



European
Commission



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS IN JUNE 2022
Publication: September 2022

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<https://ec.europa.eu/info/food-farming-fisheries/trade/trade-and-international-policy-analysis>

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Please cite this publication as: EC (2022), Monitoring EU agri-food trade. European Commission, DG Agriculture and Rural Development, Brussels.

Data source: Eurostat COMEXT

Extraction date for statistics: 16/09/2022

Next issue will be published on 24/10/2022

Note to the reader

The latest available consolidated trade data at EU level cover market developments until June 2022. Monthly figure figures can be compared with the previous month. Year-to-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. The unit value is the average price of products traded in the period concerned (trade value at the border divided by quantity registered).

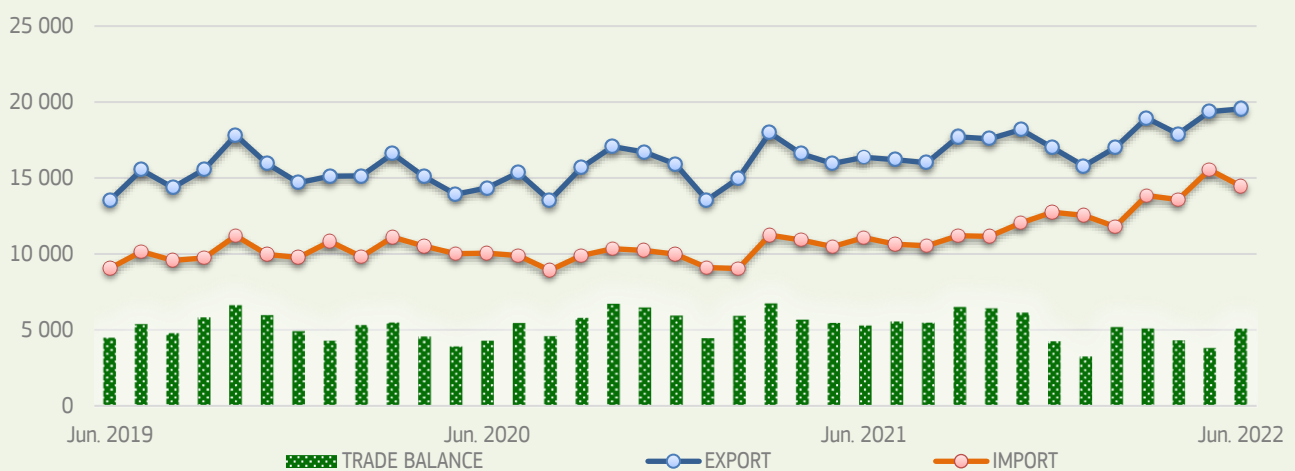
HIGHLIGHTS: MONTHLY DATA FOR JUNE 2022 SHOW AN INCREASED TRADE BALANCE

EU exports in June remained elevated but imports slowed down. This resulted in an improved **trade balance at EUR 5.1 billion**, which is a significant increase compared to the previous month of May (+33%).

EU **exports** stayed high at **EUR 19.5 billion**. This is a small increase compared to May (+1%), but still 19.5% higher compared to June last year. Exports to sub-saharan Africa increased the most month-to-month (+EUR 121 million) which is due not only to a price effect but also increased volumes of commodities (notably wheat) to the continent.

EU **imports** reached **EUR 14.5 billion** in June 2022, a -7% decrease compared to the previous month, but still a +31% increase compared to June 2021. This monthly decrease is notably due to a decrease in EU monthly imports from Brazil and the US, which are still well above the imports of June 2021.

EU27: Trade of Agri-food products (million EUR)



Source: Comext



EU AGRI-FOOD EXPORTS

INCREASE IN EU EXPORTED VOLUMES IN JUNE BOOSTED TOTAL VALUE OF EXPORTS

In June 2022, EU agri-food exports increased by 1% month-to-month, to reach EUR 19.5 billion. Even though international commodity prices remained at historical heights back in June, they slightly decreased compared to the previous month of May. This is particularly the case for cereals, dairy products and oilseeds for which quantity exported increased while prices decreased month-to-month.

