



European
Commission



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS in October 2023

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CONTENTS

[HIGHLIGHTS](#)

[EU AGRI-FOOD EXPORTS](#)

[EU AGRI-FOOD IMPORTS](#)

[TABLES](#)

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Note to the reader

The latest available consolidated trade data at EU level cover market developments in October 2023. Monthly figures can be 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. The unit value is the average price of products traded in the period concerned (trade value at the border divided by quantity registered).

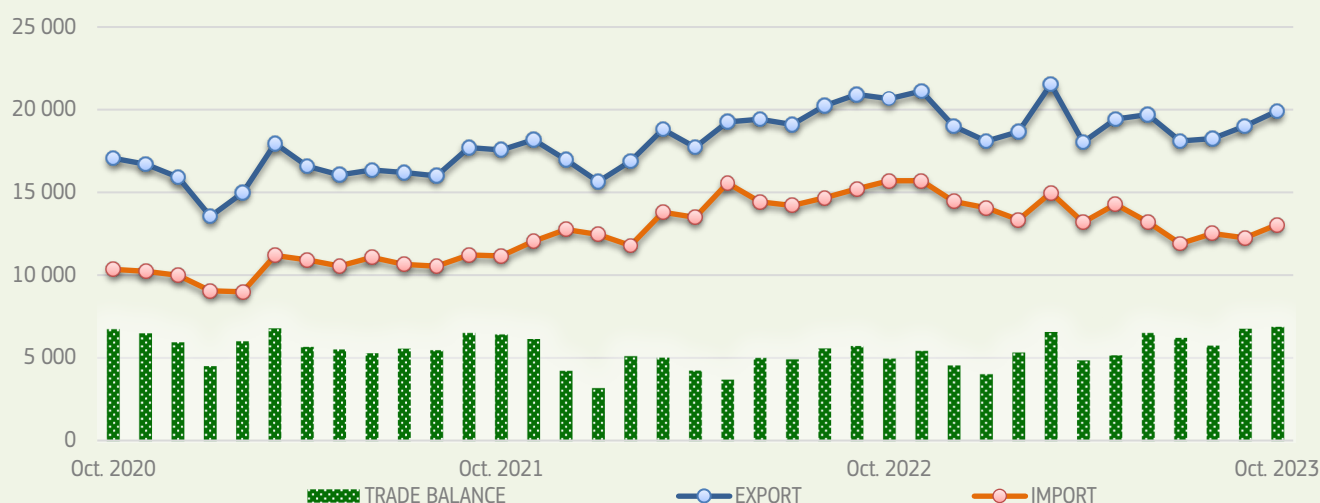
HIGHLIGHTS: EU agri-food trade grows in October 2023, with trade surplus remaining at a high level

EU agri-food trade surplus remained stable at +EUR 6.9 billion in October 2023. This is its highest level over the last three years and 38% higher compared to October 2022. The cumulative trade balance (January to October 2023) reached EUR 58 billion. It is EUR 10.6 billion higher compared to the same period in 2022.

EU exports increased by 5% month-on-month at EUR 19.9 billion in October 2023. This remains 4% lower than in October 2022. Cumulative exports since January reached EUR 190.8 billion, at the same level than in 2022. Main increases were for processed products, including cereal preparations and preparations of fruit and nuts.

EU imports increased by 6% month-on-month in October. They reached EUR 13 billion, still 17% below their level of October 2022. Cumulative imports (from January to October 2023) reached EUR 132.8 billion, 6% below their 2022 level, with increases in tobacco products and sugar imports and reductions in imports of oilseeds and protein crops as well as vegetable oils.

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



EU AGRI-FOOD EXPORTS

EU AGRI-FOOD EXPORTS CONTINUE TO GROW IN OCTOBER 2023

EU agri-food exports increased to EUR 19.9 billion in October 2023, a 5% increase month-on-month. Still, they remain 4% below their October 2022 level. Cumulative exports from January to October 2023 reached EUR 190.8 billion, EUR 2.1 billion (+1%) higher than for the same period last year.

EU agri-food exports to the **UK** remained high, with a growth of EUR 3.3 billion (+8%) in cumulative value compared to 2022, mostly due to higher export prices for cereal preparations and milling products, preparations of fruit and nuts, confectionery and chocolate, and pigmeat.

Türkiye is the second destination for which EU cumulative exports increased the most in 2023 (+EUR 835 million, +26%). This is explained in particular by a large increase of beef exports.

