

EU trade with the United States - latest developments

Statistics Explained

Data extracted in November 2025

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Highlights

Trade tensions between the US and the EU boosted bilateral flows in Q1 2025, followed by a sharp drop in Q2. In Q3, imports rose slightly while exports fell – partly offset by a surge in chemical exports after a temporary tariff pause. The EU trade surplus shrank from € 81 billion to € 41 billion.

In the aftermath of Russia's aggression against Ukraine, the EU increased its imports of energy products from the United States. Consequently, EU imports from the United States grew more than imports from China and the rest of the world, and remained at a comparatively higher level

This article provides a picture of the recent developments in international trade in goods between the [European Union \(EU\)](#) and the United States. This article is part of an [online publication](#) providing recent statistics on international trade in goods, covering information on the EU's main partners, main goods traded, specific characteristics of trade as well as background information.

Recent developments

The United States has long been the EU's leading export destination and one of its main import partners. This strong bilateral relationship consistently generates a trade surplus for the EU, although its magnitude can fluctuate from one period to another. In 2025, this pattern persisted but with notable variations. In particular, the threat of a potential trade war between the United States and the EU triggered a sharp rise in bilateral trade flows in Q1, with both imports and especially exports increasing significantly (see Figures 1 and 2), followed by a marked decline in the second quarter. In the third quarter, imports grew slightly while exports registered a modest decrease, a decline that would have been considerably larger if a major company had not successfully negotiated a temporary pause in tariffs on chemical products with the United States. This agreement led to a sharp increase in chemical exports in September 2025, partially offsetting the broader decline observed in the previous months. As a result, the EU trade surplus in goods with the United States narrowed from € 81 billion in Q1 2025 to € 41 billion in Q3 2025.

Figure 1Figure 2Figure 3 shows the trade balance by product group. In Q3 2025, the combined surpluses for chemicals and related products, machinery & vehicles, other manufactured goods and food & drink were higher than the combined deficits for energy, raw materials and other goods. The trade surplus for chemical products returned to 'normal' levels in Q3 2025 (€ 23 billion) compared to Q1 2025 (€ 54 billion) when exporters massively increased exports in anticipation of possible tariffs imposed by the United States.

Figure 3Between Q1 2021 and Q1 2022, growth of EU imports from the United States, China and the rest of the world developed along similar lines (Figure 4). In the aftermath of Russia's aggression against Ukraine, the EU increased its imports of energy products from the United States. Consequently, EU imports from the United States grew more than imports from China and the rest of the world, and remained at a comparatively higher level.

Figure 4Since 2021, EU exports to the United States grew more than EU exports to China with the rest of the world in between (Figure 5). Compared to Q1 2021 exports to the United States increased by 39 [percentage points \(pp\)](#) while exports to China decreased by 13 pp. Exports to the rest of the world increased by 27 pp. The peak in Q1 2025 exports to the United States, discussed above, is also clearly visible in Figure 5.

Figure 5

EU - United States most traded goods

Following Russia's invasion of Ukraine and the imposition of bans on Russian oil and gas, the United States partly replaced Russia as a source of these imports. Consequently, in 2025, fuels were the most imported product group from the United States, followed by machinery and pharmaceuticals (Figure 6).

Figure 6 The top 3 exported product groups to the United States in the first three quarters of 2025 were pharmaceuticals, machinery and organic chemicals. Exports of organic chemicals increased strongly compared to 2024 due to exporters anticipating increased tariffs and rushing their exports before the tariffs came into force (Figure 7).

Figure 7

Data sources

EU data is taken from Eurostat's COMEXT database. COMEXT is the reference database for international trade in goods. It provides access not only to both recent and historical data from the EU Member States but also to statistics of a significant number of non-EU countries. International trade aggregated and detailed statistics disseminated via the Eurostat website are compiled from COMEXT data according to a monthly process.

Data are collected by the competent national authorities of the EU Member States and compiled according to a harmonised methodology established by EU regulations before transmission to Eurostat. For extra-EU trade, the statistical information is mainly provided by the traders on the basis of customs declarations.

EU data are compiled according to EU guidelines and may, therefore, differ from national data published by the EU Member States. Statistics on extra-EU trade are calculated as the sum of trade of each of the 27 EU Member States with countries outside the EU. In other words, the EU is considered as a single trading entity and trade flows are measured into and out of the area, but not within it.

Product classification

In figures 1,2 and 3 products are defined according to the fourth revision of the standard international trade classification (SITC). The main categories are

- food, drinks and tobacco (Sections 0 and 1 - including live animals)
- raw materials (Sections 2 and 4)
- energy products (Section 3)
- chemicals and related products (Section 5 - including pharmaceuticals and plastics)
- machinery and transport equipment (Section 7)
- other manufactured goods (Sections 6 and 8)
- other goods (Section 9)

In figure 6 and 7 product groups are presented according to the [Harmonised System for product classification](#). A full description is available from Eurostat's classification server [\[1\]](#). **Methodology**

According to the EU concepts and definitions, extra-EU trade statistics (trade between EU Member States and non-EU countries) do not record exchanges involving goods in transit, placed in a customs warehouse or given temporary admission (for trade fairs, temporary exhibitions, tests, etc.). This is known as 'special trade'. The partner is the country of final destination of the goods for exports and the country of origin for imports.

Unit of measure

Trade values are expressed in millions or billions (1 000 millions) of euros. They correspond to the statistical value, i.e. to the amount which would be invoiced in the event of sale or purchase at the national border of the reporting country. It is called a **FOB** value (free on board) for exports and a **CIF** value (cost, insurance, freight) for imports.

Context

Trade is an important indicator of Europe's prosperity and place in the world. The bloc is deeply integrated into global markets both for the products it sources and the exports it sells. The EU trade policy is one of the main pillars of the EU's relations with the rest of the world.

Because the 27 EU Member States share a single market and a single external border, they also have a single trade policy. EU Member States speak and negotiate collectively, both in the [World Trade Organisation](#), where the rules of international trade are agreed and enforced, and with individual trading partners. This common policy enables them to speak with one voice in trade negotiations, maximising their impact in such negotiations. This is even more important in a globalised world in which economies tend to cluster together in regional groups.

The openness of the EU's trade regime has meant that the EU is the biggest player on the global trading scene and remains a good region to do business with. Thanks to the ease of modern transport and communications, it is now easier to produce, buy and sell goods around the world which gives European companies of every size the potential to trade outside Europe.

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