



European  
Commission



# MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS in July 2023  
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## Note to the reader

The latest available consolidated trade data at EU level cover market developments in July 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).

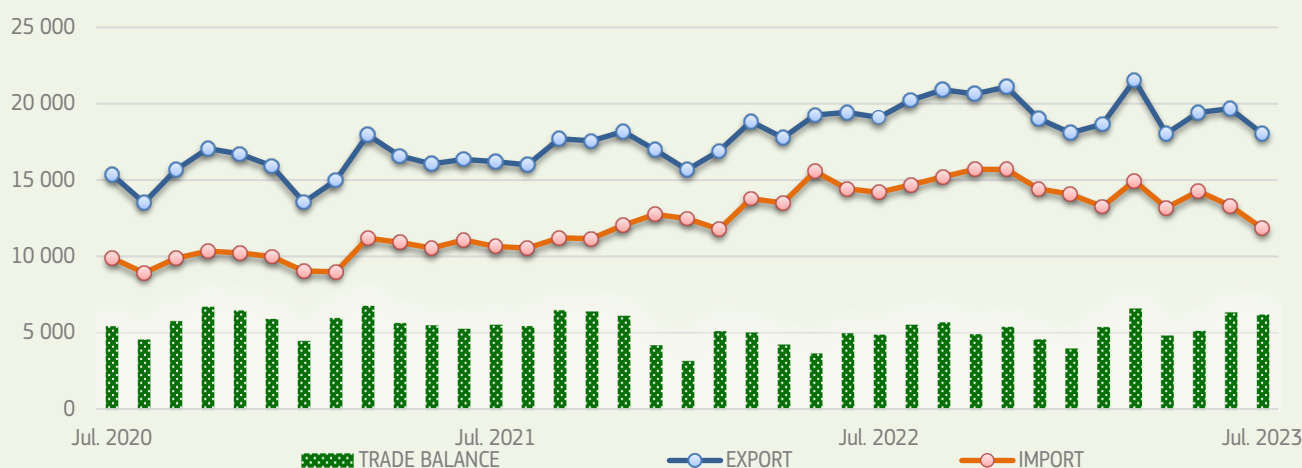
# HIGHLIGHTS: EU agri-food slowed down in July 2023, but trade surplus remained stable

Despite a reduction of both imports and exports, EU agri-food trade balance remained stable month-on-month at +EUR 6.2 billion in July 2023. The cumulative trade balance (January to July 2023) reached +EUR 38.6 billion, EUR 7.3 billion higher compared to the same period in 2022.

EU exports declined by 8% month-on-month and reached EUR 18 billion in July 2023, 5% lower than in July 2022. Cumulative exports reached EUR 133.5 billion and remained 5% higher compared to the same period in 2022, with increases in particular for cereal preparations and preparations of fruit and nuts.

EU imports continued to decrease in July to EUR 11.8 billion, a 11% reduction month-on-month and 17% below their 2022 level. Cumulative imports (from January to July 2023) reached EUR 94.9 billion, at a similar level than in 2022, with increases in imports of cereals and reductions in imports of oilseeds and protein crops as well as vegetable oils.

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



Source: Comext



# EU AGRI-FOOD EXPORTS

## EU AGRI-FOOD EXPORTS IN JULY BELOW THEIR 2022 LEVEL

**EU agri-food exports** decreased by 8% month-on-month in July 2023, to reach **EUR 18 billion**. For the first time of the year, they fall below their level a year prior, 5% below July 2022. This appears to be mostly explained by reduced export volumes, while export prices remain high.

Nonetheless, cumulative exports from January to July 2023 reached EUR 133.5 billion and remained EUR 6.5 billion (+5%) higher than for the same period last year.

Exports to **UK** remained at a high level, with a +EUR 2.7 billion increase (+10%) between January and July 2023 compared to the same period last year. Cereals preparations, preparations of fruits and vegetables and pigmeat are the categories that saw the largest increases (mostly due to higher prices).

A significant increase of exports to **Türkiye** can also be noticed, with +EUR 846 million (+38%). This increase is explained by the large increase of beef exports (both in live animal and meat), from EUR 16 million between January and July 2022 to EUR 348 million in 2023. Increases in exports of oilseeds and protein crops, coffee and cocoa, as well as pet food and forage crops are also significant.