Ukraine was the third destination for which EU agri-food exports grew the most compared to 2022, with an increase of EUR 447 million (+19%), across most product categories. They reached EUR 2.8 billion in cumulative value from January to October, their highest level over the last four years.

Cumulative exports to the **US** decreased compared to 2022, with a reduction of EUR 1.9 billion (-8%). Nonetheless, they remain higher than in 2020 and 2021.

EU exports to **Egypt** remained at a low level, with a reduction of -EUR 858 million (-35%) in cumulated value compared to 2022, mainly driven by a reduction of cereal exports (-EUR 819 million). A similar situation can be observed in direction of **Algeria** and **Iran**, with a reduction of cumulative exports of respectively -EUR 681 million (-22%) and -EUR 576 million (-59%).

Cumulative exports of **cereal preparations and milling products** remained high with an increase of +EUR 1.4 billion (+8%) compared to 2022, followed by exports of **preparations of fruit and vegetables** (+EUR 1.3 billion, +16%) and **confectionary and chocolate** (+EUR 1.1 billion, +13%). However, these increases in value are solely explained by higher prices, while export volumes declined. **Tobacco** products exports also increased by EUR 1 billion (+20%), mostly due to increased volumes.

On the other hand, cumulative exports of **cereals** decreased by EUR 2.2 billion (-15%) compared to 2022. However, this is explained by reduced export prices while volumes exported increased by 5%.

Exports of **pigmeat** remain at a low level, with a reduction of EUR 1.2 billion (-10% in value, -19% in volume). Cumulated exports of **spirits and liqueurs** decreased by EUR 693 million (-8%), and **wine and wine-based products** by EUR 520 million (-3%), due to reduced volumes exported.

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



EU AGRI-FOOD IMPORTS

EU IMPORTS INCREASED IN SEPTEMBER, BUT REMAIN LOWER THAN IN 2022

The value of EU **agri-food imports** was **EUR 13 billion** in October, an increase of 6% compared to the previous month, but still 17% below their level in October 2022. Cumulative imports from January to October 2023 reached EUR 132.8 billion, a 6% reduction compared to the same period in 2022 (-EUR 8.5 billion).

After high agri-food import values from **Ukraine** in the second half of 2022 and the beginning of 2023, monthly imports in September and October 2023 were almost back at their 2021 level and nearly half lower than at this period in 2022 (-45%). Cumulative imports from January to October are now 1% higher (+EUR 100 million) compared to this period in 2022. However, different evolutions can be observed across products, with large increases in cereals imports (+EUR 1.2 billion, +39%), sugar (+EUR 254 million, +652%) and poultry (+EUR 148 million, +50%), while imports decreased in oilseeds and protein crops (-EUR 762 million, -29%) and vegetable oils (-EUR 688 million, -29%).

Imports from **Türkiye** now represent the largest increase in cumulative value compared to 2022 (+EUR 885 million, +20%), due to increased imports of cereals, fruit and nuts, vegetables and olives and olive oil. Imports from **Egypt** also grew by EUR 484 million (+41%), mostly due to higher imports of fruits and nuts and vegetables.

On the other hand, reductions in cumulative imports could be observed from **Brazil** (-EUR 2.2 billion, -13%, mostly in soya beans, coffee and maize), **Argentina** (-EUR 1.6, -29%, mostly soya meals), **China** (-EUR 1.1 billion, -13%, mainly non edible products) and **Australia** (-EUR 1 billion, -31%, mostly rapeseed).

The largest increases in cumulative import value were for **tobacco** products (+EUR 1 billion, +35%), as well as for **sugar and isoglucose** (+EUR 831 million, +92%). White sugar imports doubled in volume (+EUR 509 million, +134% in value), while raw sugar imports increased by 35% (+EUR 322 million, +61% in value). Imports of **vegetables** also increased (+EUR 602 million, +14%), as well as imports of **olive and olive oil** (+343 million, +57%, mostly due to higher prices). **Cereals** imports are now 3% higher in value compared to 2022 (+EUR 330 million), but remain 13% higher in volume.

On the other hand, significant reductions in import value could be observed for **oilseeds and protein crops** (-EUR 3.4 billion, -16%) and **vegetable oils** (-EUR 2.8 billion, -30%), due to reductions of both prices and volumes. Similar reductions in import values were observed for **non-edible products** (-EUR 1.6 billion, -17%, mostly due to lower prices), **coffee, tea, cocoa and spices** (-EUR 1.3 billion, -7%) and **margarine and other oils and fats** (-EUR 1.1 billion, -24%).

