



European  
Commission



# MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS IN MAY 2022  
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## Note to the reader

The latest available consolidated trade data at EU level cover market developments until May 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.

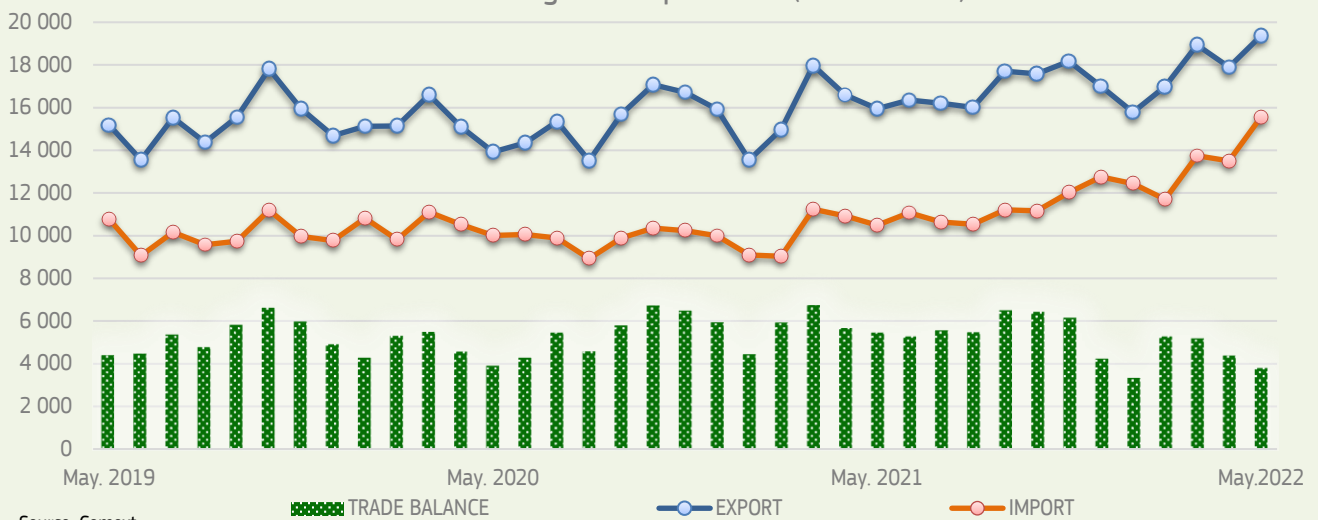
The trade figures are expressed in values, except when specifically mentioned. The unit value is the average price of products traded in the period concerned (trade value at the border divided by quantity registered).

# HIGHLIGHTS: SHARP INCREASE IN TRADE VALUES IN MAY 2022

**EU total agri-food trade** (exports + imports) in May elevated at **EUR 34.9 billion**. It is a EUR 3.5 billion increase month-to-month (+11%). It is coming from a price effect for most of the commodities. Trade intensified with the 20 main EU partners, except for two countries (Morocco and Turkey). EU agri-food trade with Brazil and the US were the most dynamic month-to-month.

EU **exports** reached **EUR 19.4 billion**, +8% compared to the previous month and +21% compared to May 2021, despite lower cereal exports in volumes. Since the beginning of the year, EU exports are on the high range (+16% compared to the three-year average). EU **imported €15.6 billion** in May, +15% compared to the previous month and 48% higher than May 2021. Significantly higher imported volumes of maize and higher value of coffee and nuts have weighed the EU import bill.

EU trade of agri-food products (million EUR)



Source: Comext



# EU AGRI-FOOD EXPORTS

## DYNAMIC EU EXPORTS IN MAY

In May 2022, EU agri-food exports increased by 8% month-to-month, to reach EUR 19.4 billion. The sharp increase in export value is due to the high commodity prices.

Total EU agri-food exports to the **MENA region** remained stable month-to-month but were still 44% higher compared to May 2021. Cereals and cereals preparations exports reached EUR 919 million (+75% year-to-year). Both quantity exported and total value increased. Particularly, wheat exports increased by 35% compared to May 2021 (+625% in Morocco, +208% in Tunisia).

EU exports to **Ukraine** continued to increase by 27% month-to-month, to reach pre-war levels at EUR 233 million. Notably, vegetables and pigmeat exports to Ukraine exceeded last year's figures, in both value and volume terms (+102% and 148% respectively in volumes).