Exports to the US remained 7% below their 2022 level (-EUR 1.2 billion), mostly due to reduced exports of spirits and liqueurs compared to the two last years.

EU exports continued to be reduced in direction of **Egypt**, with -31% (-EUR 486 million), as well as to **Iran** (-EUR 339 million, -52%) and **Tunisia** (-EUR 274 million, -37%).

## EXPORT VOLUMES HAVE DECREASED, EXCEPT FOR CROPS

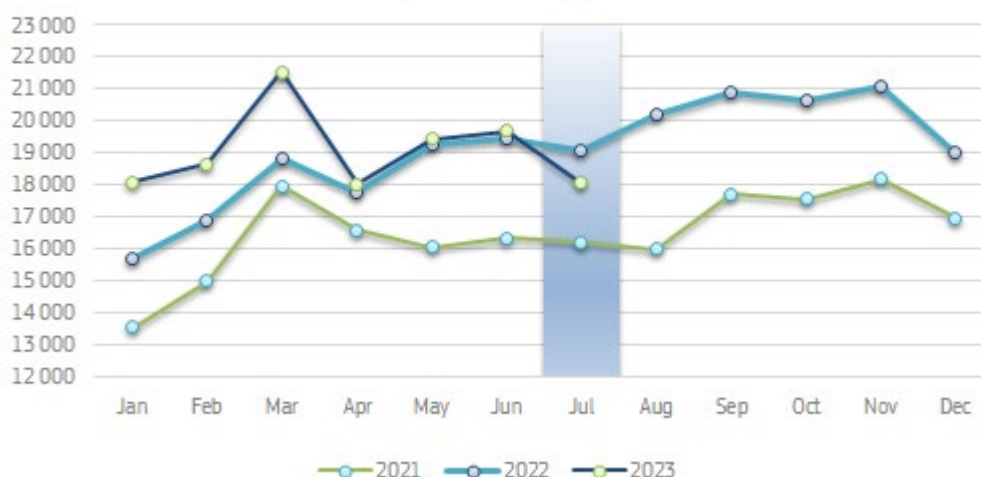
Exports of **cereal preparations and milling products** remained high between January and July 2023 compared to 2022 (+EUR 1.5 billion, +12%), as well as those of **preparations of fruit and vegetables** (+EUR 1.2 billion, +21%) and **confectionary and chocolate** (+EUR 864 million, +16%), mostly due to high prices.

Volumes exported of **vegetable oils, oilseeds and protein crops** and **cereals** increased by 35%, 16% and 11% respectively compared to 2022. Despite this increase in volumes, the total value of cereals exports declined due to lower prices.

Export values decreased for **pigmeat** (-EUR 455 million, -6%), **spirits and liqueurs** (-EUR 259 million, -5%) and **olives and olive oil** (-EUR 97 million, -3%), with even larger reductions in volumes.

Exports of **sugar** decreased by 32% in volume, but this was compensated by higher export prices, resulting in a stable export value. A similar situation is observed for exports of **pet food and forage crops**, as well as **vegetables**, with decreases of respectively 18% and 15% in volume but increases in value.

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



# EU AGRI-FOOD IMPORTS

## EU IMPORTS CONTINUED TO DECREASE IN JULY

EU **agri-food imports continued to decrease** in July, at EUR 11.8 billion, a 11% reduction month-on-month and 17% reduction compared to July 2022. This evolution of the value of imports is explained by a decrease of import prices since the beginning of 2023, combined with the reduction of import volumes in July. Cumulatively, imports from January to July 2023 reached EUR 94.9 billion and remained stable compared to the same period last year (-1%, -EUR 814 million).

Imports from **Ukraine** increased by EUR 1.8 billion between January and July 2023 compared to 2022, mainly in cereals. Imports also increased from **Türkiye**, with a +EUR 483 million (+15%) increase, and from **Egypt**, with a +EUR 448 million (+49%) increase, in both cases explained by a rise of vegetables and fruits and nuts imports.