EU agri-food exports to **sub-saharan Africa** continued to increase in June. Particularly, EU exported volumes of cereals in June were 80% higher compared to the last three-year average (June 2019, June 2020 and June 2021). This is due, in particular, to an increase in EU wheat exported volumes, +82%.

EU exports to **Ukraine** were 25% higher in June compared to June 2021 and reached EUR 275 million. Notably, EU vegetables and pigmeat exports to Ukraine continued to be the most dynamic in June. Export volumes in June were 557% and 112% higher than last year.

Trade developments in January-June 2022

EU exports have been increasing the most to the UK, the US and Morocco during the first semester (S1) 2022 compared to S1 2021.

EU exports to **Morocco** increased by 57% in the period (+EUR 728 million) while exports to the whole **MENA region** has increased substantially. This is also due to an increase in quantity exported of, among others, cereals (+1 million tons exported

compared to S1 2021, half of which being wheat), sunflower seeds (+135%), fruits and nuts (+11%) and vegetables (+29%).

EU exports to **the UK** were 19% higher in the S1 2022 compared to 2021. This was led by a sharp increase in cereals preparations (+23%, +EUR 478 million year-to-year), mostly due to an increase in the unit import price (+14%) but also volume increase (+8%).

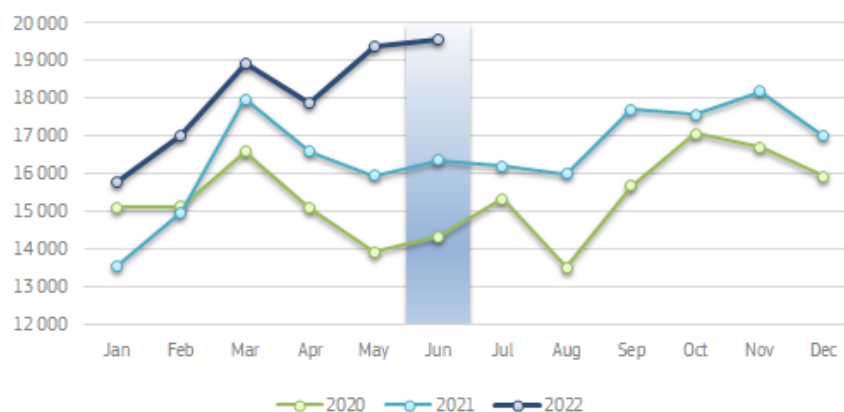
EU exports to **China** are still on the low levels with a 27% decrease year-to-year.

MORE WHEAT, SUNFLOWER AND FRESH DAIRY PRODUCTS EXPORTED IN JUNE

In June 2022, the EU exported more volumes compared to May 2022. Indeed, consolidated data show that the EU exported +16% more cereals than in May (+74% compared to June 2021). **Wheat** exported volumes increased by 7% and were also 137% higher than exports in June 2021. Exports of **oilseeds and protein crops** were also 13% higher (still in volumes) than in May and 49% higher than in June 2021. This was not the case for soya beans and rapeseed for which exported volumes decreased while unit value in the international market continued to rise.

For animal products, EU exports of beef and veal, **dairy** and sheep and goat exports increased. Exports of **poultry** slightly declined. Except for sheep and goat, unit export value for the other animal products dropped compared to May 2022.

EU exports of agri-food products to extra-EU (million EUR)



EU AGRI-FOOD IMPORTS

LESS QUANTITY IMPORTED IN JUNE LED TO A SLIGHT DECLINE OF EU IMPORT BILL

After the peak in EU imports in May, imports declined in June to EUR 14.5 billion (-7%). Imports from Brazil, the US and Indonesia decreased month-to-month. At the same time, EU imports from Ukraine increased substantially (+EUR 218 million, +33%).