EU imports of agri-food products from extra-EU (million EUR)



TABLE 1

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

TRADING PARTNERS	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Oct22	Jan23-Oct23	Difference	
TOTAL AGRIFOOD	198 124	228 846	100%	188 717	190 770	2 053	1%
United Kingdom	41 949	47 789	21%	39 450	42 733	3 283	8%
Türkiye	3 569	4 156	2%	3 258	4 093	835	26%
Ukraine	3 109	2 923	1%	2 378	2 825	447	19%
Switzerland	9 858	11 170	5%	9 190	9 583	393	4%
Serbia	1 581	2 163	1%	1 725	1 958	234	14%
China	17 147	15 800	7%	12 681	12 325	- 356	-3%
Iran, Islamic Republic of	873	1 069	0%	982	407	- 576	-59%
Algeria	2 948	3 576	2%	3 073	2 392	- 681	-22%
Egypt	2 183	2 842	1%	2 472	1 614	- 858	-35%
United States	24 516	28 962	13%	24 396	22 540	-1 856	-8%
Other countries	90 391	108 396	47%	89 113	90 301	1 188	1%

TABLE 2

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

TRADING PARTNERS	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Oct22	Jan23-Oct23	Difference	
TOTAL AGRIFOOD	198 124	228 846	100%	188 717	190 770	2 053	1%
United Kingdom	41 949	47 789	21%	39 450	42 733	3 283	8%
United States	24 516	28 962	13%	24 396	22 540	- 1 856	-8%
China	17 147	15 800	7%	12 681	12 325	- 356	-3%
Switzerland	9 858	11 170	5%	9 190	9 583	393	4%
Japan	7 377	8 279	4%	6 816	6 698	- 117	-2%
Russian Federation	7 340	7 119	3%	5 610	5 749	139	2%
Norway	5 412	5 961	3%	4 959	4 996	37	1%
Türkiye	3 569	4 156	2%	3 258	4 093	835	26%
Saudi Arabia	3 631	4 805	2%	3 898	3 823	- 74	-2%
Korea, Republic of	3 939	4 601	2%	3 846	3 760	- 87	-2%
Canada	4 049	4 720	2%	4 030	3 741	- 289	-7%
Morocco	2 368	4 003	2%	3 339	3 218	- 121	-4%
Australia	3 302	3 836	2%	3 203	3 163	- 40	-1%
Ukraine	3 109	2 923	1%	2 378	2 825	447	19%
United Arab Emirates	2 346	3 255	1%	2 670	2 765	95	4%
Other countries	58 213	71 467	31%	58 995	58 761	- 235	0%

TABLE 3

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2021	2022	Share 2022	Jan22-Oct22	Jan23-Oct23		
TOTAL AGRIFOOD	198 124	228 846	100%	188 717	190 770	2 053	1%
Cereal preparations and milling products	18 810	22 918	10%	18 740	20 170	1 429	8%
Preparations of fruit, nuts and vegetables	8 415	10 493	5%	8 482	9 805	1 323	16%
Confectionery and chocolate	8 884	10 251	4%	8 335	9 439	1 104	13%
Tobacco, cigars and cigarettes	5 504	6 153	3%	5 011	6 028	1 017	20%
Coffee, tea, cocoa and spices	6 180	7 353	3%	6 037	6 719	682	11%
Dairy products	16 990	20 363	9%	16 915	16 524	- 391	-2%
Wine and wine based products	16 641	18 268	8%	15 261	14 741	- 520	-3%
Spirits and liqueurs	8 413	9 751	4%	8 321	7 628	- 693	-8%
Pigmeat	14 527	13 832	6%	11 326	10 163	-1 163	-10%
Cereals	11 986	16 861	7%	14 402	12 225	-2 177	-15%
Other products	81 775	92 604	40%	75 886	77 329	1 443	2%

