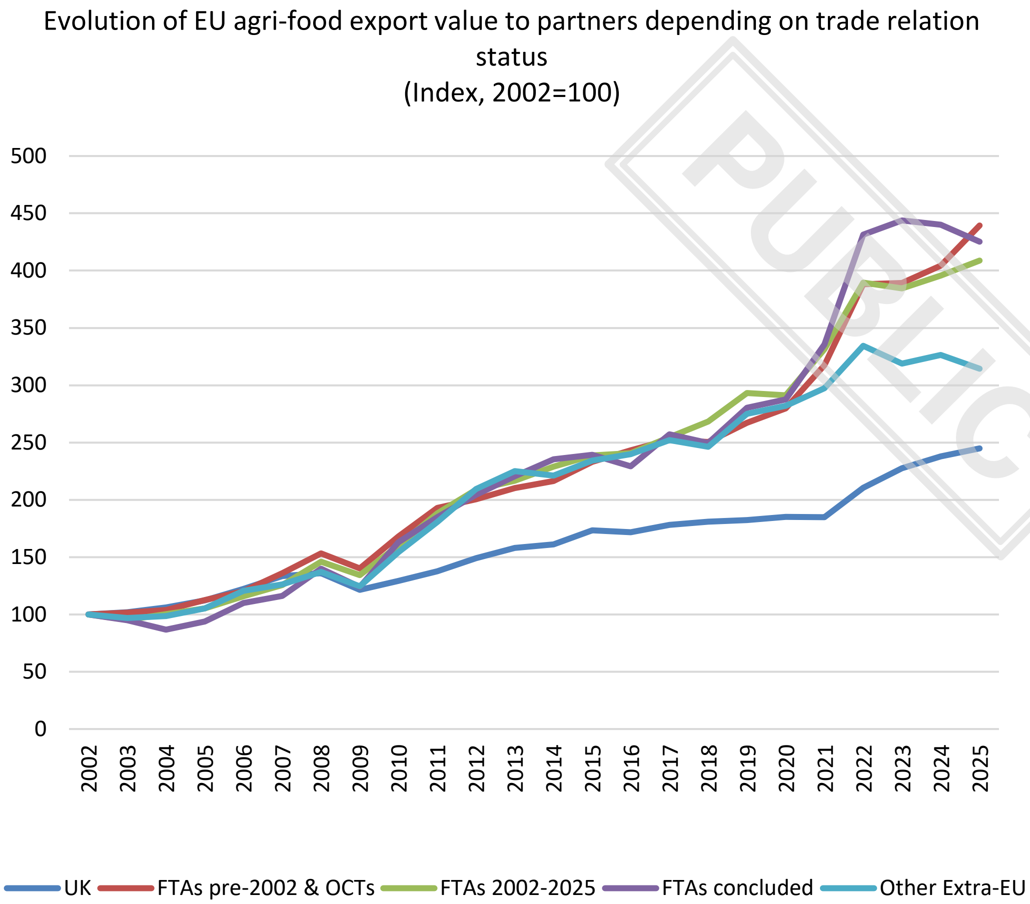

Share in EU agri-food depending on trade relation with the EU in 2002 and 2025
100%
80%
60%
40%
20%
0%
36%
4%
17%
12%
31%
34%
5%
21%
17%
23%
26%
25%
24%
10%
16%
21%
21%
38%
11%
8%
2002
2025
2002
2025
Exports
Imports
UK
FTAs pre-2002 & OCTs
FTAs 2002-2025
FTAs concluded
Other Extra-EU


Evolution of EU agri-food import value to partners depending on trade relation status
(Index, 2002=100)
600
500
400
300
200
100
0
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
UK
FTAs pre-2002 & OCTs
FTAs 2002-2025
FTAs concluded
Other Extra-EU


Evolution of EU agri-food export value to partners depending on trade relation status
(Index, 2002=100)
500
450
400
350
300
250
200
150
100
50
0
2002
2003
2004
2005
2006
2007
2008
2009
2010
2011
2012
2013
2014
2015
2016
2017
2018
2019
2020
2021
2022
2023
2024
2025
UK
FTAs pre-2002 & OCTs
FTAs 2002-2025
FTAs concluded
Other Extra-EU

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Negotiations for a new Generalised Scheme of Preferences Regime:

40. Negotiations for adoption of the Commission proposal for a new Generalized Scheme of Preferences (GSP) from 2027 onwards were finally concluded between the EP and the Council. The current GSP Regulation (EU) No 978/2012 expired on 31 December 2023 and was extended until 31 December 2027.The revised framework maintains the three main strands of support of the current scheme, Standard GSP, GSP+ and Everything but arms (EBA), with improvements such as increasing the number of international conventions on human and labor rights that will need to be respected in order for a third state to be a GSP beneficiary. The proposal also provides for an urgency procedure for the rapid withdrawal of preferences in case of violation of the principles of these conventions, for example, in case of serious and systematic violations of the principles.

41. In terms of agriculture preferences, the agreement includes provisions for reintroducing duties in case of sudden and significant rises in imports from a beneficiary country to protect Union producers. A specific automatic safeguard mechanism for rice imports has been introduced, using a tariff rate quota system. Under this mechanism, in the event of a significant surge of rice imports above historical average imports to the EU, these imports will be subject to MFN tariffs for a specific period to prevent serious disturbances to the EU rice market.

42. The co-legislators agreed, however, that no additional automatic safeguards should be created for other agricultural products. They agreed to give clear timelines for assessments by the Commission under a special surveillance mechanism and to make a reference to 'an upsurge of imports as a factor to be considered. In addition, the special surveillance mechanism has been strengthened to allow the EU to act when imports of agricultural products create disturbances on the EU market.