Imports from **Argentina** decreased by EUR 1 billion (-27%), in large part due to a reduction of soya meals imports. Imports from **Brazil** also decreased by EUR 892 million (-8%), with a large decrease in soya beans and coffee, partly compensated by a rise of soya meals and sugar imports. Imports from **Australia** were reduced by EUR 771 million (-28%), mostly due to a reduction of rapeseed imports.

## TRADE BALANCE IN OILSEEDS IMPROVED

After 11 months of high imports compared to the previous years, volumes of **cereals** imported in July 2023 were back at the same level than in July 2022, with 2.3 million tons. Cumulatively since January, **cereal** imports remained +EUR 1.6 billion (+29%) higher than in 2022.

**Sugar** imports have remained high (+EUR 760 million, +140%), as well as those of **tobacco products** (+EUR 847 million, +47%) and **vegetables** (+EUR 605 million, +19%).

Imports of **oilseeds and protein crops** have decreased by EUR 1.7 billion (-11%) between January and July 2023 compared to 2022, due to lower prices but also lower import volumes (-7%). Combined with the increase of exports, this led to a reduction of the trade deficit in oilseeds and protein crops from -EUR 13.6 billion in 2022 (January to July) to -EUR 11.8 billion in 2023.

A similar situation can be observed for **vegetable oils**, for which imports decreased by EUR 1.6 billion (-27%) and by 7% in volume compared to the same period in 2022. With the increase in exports, this resulted in an improvement of the trade balance for vegetable oils from -EUR 4 billion in January-July 2022 to -EUR 2.2 billion in 2023.

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

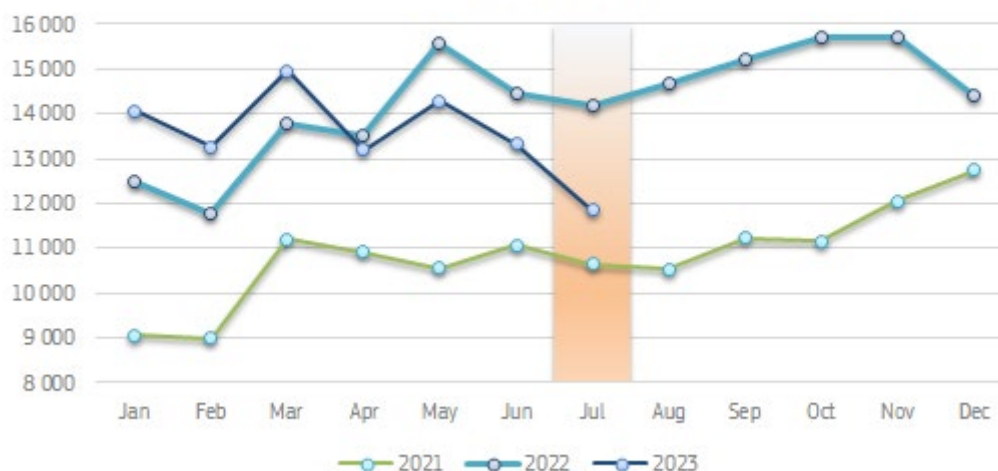


TABLE 1

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Jul22	Jan23-Jul23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>198 124</b>	<b>228 899</b>	<b>100%</b>	<b>126 978</b>	<b>133 498</b>	<b>6 520</b>	<b>5%</b>
United Kingdom	41 949	47 766	21%	27 009	29 753	2 743	10%
Türkiye	3 569	4 154	2%	2 209	3 055	846	38%
China	17 147	15 793	7%	8 256	8 880	624	8%
Russian Federation	7 340	7 128	3%	3 591	4 061	469	13%
Ukraine	3 109	2 925	1%	1 578	1 953	375	24%
Canada	4 049	4 723	2%	2 647	2 432	- 215	-8%
Tunisia	558	1 071	0%	735	462	- 274	-37%
Iran, Islamic Republic of	873	1 070	0%	650	311	- 339	-52%
Egypt	2 183	2 843	1%	1 554	1 068	- 486	-31%
United States	24 516	28 977	13%	16 788	15 543	-1 244	-7%
Other countries	92 831	112 449	49%	61 960	65 980	4 021	6%