TABLE 4

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2021	2022	Share 2022	Jan22-Oct22	Jan23-Oct23		
TOTAL AGRIFOOD	198 124	228 846	100%	188 717	190 770	2 053	1%
Cereal preparations and milling products	18 810	22 918	10%	18 740	20 170	1 429	8%
Dairy products	16 990	20 363	9%	16 915	16 524	- 391	-2%
Wine and wine based products	16 641	18 268	8%	15 261	14 741	- 520	-3%
Mixed food preparations and ingredients	12 262	14 873	6%	12 230	12 660	431	4%
Cereals	11 986	16 861	7%	14 402	12 225	- 2 177	-15%
Pigmeat	14 527	13 832	6%	11 326	10 163	- 1 163	-10%
Preparations of fruit, nuts and vegetables	8 415	10 493	5%	8 482	9 805	1 323	16%
Confectionery and chocolate	8 884	10 251	4%	8 335	9 439	1 104	13%
Beer, cider and other beverages	10 002	10 891	5%	9 113	9 329	216	2%
Spirits and liqueurs	8 413	9 751	4%	8 321	7 628	- 693	-8%
Other animal products	7 527	8 149	4%	6 760	7 031	271	4%
Vegetables	7 408	8 257	4%	6 454	6 934	480	7%
Pet food and forage crops	7 361	8 620	4%	7 168	6 912	- 256	-4%
Coffee, tea, cocoa and spices	6 180	7 353	3%	6 037	6 719	682	11%
Tobacco, cigars and cigarettes	5 504	6 153	3%	5 011	6 028	1 017	20%
Other products	37 215	41 813	18%	34 161	34 463	302	1%

TABLE 5

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

TRADING PARTNERS	yearly data			monthly data			Difference
	2021	2022	Share 2022	Jan22-Oct22	Jan23-Oct23		
TOTAL AGRIFOOD	130 149	171 487	100%	141 336	132 813	- 8 523	-6%
Türkiye	5 033	5 622	3%	4 523	5 408	885	20%
Egypt	1 181	1 371	1%	1 184	1 668	484	41%
United Kingdom	11 900	15 272	9%	12 472	12 843	371	3%
Côte d'Ivoire	3 259	3 510	2%	2 993	3 360	367	12%
Ecuador	1 623	1 820	1%	1 518	1 778	260	17%
Indonesia	5 649	6 736	4%	5 504	4 721	- 784	-14%
Australia	1 901	3 774	2%	3 292	2 286	-1 006	-31%
China	6 110	9 787	6%	8 083	6 994	-1 089	-13%
Argentina	5 171	6 943	4%	5 663	4 026	-1 637	-29%
Brazil	13 548	20 173	12%	16 932	14 773	-2 160	-13%
Other countries	74 776	96 479	56%	79 170	74 956	-4 214	-5%

TABLE 6

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

TRADING PARTNERS	yearly data			monthly data			Difference
	2021	2022	Share 2022	Jan22-Oct22	Jan23-Oct23		
TOTAL AGRIFOOD	130 149	171 487	100%	141 336	132 813	- 8 523	-6%
Brazil	13 548	20 173	12%	16 932	14 773	- 2 160	-13%
United Kingdom	11 900	15 272	9%	12 472	12 843	371	3%
Ukraine	6 927	13 214	8%	9 556	9 656	100	1%
United States	9 254	12 251	7%	10 147	9 586	- 561	-6%
China	6 110	9 787	6%	8 083	6 994	- 1 089	-13%
Türkiye	5 033	5 622	3%	4 523	5 408	885	20%
Indonesia	5 649	6 736	4%	5 504	4 721	- 784	-14%
Argentina	5 171	6 943	4%	5 663	4 026	- 1 637	-29%
Switzerland	4 523	4 848	3%	3 983	3 989	6	0%
Côte d'Ivoire	3 259	3 510	2%	2 993	3 360	367	12%
India	2 921	3 655	2%	3 124	2 816	- 308	-10%
Viet Nam	2 222	3 445	2%	2 894	2 762	- 132	-5%
Morocco	2 639	3 261	2%	2 717	2 558	- 159	-6%
South Africa	2 293	2 621	2%	2 360	2 557	197	8%
Peru	2 711	3 402	2%	2 742	2 475	- 266	-10%
Other countries	45 989	56 746	33%	47 643	44 290	- 3 353	-7%