### Trade developments in January-May 2022

EU exports are mainly targeting the UK, the US and China. While exports to UK and US are dynamic, exports to China are still low.

EU exports to **sub-saharan Africa** increased by 15% year-to-year in the January-May 2022 period and reached EUR 4.6 billion. This is largely due to the increase in global commodity prices but also to the increase in volumes for agricultural commodities as sunflower oil (+972% year-to-year), white sugar

(+65%) and maize (+56%). For other crops, like wheat and other coarse grains, EU exports declined by 33% and 19%, respectively. For animal products, exports of fresh dairy products and pigmeat increased in the period.

EU exports to **the UK** were 21% higher in the January-May 2022 compared 2021. This was led by a sharp increase in cereals preparations (+22%, +EUR 334 million year-to-year), wine (+17%, +EUR 182 million) and poultry meat (+48%, +176 million).

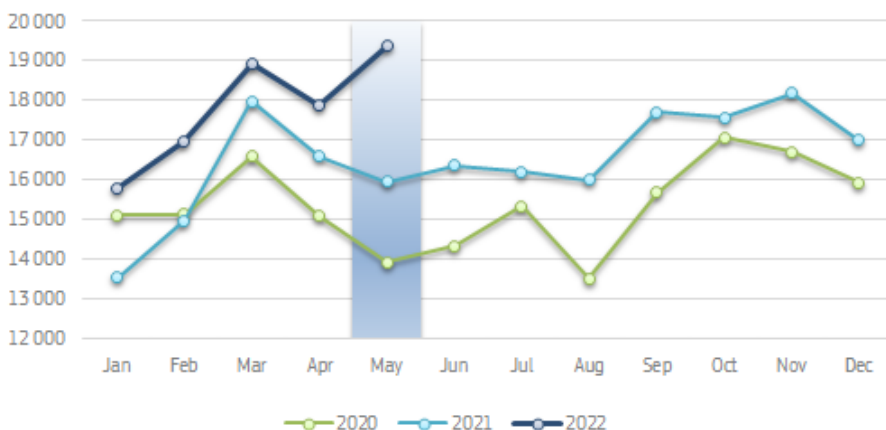
EU exports to **China** are still on the low levels, at EUR 5.7 billion over the period. A 29% decrease year-to-year.

## CEREALS AND DAIRY PRODUCTS ON TOP OF EU EXPORTS

From January to May 2022, EU **cereals** exports increased the most (+33%, +EUR 1.5 billion year-to-year), followed by **cereal preparations and milling products** (+18%, +EUR 1.3 billion). Similarly to **Dairy products** (+16%, +EUR 1.1 billion), this increase was only a value driven increase.

Exports of **butter** increased both in value and volumes (+37% and +6%, respectively). On the contrary, exports of **milk powders** (whey, SMP and WMP) increased in value but not in volumes. **Fatty acids and waxes** are also dynamic (+116% year-to-year) and are primarily exported to the UK, China and Turkey.

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



# EU AGRI-FOOD IMPORTS

## EU IMPORTS AT RECORD LEVELS

EU imports in May peaked at EUR 15.6 billion, 15% increase compared to April. This is one of the most significant increases month-to-month since 2000, and following an important increase (+17%) already in March 2022.

EU imports from **Brazil** increased by 41% in May compared to April from a quantity and price effect. It is also 84% higher than May 2021. EU imports increased mainly for oilseeds (+EUR 459 million month-to-month) and cereals (+EUR 72 million). Imported quantity increased as well by 39% and 268%, respectively. Imported volumes of maize and palm oil also increased substantially.

EU imports in May from **Ukraine** increased by 36%, to reach EUR 665 million. The biggest increase came from oilseeds (+83%) and cereals (+67%) and was largely quantity driven. EU imports of poultry and eggs also increased substantially in May at a lower price. Imported volumes rose 106% while the unit price fell by 4%, month-to-month.

### Trade developments in January-May 2022

Looking at the period Jan-May 2022, EU imports from Brazil, the United Kingdom and China increased the most year-to-year. Import values increased respectively by 52%, 40% and 69%.

Cumulative monthly imports from **China** reached EUR 3.7 billion in Jan-May 2022, led by fatty acids and waxes and pet food reaching EUR 476 million (+144% year-to-year) and EUR 343 million (+80%), respectively. Soya meal imports were also

dynamic (+424%) as well as poultry meat preparations (+131%) and honey (+114%). These increases were also led by a rise in import quantities.