TABLE 2

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Jul22	Jan23-Jul23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>198 124</b>	<b>228 899</b>	<b>100%</b>	<b>126 978</b>	<b>133 498</b>	<b>6 520</b>	<b>5%</b>
United Kingdom	41 949	47 766	21%	27 009	29 753	2 743	10%
United States	24 516	28 977	13%	16 788	15 543	- 1 244	-7%
China	17 147	15 793	7%	8 256	8 880	624	8%
Switzerland	9 858	11 181	5%	6 460	6 815	355	5%
Japan	7 377	8 295	4%	4 689	4 839	149	3%
Russian Federation	7 340	7 128	3%	3 591	4 061	469	13%
Norway	5 412	5 889	3%	3 343	3 463	120	4%
Türkiye	3 569	4 154	2%	2 209	3 055	846	38%
Korea, Republic of	3 939	4 606	2%	2 759	2 689	- 71	-3%
Saudi Arabia	3 631	4 815	2%	2 398	2 644	246	10%
Canada	4 049	4 723	2%	2 647	2 432	- 215	-8%
Morocco	2 368	4 008	2%	2 466	2 354	- 112	-5%
Australia	3 302	3 835	2%	2 143	2 187	44	2%
Ukraine	3 109	2 925	1%	1 578	1 953	375	24%
Algeria	2 948	3 602	2%	2 104	1 910	- 194	-9%
Other countries	57 610	71 202	31%	38 536	40 919	2 383	6%

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-Jul22	Jan23-Jul23		
<b>TOTAL AGRIFOOD</b>	<b>198 124</b>	<b>228 899</b>	<b>100%</b>	<b>126 978</b>	<b>133 498</b>	<b>6 520</b>	<b>5%</b>
Cereal preparations and milling products	18 810	22 916	10%	12 469	13 925	1 456	12%
Preparations of fruit, nuts and vegetables	8 415	10 495	5%	5 621	6 816	1 195	21%
Confectionery and chocolate	8 884	10 245	4%	5 277	6 141	864	16%
Tobacco, cigars and cigarettes	5 504	6 153	3%	3 298	4 108	810	25%
Coffee, tea, cocoa and spices	6 180	7 352	3%	4 040	4 697	657	16%
Non-edible for technical use	4 171	4 821	2%	2 748	2 702	- 46	-2%
Olives and olive oil	4 023	5 036	2%	2 904	2 807	- 97	-3%
Spirits and liqueurs	8 413	9 744	4%	5 465	5 206	- 259	-5%
Pigmeat	14 527	13 782	6%	7 619	7 164	- 455	-6%
Cereals	11 986	16 861	7%	9 428	8 870	- 559	-6%
Other products	107 211	121 496	53%	68 108	71 062	2 954	4%

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-Jul22	Jan23-Jul23		
<b>TOTAL AGRIFOOD</b>	<b>198 124</b>	<b>228 899</b>	<b>100%</b>	<b>126 978</b>	<b>133 498</b>	<b>6 520</b>	<b>5%</b>
Cereal preparations and milling products	18 810	22 916	10%	12 469	13 925	1 456	12%
Dairy products	16 990	20 363	9%	11 391	11 719	328	3%
Wine and wine based products	16 641	18 254	8%	10 241	10 278	37	0%
Cereals	11 986	16 861	7%	9 428	8 870	- 559	-6%
Mixed food preparations and ingredients	12 262	14 871	6%	8 395	8 819	425	5%
Pigmeat	14 527	13 782	6%	7 619	7 164	- 455	-6%
Preparations of fruit, nuts and vegetables	8 415	10 495	5%	5 621	6 816	1 195	21%
Beer, cider and other beverages	10 002	10 916	5%	6 259	6 618	359	6%
Confectionery and chocolate	8 884	10 245	4%	5 277	6 141	864	16%
Spirits and liqueurs	8 413	9 744	4%	5 465	5 206	- 259	-5%
Vegetables	7 408	8 261	4%	4 484	5 022	538	12%
Other animal products	7 527	8 193	4%	4 452	4 904	452	10%
Pet food and forage crops	7 361	8 572	4%	4 843	4 847	3	0%
Coffee, tea, cocoa and spices	6 180	7 352	3%	4 040	4 697	657	16%
Tobacco, cigars and cigarettes	5 504	6 153	3%	3 298	4 108	810	25%
Other products	37 215	41 922	18%	23 695	24 364	669	3%