TABLE 7

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Oct22	Jan23-Oct23	Difference	
TOTAL AGRIFOOD	130 149	171 487	100%	141 336	132 813	- 8 523	-6%
Tobacco, cigars and cigarettes	2 306	3 713	2%	2 868	3 882	1 014	35%
Sugar and isoglucose	878	1 400	1%	905	1 735	831	92%
Vegetables	4 283	5 069	3%	4 173	4 775	602	14%
Olives and olive oil	636	802	0%	598	941	343	57%
Cereals	6 189	12 755	7%	9 645	9 975	330	3%
Margarine and other oils and fats (vegetable)	3 931	5 116	3%	4 377	3 307	-1 070	-24%
Coffee, tea, cocoa and spices	16 946	21 970	13%	18 393	17 129	-1 264	-7%
Non-edible for technical use	7 489	11 523	7%	9 590	7 956	-1 634	-17%
Vegetable oils (oilseeds and palm)	8 239	11 048	6%	9 320	6 520	-2 800	-30%
Oilseeds and protein crops	18 251	25 712	15%	21 281	17 893	-3 388	-16%
Other products	61 000	72 378	42%	60 187	58 700	-1 487	-2%

TABLE 8

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Oct22	Jan23-Oct23	Difference	
TOTAL AGRIFOOD	130 149	171 487	100%	141 336	132 813	- 8 523	-6%
Fruit and nuts	20 721	22 233	13%	18 711	18 438	- 273	-1%
Oilseeds and protein crops	18 251	25 712	15%	21 281	17 893	- 3 388	-16%
Coffee, tea, cocoa and spices	16 946	21 970	13%	18 393	17 129	- 1 264	-7%
Cereals	6 189	12 755	7%	9 645	9 975	330	3%
Non-edible for technical use	7 489	11 523	7%	9 590	7 956	- 1 634	-17%
Vegetable oils (oilseeds and palm)	8 239	11 048	6%	9 320	6 520	- 2 800	-30%
Preparations of fruit, nuts and vegetables	5 420	6 526	4%	5 346	5 421	75	1%
Mixed food preparations and ingredients	5 594	6 700	4%	5 648	5 057	- 591	-10%
Vegetables	4 283	5 069	3%	4 173	4 775	602	14%
Other animal products	4 669	6 098	4%	4 990	4 570	- 420	-8%
Cereal preparations and milling products	3 858	4 839	3%	3 993	4 006	13	0%
Tobacco, cigars and cigarettes	2 306	3 713	2%	2 868	3 882	1 014	35%
Spirits and liqueurs	3 301	4 417	3%	3 540	3 812	272	8%
Margarine and other oils and fats (vegetable)	3 931	5 116	3%	4 377	3 307	- 1 070	-24%
Pet food and forage crops	2 765	3 513	2%	2 924	2 635	- 289	-10%
Other products	16 185	20 253	12%	16 538	17 437	899	5%

TABLE 9

EU AGRIFOOD TRADE BALANCE (million EUR)

TRADE BALANCE			
AGRI-FOOD CATEGORIES/PERIOD	Exports Jan23- Oct23	Imports Jan23- Oct23	Trade balance Jan23-Oct23
	million EUR		
TOTAL AGRIFOOD	190,770	132,813	57 957
Cereal preparations and milling products	20 170	4 006	16 164
Dairy products	16 524	1 795	14 729
Wine and wine based products	14 741	1 327	13 414
Pigmeat	10 163	335	9 828
Mixed food preparations and ingredients	12 660	5 057	7 603
Beer, cider and other beverages	9 329	2 033	7 296
Confectionery and chocolate	9 439	2 499	6 940
Preparations of fruit, nuts and vegetables	9 805	5 421	4 384
Pet food and forage crops	6 912	2 635	4 278
Spirits and liqueurs	7 628	3 812	3 816
Olives and olive oil	4 136	941	3 195
Poultry and eggs	4 969	1 964	3 005
Other animal products	7 031	4 570	2 461
Cereals	12 225	9 975	2 250
Vegetables	6 934	4 775	2 159
Tobacco, cigars and cigarettes	6 028	3 882	2 145
Horticulture	3 721	1 709	2 012
Beef and veal	3 835	2 048	1 787
Unspecified	1 250	0	1 250
Sheep and goat	572	1 051	- 479
Sugar and isoglucose	553	1 735	-1 182
Margarine and other oils and fats (vegetable)	1 826	3 307	-1 481
Vegetable oils (oilseeds and palm)	3 067	6 520	-3 453
Non-edible for technical use	3 648	7 956	-4 308
Coffee, tea, cocoa and spices	6 719	17 129	-10 411
Fruit and nuts	4 790	18 438	-13 648
Oilseeds and protein crops	2 096	17 893	-15 797
<i>For info: fish and fish products</i>	<i>6 232</i>	<i>25 090</i>	<i>-18 859</i>
<i>Total agrifood and fish</i>	<i>197 002</i>	<i>157 903</i>	<i>39 099</i>



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