Imports from **Australia** increased by 124% in Jan-May 2022 compared to last year. EU imports reached EUR 1.9 billion. Main imports are for rapeseed (EUR 1.4 billion, +206% year-to-year), wool and silk (EUR 97 million, +104%) and wine (EUR 90 million, +11%).

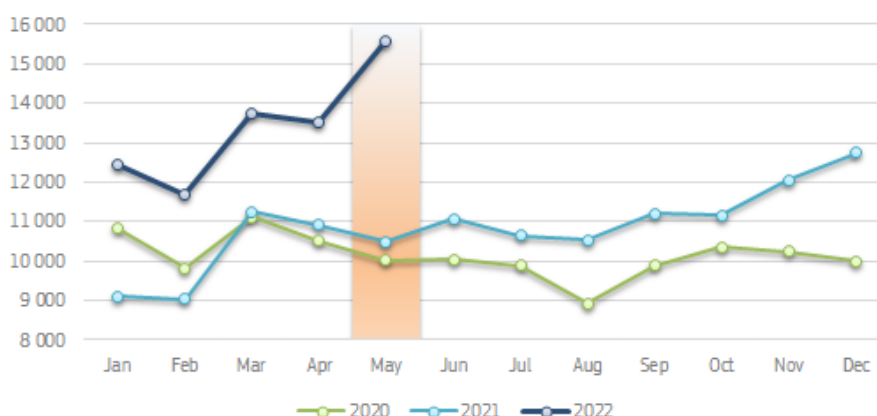
## COFFEE, NUTS AND MAIZE AFFECTS EU IMPORT BILL

EU import bill has been affected by **coffee** imports. They raised by EUR 2 billion in the period Jan-May 2022 compared to last year. Similarly, **maize** imports increased significantly (+EUR 1.1 billion) during the period. While maize imports also increased in quantity (+44%), coffee imports were largely due to a price increase (only 7% increase in volumes).

EU imports of **fruit and nuts** also increased significantly (+8% year-to-year) to reach EUR 9.3 billion. EU import value increased for nuts and decreased mainly for peaches and nectarines and apples and pears. Increased volumes of nuts mainly came from the US, Turkey and Vietnam.

**Apples and pears** as well as **peaches and nectarines** decreased in value but increased in volume imported (+2% and +9%, respectively). Imports from South Africa increased the most for these fruits.