EU imports from **Brazil** decreased by 21% in June compared to May, mainly due to less imported volumes. The EU imported significantly less cereals (-60% month-to-month) and oilseeds (-31%) which resulted in a decrease of the import bill of EUR 58 million and EUR 390 million respectively. On the contrary, EU imports increased for beef and poultry (both a volume and price effect).

Following the implementation of the Solidarity Lanes in May and the temporary trade liberalisation in June, EU agri-food imports from **Ukraine** increased in the month of June. This was particularly the case for oilseeds (+EUR 92 million) and oils (+EUR 90 million). Imports of poultry was the third biggest increase (+EUR 17 million), followed by cereals (+EUR 11 million). For these products, this was mainly a quantity-driven increase.

Trade developments in January-June 2022

Looking at the first semester of 2022, the EU has imported EUR 82 billion of agri-food products. It is EUR 19 billion above the first semester (S1) 2021, or 32%.

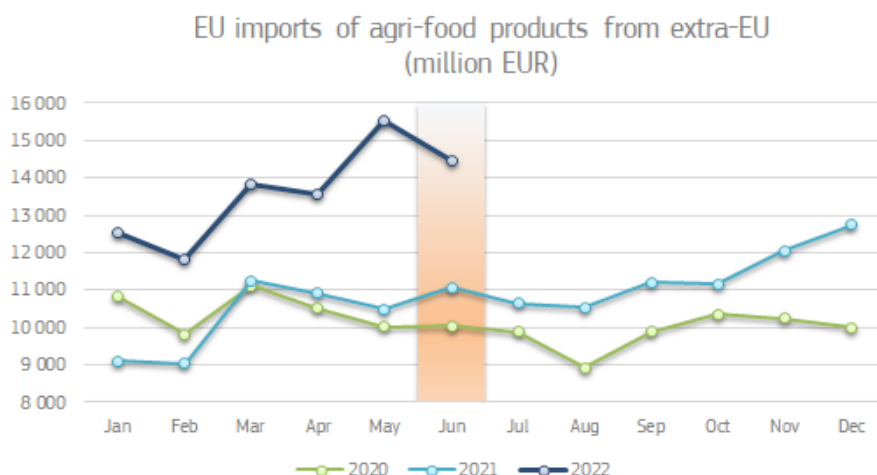
EU imports from **Brazil** have been 46% above last year. This is not only a consequence of high international commodity prices but also an increase in volumes imported from this country. This has been particularly the case for maize (+605 thousand tons compared to S1 2021), soya meals (+390 thousand tons). Raw sugar imports have also been on the rise (+101 thousand tons).

EU imports in S1 2022 increased as well from **south-east Asia**, particularly from Indonesia, Vietnam and Malaysia. Total EU imports from these three countries increased by 35% compared to S1 2021, an additional EUR 1.6 billion. This is mainly coming from imports of organic chemicals and coffee.

DECLINE IN IMPORTS OF OILSEEDS AND CEREALS INTO THE EU IN JUNE

In June 2022, the EU import bill decreased compared to May 2022 mainly thanks to a decline in **cereals** and **oilseeds** imports (-EUR 304 million and -EUR 442 million, respectively). **Fruit and vegetables** imports also declined (by -EUR 206 million). This is solely a quantity-driven effect.

Over the first semester 2022, EU imports increased across the board. This has been due, in particular, to the increase in international prices. The strongest increase has occurred in horticulture (+56% in import unit value), vegetable oils, as well as margarine, oils and fats (+51%).