TABLE 5

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2021	2022	Share 2022	Jan22-Jul22	Jan23-Jul23		
<b>TOTAL AGRIFOOD</b>	<b>130 148</b>	<b>171 457</b>	<b>100%</b>	<b>95 738</b>	<b>94 924</b>	<b>- 814</b>	<b>-1%</b>
Ukraine	6 927	13 204	8%	5 356	7 153	1 797	34%
Türkiye	5 033	5 623	3%	3 147	3 630	483	15%
Egypt	1 181	1 371	1%	908	1 355	448	49%
United Kingdom	11 900	15 255	9%	8 374	8 817	443	5%
Canada	2 834	2 973	2%	1 446	1 813	367	25%
Philippines	1 019	1 513	1%	991	525	- 466	-47%
Russian Federation	2 175	2 313	1%	1 532	1 054	- 479	-31%
Australia	1 901	3 759	2%	2 729	1 958	- 771	-28%
Brazil	13 548	20 173	12%	11 289	10 397	- 892	-8%
Argentina	5 171	6 952	4%	3 809	2 793	-1 016	-27%
Other countries	78 459	98 322	57%	56 157	55 430	- 727	-1%

TABLE 6

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2021	2022	Share 2022	Jan22-Jul22	Jan23-Jul23		
<b>TOTAL AGRIFOOD</b>	<b>130 148</b>	<b>171 457</b>	<b>100%</b>	<b>95 738</b>	<b>94 924</b>	<b>- 814</b>	<b>-1%</b>
Brazil	13 548	20 173	12%	11 289	10 397	- 892	-8%
United Kingdom	11 900	15 255	9%	8 374	8 817	443	5%
Ukraine	6 927	13 204	8%	5 356	7 153	1 797	34%
United States	9 254	12 249	7%	6 884	6 748	- 136	-2%
China	6 110	9 794	6%	5 313	5 005	- 308	-6%
Türkiye	5 033	5 623	3%	3 147	3 630	483	15%
Indonesia	5 649	6 709	4%	3 465	3 335	- 131	-4%
Argentina	5 171	6 952	4%	3 809	2 793	- 1 016	-27%
Switzerland	4 523	4 848	3%	2 721	2 707	- 13	0%
Côte d'Ivoire	3 259	3 509	2%	2 080	2 428	348	17%
Morocco	2 639	3 256	2%	2 288	2 168	- 120	-5%
India	2 921	3 662	2%	2 126	2 044	- 82	-4%
Australia	1 901	3 759	2%	2 729	1 958	- 771	-28%
Viet Nam	2 222	3 451	2%	1 942	1 946	4	0%
Canada	2 834	2 973	2%	1 446	1 813	367	25%
Other countries	46 258	56 040	33%	32 770	31 983	- 787	-2%



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-Jul22	Jan23-Jul23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>130 148</b>	<b>171 457</b>	<b>100%</b>	<b>95 738</b>	<b>94 924</b>	<b>- 814</b>	<b>-1%</b>
Cereals	6 189	12 736	7%	5 558	7 195	1 636	29%
Tobacco, cigars and cigarettes	2 306	3 708	2%	1 805	2 652	847	47%
Sugar and isoglucose	878	1 399	1%	541	1 301	760	140%
Vegetables	4 283	5 069	3%	3 119	3 725	606	19%
Spirits and liqueurs	3 301	4 415	3%	2 288	2 616	327	14%
Mixed food preparations and ingredients	5 593	6 704	4%	3 961	3 550	- 411	-10%
Margarine and other oils and fats (vegetable)	3 931	5 109	3%	3 066	2 372	- 695	-23%
Non-edible for technical use	7 489	11 518	7%	6 188	5 463	- 725	-12%
Vegetable oils (oilseeds and palm)	8 239	11 027	6%	6 166	4 524	-1 643	-27%
Oilseeds and protein crops	18 251	25 708	15%	14 999	13 289	-1 710	-11%
Other products	69 686	84 063	49%	48 045	48 239	194	0%