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



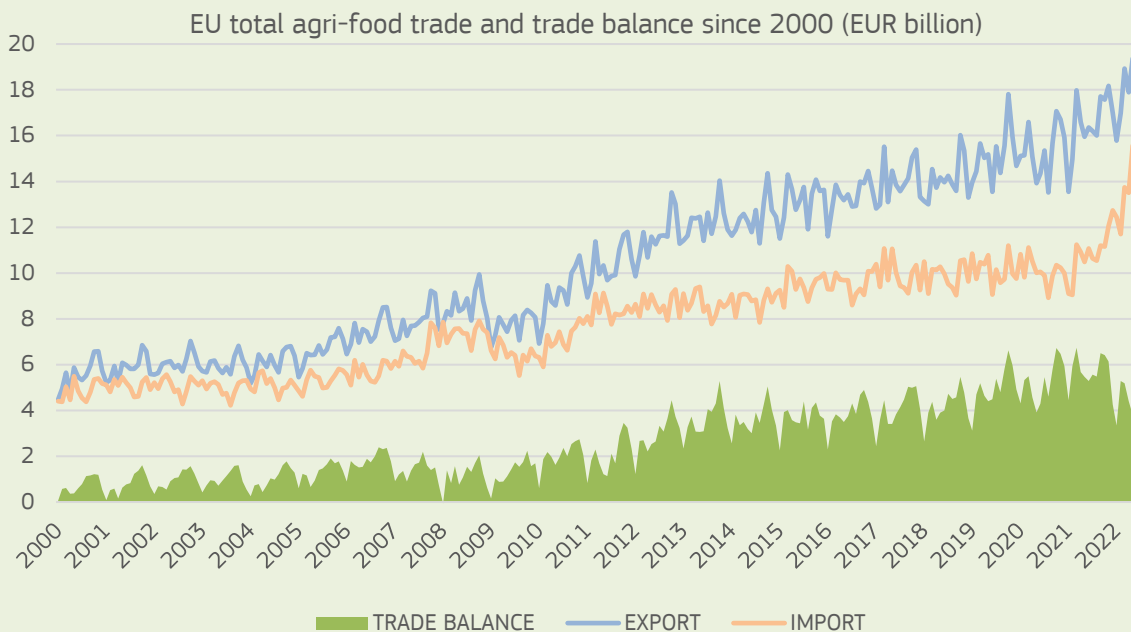
# FOCUS

## Evolution of EU agri-food trade balance since 2000

EU agri-trade flows have been increasing at different pace since 2000. As shown in the graph below, the first five years were characterized by stable agri-food flows between the EU and the rest of the world. Starting in 2005, EU exports and imports increased notably the exports of cereals, food and fruit preparations and the imports of coffee, tea and spices as well as vegetable oils. Overall, the trade balance remained relatively stable until 2011.

Starting in 2011, EU exports value increased slightly faster than imports with the increase in the export value of cereals preparations and milling products, dairy products and pigmeat. Wine and wine-based products also increased but in a more variable manner. While the imports of fruit and nuts continued to increase, the two other most important imported agri-food products (coffee, tea & spices and oilseeds & protein crops) remained relatively stable over the period. This allowed EU agri-food trade surplus to grow.

Since early 2021, EU trade flows have surged to reach EUR 34.9 billion in May 2022 (+54% compared to January 2021) due notably to the significant world price increase of agricultural commodities. EU trade balance worsened in this period, from EUR 4.5 billion at the beginning of the period to EUR 3.8 billion in May 2022 due to the high rise of the EU import bill. This increase in imports have been mainly due to an important rise in the imports of oilseeds, cereals, coffee and vegetable oils. The unit value increased the most for beef and veal imports and margarine & other oils and fats (including palm kernel oil).



**TABLE 1**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-May21	Jan22-May22	Difference	
<b>TOTAL AGRIFOOD</b>	<b>184 467</b>	<b>198 086</b>	<b>100%</b>	<b>79 043</b>	<b>88 971</b>	<b>9 928</b>	<b>13%</b>
United Kingdom	41 962	41 943	21%	15 907	19 200	3 293	21%
United States	21 447	24 509	12%	9 510	11 578	2 068	22%
Switzerland	9 030	9 844	5%	4 176	4 738	562	13%
Morocco	2 165	2 366	1%	1 132	1 642	510	45%
Korea, Republic of	3 029	3 939	2%	1 458	1 957	500	34%
Cambodia	252	419	0%	193	78	- 116	-60%
Ukraine	2 841	3 107	2%	1 236	1 029	- 206	-17%
Hong Kong	2 541	2 157	1%	916	699	- 217	-24%
Russian Federation	6 841	7 356	4%	2 979	2 598	- 382	-13%
China	17 684	17 138	9%	8 052	5 720	-2 332	-29%
Other countries	76 676	85 308	43%	33 483	39 732	6 249	19%

**TABLE 2**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-May21	Jan22-May22	Difference	
<b>TOTAL AGRIFOOD</b>	<b>184 467</b>	<b>198 086</b>	<b>100%</b>	<b>79 043</b>	<b>88 971</b>	<b>9 928</b>	<b>13%</b>
United Kingdom	41 962	41 943	21%	15 907	19 200	3 293	21%
United States	21 447	24 509	12%	9 510	11 578	2 068	22%
China	17 684	17 138	9%	8 052	5 720	- 2 332	-29%
Switzerland	9 030	9 844	5%	4 176	4 738	562	13%
Japan	6 984	7 384	4%	2 864	3 360	497	17%
Russian Federation	6 841	7 356	4%	2 979	2 598	- 382	-13%
Norway	4 844	5 407	3%	2 250	2 406	156	7%
Korea, Republic of	3 029	3 939	2%	1 458	1 957	500	34%
Canada	3 637	4 049	2%	1 527	1 851	324	21%
Morocco	2 165	2 366	1%	1 132	1 642	510	45%
Turkey	3 061	3 561	2%	1 406	1 611	206	15%
Saudi Arabia	4 305	3 633	2%	1 554	1 565	11	1%
Algeria	2 989	2 950	1%	1 320	1 461	141	11%
Australia	3 188	3 300	2%	1 216	1 449	233	19%
Israel	2 141	2 648	1%	1 006	1 316	310	31%
Other countries	51 160	58 060	29%	22 686	26 520	3 833	17%