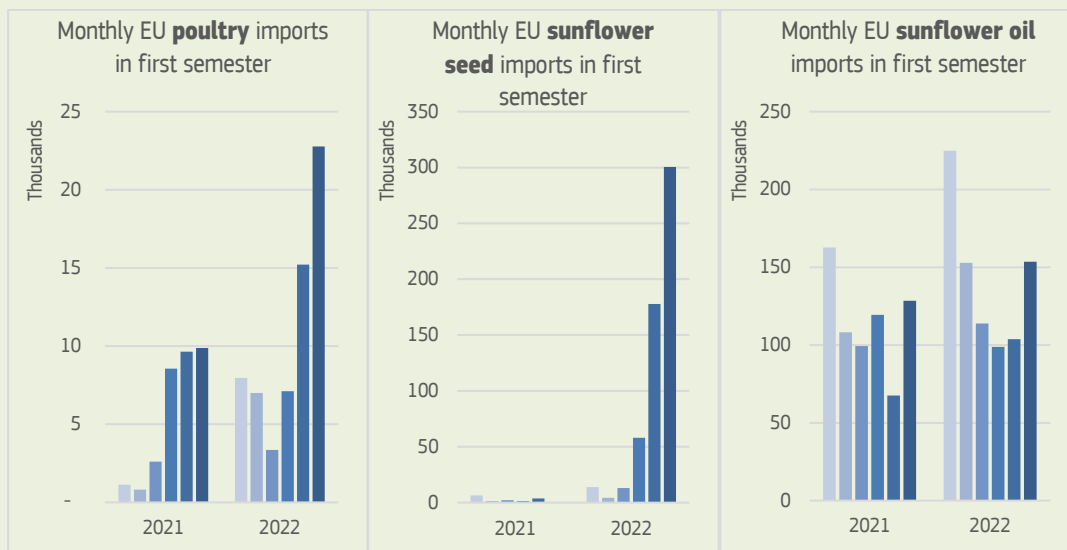
FOCUS

Ukraine – EU trade flows until June 2022

During the first semester of 2022, the **EU agri-trade flows with Ukraine** increased by 36% compared to last year, to reach EUR 5.8 billion. The increase has been led by the rise in international prices but also the volumes traded between the EU and Ukraine.

EU imports from Ukraine increased by 61% in **first semester (S1) 2022**, compared to S1 last year. Total EU imports reached **EUR 4.4 billion**. The biggest increases have been coming from vegetable oils (+EUR 522 million), cereals (+497 million) and oilseeds and protein crops (+EUR 471 million). Despite the **rise in international commodity prices**, these increases in values have been accompanied by an **increase in volumes** as well. EU imported 942 thousand tons of vegetable oils (+23% compared to last year), 5.3 million tons of cereals (+19%) and 1.6 million tons of oilseeds (+34%).

In **June**, following the implementation of the EU solidarity lanes initiative in May and the temporary trade liberalisation early June, the most significant increase month-to-month was reported for **sunflower seeds** (+69% in value terms, +69% in volumes) and oilseeds (+50% in value, +48% in volumes). **Poultry imports** into the EU also rose in June month-to-month by 48% in value terms and +50% in volumes (and also 129% higher than the June average in the past three years).



EU exports to Ukraine **decreased** by 10% compared to semester 2021, in value terms. Total value of exports reached EUR 1.3 billion. Exports of sugar and isoglucose (-75% in value terms) and olives and olive oil (-60%) were the biggest decline. This had been mainly due to a reduction in volumes exported (respectively, -80% and -66%). The sector that has been also impacted is sheep and goat (-99% in both value and volume terms).

TABLE 1

EU AGRIFOOD EXPORTS – COUNTRIES WITH MOST IMPORTANT CHANGES (million EUR)