TABLE 8

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Jul22	Jan23-Jul23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>130 148</b>	<b>171 457</b>	<b>100%</b>	<b>95 738</b>	<b>94 924</b>	<b>- 814</b>	<b>-1%</b>
Oilseeds and protein crops	18 251	25 708	15%	14 999	13 289	- 1 710	-11%
Fruit and nuts	20 721	22 226	13%	13 090	13 171	81	1%
Coffee, tea, cocoa and spices	16 945	21 960	13%	12 671	12 381	- 290	-2%
Cereals	6 189	12 736	7%	5 558	7 195	1 636	29%
Non-edible for technical use	7 489	11 518	7%	6 188	5 463	- 725	-12%
Vegetable oils (oilseeds and palm)	8 239	11 027	6%	6 166	4 524	- 1 643	-27%
Vegetables	4 283	5 069	3%	3 119	3 725	606	19%
Preparations of fruit, nuts and vegetables	5 420	6 526	4%	3 592	3 691	99	3%
Mixed food preparations and ingredients	5 593	6 704	4%	3 961	3 550	- 411	-10%
Other animal products	4 669	6 084	4%	3 371	3 355	- 16	0%
Cereal preparations and milling products	3 858	4 865	3%	2 747	2 769	21	1%
Tobacco, cigars and cigarettes	2 306	3 708	2%	1 805	2 652	847	47%
Spirits and liqueurs	3 301	4 415	3%	2 288	2 616	327	14%
Margarine and other oils and fats (vegetable)	3 931	5 109	3%	3 066	2 372	- 695	-23%
Pet food and forage crops	2 765	3 515	2%	2 021	1 850	- 171	-8%
Other products	16 185	20 288	12%	11 095	12 324	1 229	11%

TABLE 9

## AGRI-FOOD TRADE BALANCE (MILLION EUR)

TRADE BALANCE			
PRODUCT/PERIOD	Exports Jan23- Jul23	Imports Jan23- Jul23	Trade balance Jan23-Jul23
	million EUR		
<b>TOTAL AGRIFOOD</b>	<b>133 498</b>	<b>94 924</b>	<b>38 574</b>
Cereal preparations and milling products	13 925	2 769	11 157
Dairy products	11 719	1 302	10 417
Wine and wine based products	10 278	892	9 386
Pigmeat	7 164	227	6 936
Mixed food preparations and ingredients	8 819	3 550	5 269
Beer, cider and other beverages	6 618	1 434	5 184
Confectionery and chocolate	6 141	1 681	4 461
Preparations of fruit, nuts and vegetables	6 816	3 691	3 125
Pet food and forage crops	4 847	1 850	2 996
Spirits and liqueurs	5 206	2 616	2 591
Olives and olive oil	2 807	574	2 233
Poultry and eggs	3 467	1 411	2 056
Horticulture	8 870	7 195	1 675
Other animal products	4 904	3 355	1 549
Tobacco, cigars and cigarettes	2 712	1 249	1 463
Cereals	4 108	2 652	1 456
Vegetables	5 022	3 725	1 297
Beef and veal	2 650	1 456	1 194
Unspecified	781	0	781
Sheep and goat	414	797	- 383
Sugar and isoglucose	346	1 301	- 956
Margarine and other oils and fats (vegetable)	1 268	2 372	-1 104
Vegetable oils (oilseeds and palm)	2 306	4 524	-2 218
Non-edible for technical use	2 702	5 463	-2 761
Coffee, tea, cocoa and spices	4 697	12 381	-7 684
Fruit and nuts	3 389	13 171	-9 782
Oilseeds and protein crops	1 522	13 289	-11 766
<i>For info: fish and fish products</i>	<i>4 271</i>	<i>17 478</i>	<i>-13 206</i>
<i>Total agrifood and fish</i>	<i>137 769</i>	<i>112 402</i>	<i>25 367</i>



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