**TABLE 3**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2020	2021	Share 2021	Jan21-May21	Jan22-May22		
<b>TOTAL AGRIFOOD</b>	<b>184 467</b>	<b>198 086</b>	<b>100%</b>	<b>79 043</b>	<b>88 971</b>	<b>9 928</b>	<b>13%</b>
Cereals	11 414	12 003	6%	4 724	6 282	1 558	33%
Cereal preparations and milling products	18 778	18 811	9%	7 360	8 675	1 315	18%
Dairy products	15 988	17 005	9%	6 717	7 792	1 075	16%
Mixed food preparations and ingredients	11 208	12 265	6%	4 891	5 873	982	20%
Wine and wine based products	13 452	16 631	8%	6 271	6 994	724	12%
Oilseeds and protein crops	1 764	2 149	1%	930	1 024	94	10%
Sheep and goat	617	575	0%	267	317	50	19%
Sugar and isoglucose	556	596	0%	208	257	49	24%
Horticulture	3 868	4 632	2%	2 209	2 158	- 51	-2%
Pigmeat	15 110	14 525	7%	6 812	5 357	-1 455	-21%
Other products	91 711	98 894	50%	38 653	44 242	5 589	14%

**TABLE 4**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2020	2021	Share 2021	Jan21-May21	Jan22-May22		
<b>TOTAL AGRIFOOD</b>	<b>184 467</b>	<b>198 086</b>	<b>100%</b>	<b>79 043</b>	<b>88 971</b>	<b>9 928</b>	<b>13%</b>
Cereal preparations and milling products	18 778	18 811	9%	7 360	8 675	1 315	18%
Dairy products	15 988	17 005	9%	6 717	7 792	1 075	16%
Wine and wine based products	13 452	16 631	8%	6 271	6 994	724	12%
Cereals	11 414	12 003	6%	4 724	6 282	1 558	33%
Mixed food preparations and ingredients	11 208	12 265	6%	4 891	5 873	982	20%
Pigmeat	15 110	14 525	7%	6 812	5 357	- 1 455	-21%
Beer, cider and other beverages	9 713	10 013	5%	3 952	4 381	430	11%
Preparations of fruit, nuts and vegetables	8 060	8 410	4%	3 261	3 941	680	21%
Spirits and liqueurs	6 820	8 410	4%	3 095	3 678	583	19%
Confectionery and chocolate	7 886	8 890	4%	3 131	3 653	522	17%
Vegetables	7 361	7 396	4%	3 137	3 399	262	8%
Pet food and forage crops	6 506	7 346	4%	2 888	3 346	459	16%
Other animal products	6 510	7 531	4%	2 990	3 113	123	4%
Coffee, tea, cocoa and spices	5 932	6 175	3%	2 474	2 819	345	14%
Fruit and nuts	6 026	5 711	3%	2 405	2 518	113	5%
Other products	33 701	36 963	19%	14 935	17 149	2 214	15%



**TABLE 5**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-May21	Jan22-May22	Difference	
<b>TOTAL AGRIFOOD</b>	<b>121 594</b>	<b>130 184</b>	<b>100%</b>	<b>50 789</b>	<b>66 955</b>	<b>16 166</b>	<b>32%</b>
Brazil	11 362	13 536	10%	4 896	7 465	2 569	52%
United Kingdom	15 680	11 861	9%	4 192	5 873	1 681	40%
China	5 128	6 096	5%	2 198	3 711	1 513	69%
Ukraine	5 837	6 917	5%	2 253	3 562	1 310	58%
Australia	1 155	1 900	1%	854	1 911	1 057	124%
Cuba	176	176	0%	85	69	- 16	-19%
Cameroon	697	694	1%	319	297	- 22	-7%
Côte d'Ivoire	3 302	3 341	3%	1 561	1 449	- 111	-7%
Nigeria	477	655	1%	305	189	- 116	-38%
Canada	3 131	2 831	2%	1 201	1 016	- 185	-15%
Other countries	74 650	82 179	63%	32 926	41 413	8 487	26%