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Jun21	Jan22-Jun22	Difference	
TOTAL AGRIFOOD	184 468	198 087	100%	95 405	108 536	13 131	14%
United Kingdom	41 963	41 942	21%	19 602	23 237	3 635	19%
United States	21 447	24 510	12%	11 745	14 294	2 549	22%
Morocco	2 165	2 366	1%	1 268	1 997	729	57%
Switzerland	9 030	9 844	5%	4 996	5 637	641	13%
Japan	6 984	7 384	4%	3 476	4 062	586	17%
Cambodia	252	419	0%	236	102	- 134	-57%
Ukraine	2 841	3 107	2%	1 456	1 304	- 152	-10%
Hong Kong	2 541	2 157	1%	1 083	860	- 223	-21%
Russian Federation	6 841	7 356	4%	3 512	3 061	- 451	-13%
China	17 684	17 138	9%	9 433	6 933	-2 500	-27%
Other countries	72 721	81 863	41%	38 598	47 050	8 452	22%

TABLE 2

EU AGRIFOOD EXPORTS - TOP 15 EXPORT COUNTRIES (million EUR)

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Jun21	Jan22-Jun22	Difference	
TOTAL AGRIFOOD	184 468	198 087	100%	95 405	108 536	13 131	14%
United Kingdom	41 963	41 942	21%	19 602	23 237	3 635	19%
United States	21 447	24 510	12%	11 745	14 294	2 549	22%
China	17 684	17 138	9%	9 433	6 933	- 2 500	-27%
Switzerland	9 030	9 844	5%	4 996	5 637	641	13%
Japan	6 984	7 384	4%	3 476	4 062	586	17%
Russian Federation	6 841	7 356	4%	3 512	3 061	- 451	-13%
Norway	4 844	5 407	3%	2 709	2 925	216	8%
Korea, Republic of	3 029	3 939	2%	1 804	2 371	567	31%
Canada	3 637	4 049	2%	1 870	2 251	381	20%
Morocco	2 165	2 366	1%	1 268	1 997	729	57%
Turkey	3 061	3 561	2%	1 643	1 959	316	19%
Saudi Arabia	4 305	3 630	2%	1 797	1 890	92	5%
Australia	3 188	3 300	2%	1 506	1 790	284	19%
Algeria	2 989	2 950	1%	1 515	1 786	271	18%
Israel	2 141	2 648	1%	1 253	1 558	305	24%
Other countries	51 160	58 062	29%	27 276	32 785	5 509	20%

TABLE 3

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Jun21	Jan22-Jun22	Difference	
TOTAL AGRIFOOD	184 468	198 087	100%	95 405	108 536	13 131	14%
Cereals	11 414	12 004	6%	5 290	7 726	2 436	46%
Cereal preparations and milling products	18 779	18 811	9%	8 925	10 592	1 667	19%
Dairy products	15 988	17 003	9%	8 239	9 665	1 425	17%
Mixed food preparations and ingredients	11 208	12 265	6%	5 946	7 161	1 215	20%
Preparations of fruit, nuts and vegetables	8 060	8 411	4%	3 984	4 809	825	21%
Fruit and nuts	6 026	5 711	3%	2 846	2 988	143	5%
Sheep and goat	617	575	0%	323	390	67	21%
Sugar and isoglucose	556	596	0%	253	297	44	17%
Horticulture	3 868	4 632	2%	2 522	2 445	- 77	-3%
Pigmeat	15 110	14 525	7%	7 994	6 520	-1 474	-18%
Other products	92 841	103 553	52%	49 084	55 944	6 860	14%

TABLE 4

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Jun21	Jan22-Jun22	Difference	
TOTAL AGRIFOOD	184 468	198 087	100%	95 405	108 536	13 131	14%
Cereal preparations and milling products	18 779	18 811	9%	8 925	10 592	1 667	19%
Dairy products	15 988	17 003	9%	8 239	9 665	1 425	17%
Wine and wine based products	13 452	16 631	8%	7 858	8 589	730	9%
Cereals	11 414	12 004	6%	5 290	7 726	2 436	46%
Mixed food preparations and ingredients	11 208	12 265	6%	5 946	7 161	1 215	20%
Pigmeat	15 110	14 525	7%	7 994	6 520	- 1 474	-18%
Beer, cider and other beverages	9 713	10 014	5%	4 885	5 336	451	9%
Preparations of fruit, nuts and vegetables	8 060	8 411	4%	3 984	4 809	825	21%
Spirits and liqueurs	6 820	8 410	4%	3 852	4 549	697	18%
Confectionery and chocolate	7 886	8 890	4%	3 815	4 497	681	18%
Pet food and forage crops	6 506	7 346	4%	3 523	4 098	575	16%
Vegetables	7 361	7 396	4%	3 668	3 969	301	8%
Other animal products	6 510	7 531	4%	3 651	3 803	152	4%
Coffee, tea, cocoa and spices	5 932	6 175	3%	2 990	3 475	484	16%
Fruit and nuts	6 026	5 711	3%	2 846	2 988	143	5%
Other products	33 701	36 963	19%	17 938	20 761	2 823	16%

TABLE 5

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Jun21	Jan22-Jun22	Difference	
TOTAL AGRIFOOD	121 599	130 189	100%	61 863	81 777	19 914	32%
Brazil	11 362	13 536	10%	6 391	9 347	2 956	46%
United Kingdom	15 685	11 866	9%	5 186	7 105	1 919	37%
China	5 128	6 096	5%	2 693	4 528	1 835	68%
Ukraine	5 837	6 917	5%	2 757	4 446	1 689	61%
Australia	1 155	1 900	1%	1 115	2 357	1 242	111%
Cuba	176	176	0%	102	90	- 13	-12%
Cameroon	697	694	1%	374	355	- 19	-5%
Côte d'Ivoire	3 302	3 341	3%	1 826	1 763	- 63	-3%
Nigeria	477	655	1%	350	249	- 102	-29%
Canada	3 131	2 831	2%	1 396	1 262	- 134	-10%
Other countries	74 650	82 179	63%	39 672	50 275	10 603	27%

TABLE 6

EU AGRIFOOD IMPORTS - TOP 15 IMPORT COUNTRIES (million EUR)

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Jun21	Jan22-Jun22	Difference	
TOTAL AGRIFOOD	121 599	130 189	100%	61 863	81 777	19 914	32%
Brazil	11 362	13 536	10%	6 391	9 347	2 956	46%
United Kingdom	15 685	11 866	9%	5 186	7 105	1 919	37%
United States	9 587	9 254	7%	4 649	5 778	1 129	24%
China	5 128	6 096	5%	2 693	4 528	1 835	68%
Ukraine	5 837	6 917	5%	2 757	4 446	1 689	61%
Argentina	4 378	5 176	4%	2 256	3 260	1 004	45%
Indonesia	4 334	5 635	4%	2 400	2 991	591	25%
Turkey	4 652	5 031	4%	2 394	2 791	396	17%
Australia	1 155	1 900	1%	1 115	2 357	1 242	111%
Switzerland	4 596	4 521	3%	2 140	2 340	200	9%
Morocco	2 471	2 636	2%	1 671	2 159	488	29%
India	2 364	2 919	2%	1 554	1 865	310	20%
Côte d'Ivoire	3 302	3 341	3%	1 826	1 763	- 63	-3%
Viet Nam	2 168	2 221	2%	998	1 626	628	63%
Malaysia	2 249	2 678	2%	1 192	1 575	384	32%
Other countries	42 332	46 462	36%	22 641	27 846	5 204	23%

TABLE 7

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Jun21	Jan22-Jun22	Difference	
TOTAL AGRIFOOD	121 599	130 189	100%	61 863	81 777	19 914	32%
Oilseeds and protein crops	15 115	18 253	14%	9 075	12 540	3 465	38%
Coffee, tea, cocoa and spices	15 944	17 063	13%	8 195	10 820	2 625	32%
Non-edible for technical use	5 841	7 486	6%	3 103	5 328	2 225	72%
Cereals	5 771	6 177	5%	2 843	4 722	1 879	66%
Vegetable oils (oilseeds and palm)	6 712	8 243	6%	3 412	5 180	1 768	52%
Horticulture	1 688	1 923	1%	998	1 135	137	14%
Wine and wine based products	1 775	1 664	1%	754	834	80	11%
Sugar and isoglucose	843	878	1%	406	460	54	13%
Olives and olive oil	751	636	0%	330	381	51	15%
Pigmeat	415	294	0%	136	176	39	29%
Other products	66 743	67 573	52%	32 611	40 201	7 590	23%

TABLE 8

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Jun21	Jan22-Jun22	Difference	
TOTAL AGRIFOOD	121 599	130 189	100%	61 863	81 777	19 914	32%
Oilseeds and protein crops	15 115	18 253	14%	9 075	12 540	3 465	38%
Fruit and nuts	21 050	20 704	16%	10 453	11 337	884	8%
Coffee, tea, cocoa and spices	15 944	17 063	13%	8 195	10 820	2 625	32%
Non-edible for technical use	5 841	7 486	6%	3 103	5 328	2 225	72%
Vegetable oils (oilseeds and palm)	6 712	8 243	6%	3 412	5 180	1 768	52%
Cereals	5 771	6 177	5%	2 843	4 722	1 879	66%
Mixed food preparations and ingredients	5 182	5 588	4%	2 636	3 430	793	30%
Preparations of fruit, nuts and vegetables	5 413	5 420	4%	2 614	3 026	412	16%
Other animal products	4 660	4 657	4%	2 131	2 875	744	35%
Vegetables	4 146	4 278	3%	2 342	2 843	501	21%
Margarine and other oils and fats (vegetable)	3 023	3 939	3%	1 833	2 580	747	41%
Cereal preparations and milling products	3 759	3 852	3%	1 813	2 377	564	31%
Spirits and liqueurs	3 060	3 296	3%	1 334	1 953	619	46%
Pet food and forage crops	2 705	2 751	2%	1 284	1 738	454	35%
Tobacco, cigars and cigarettes	2 468	2 299	2%	1 132	1 520	388	34%
Other products	16 749	16 182	12%	7 661	9 508	1 847	24%

TABLE 9

AGRI-FOOD TRADE BALANCE (MILLION EUR)

TRADE BALANCE			
PRODUCT/PERIOD	Exports	Imports	Trade balance
	Jan22-Jun22	Jan22-Jun22	Jan22-Jun22
million EUR			
TOTAL AGRIFOOD	108 536	81 777	26 759
Dairy products	9 665	1 157	8 508
Cereal preparations and milling products	10 592	2 377	8 215
Wine and wine based products	8 589	834	7 755
Pigmeat	6 520	176	6 344
Beer, cider and other beverages	5 336	1 110	4 226
Mixed food preparations and ingredients	7 161	3 430	3 732
Confectionery and chocolate	4 497	1 242	3 255
Cereals	7 726	4 722	3 004
Spirits and liqueurs	4 549	1 953	2 596
Pet food and forage crops	4 098	1 738	2 360
Olives and olive oil	2 477	381	2 096
Preparations of fruit, nuts and vegetables	4 809	3 026	1 783
Poultry and eggs	2 739	1 039	1 700
Tobacco, cigars and cigarettes	2 842	1 520	1 322
Horticulture	2 445	1 135	1 310
Vegetables	3 969	2 843	1 126
Other animal products	3 803	2 875	928
Beef and veal	2 098	1 231	867
Unspecified	927	95	831
Sugar and isoglucose	297	460	- 163
Sheep and goat	390	649	- 259
Margarine and other oils and fats (vegetable)	1 099	2 580	-1 481
Non-edible for technical use	2 417	5 328	-2 911
Vegetable oils (oilseeds and palm)	1 826	5 180	-3 353
Coffee, tea, cocoa and spices	3 475	10 820	-7 345
Fruit	2 988	11 337	-8 349
Oilseeds and protein crops	1 205	12 540	-11 336



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