**TABLE 6**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-May21	Jan22-May22	Difference	
<b>TOTAL AGRIFOOD</b>	<b>121 594</b>	<b>130 184</b>	<b>100%</b>	<b>50 789</b>	<b>66 955</b>	<b>16 166</b>	<b>32%</b>
Brazil	11 362	13 536	10%	4 896	7 465	2 569	52%
United Kingdom	15 680	11 861	9%	4 192	5 873	1 681	40%
United States	9 587	9 254	7%	4 000	4 720	720	18%
China	5 128	6 096	5%	2 198	3 711	1 513	69%
Ukraine	5 837	6 917	5%	2 253	3 562	1 310	58%
Indonesia	4 334	5 635	4%	1 896	2 568	673	35%
Argentina	4 378	5 176	4%	1 863	2 542	678	36%
Turkey	4 652	5 031	4%	1 972	2 359	387	20%
Switzerland	4 596	4 521	3%	1 767	1 955	188	11%
Australia	1 155	1 900	1%	854	1 911	1 057	124%
Morocco	2 471	2 636	2%	1 482	1 893	411	28%
India	2 364	2 919	2%	1 354	1 544	190	14%
Côte d'Ivoire	3 302	3 341	3%	1 561	1 449	- 111	-7%
Malaysia	2 249	2 678	2%	1 004	1 299	294	29%
Viet Nam	2 168	2 221	2%	806	1 292	486	60%
Other countries	42 332	46 463	36%	18 691	22 812	4 121	22%

**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-May21	Jan22-May22	Difference	
<b>TOTAL AGRIFOOD</b>	<b>121 594</b>	<b>130 184</b>	<b>100%</b>	<b>50 789</b>	<b>66 955</b>	<b>16 166</b>	<b>32%</b>
Oilseeds and protein crops	15 115	18 253	14%	7 423	9 886	2 463	33%
Coffee, tea, cocoa and spices	15 944	17 063	13%	6 817	8 933	2 116	31%
Cereals	5 771	6 175	5%	2 255	3 975	1 719	76%
Vegetable oils (oilseeds and palm)	6 712	8 243	6%	2 655	4 283	1 628	61%
Mixed food preparations and ingredients	5 182	5 588	4%	2 161	2 829	668	31%
Horticulture	1 688	1 923	1%	854	980	127	15%
Wine and wine based products	1 775	1 664	1%	609	669	60	10%
Sugar and isoglucose	843	878	1%	326	380	54	17%
Pigmeat	415	294	0%	111	145	34	31%
Olives and olive oil	751	636	0%	284	318	34	12%
Other products	67 398	69 468	53%	27 295	34 558	7 263	27%

**TABLE 8**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-May21	Jan22-May22	Difference	
<b>TOTAL AGRIFOOD</b>	<b>121 594</b>	<b>130 184</b>	<b>100%</b>	<b>50 789</b>	<b>66 955</b>	<b>16 166</b>	<b>32%</b>
Oilseeds and protein crops	15 115	18 253	14%	7 423	9 886	2 463	33%
Fruit and nuts	21 050	20 704	16%	8 686	9 352	666	8%
Coffee, tea, cocoa and spices	15 944	17 063	13%	6 817	8 933	2 116	31%
Non-edible for technical use	5 841	7 484	6%	2 515	4 308	1 793	71%
Vegetable oils (oilseeds and palm)	6 712	8 243	6%	2 655	4 283	1 628	61%
Cereals	5 771	6 175	5%	2 255	3 975	1 719	76%
Mixed food preparations and ingredients	5 182	5 588	4%	2 161	2 829	668	31%
Preparations of fruit, nuts and vegetables	5 412	5 420	4%	2 159	2 493	334	15%
Vegetables	4 146	4 278	3%	2 048	2 475	426	21%
Other animal products	4 660	4 654	4%	1 744	2 362	618	35%
Margarine and other oils and fats (vegetable)	3 023	3 939	3%	1 542	2 107	565	37%
Cereal preparations and milling products	3 757	3 852	3%	1 496	1 974	478	32%
Spirits and liqueurs	3 060	3 296	3%	1 059	1 569	511	48%
Pet food and forage crops	2 705	2 753	2%	1 051	1 419	368	35%
Tobacco, cigars and cigarettes	2 468	2 299	2%	953	1 229	276	29%
Other products	16 748	16 182	12%	6 225	7 761	1 536	25%

**TABLE 9**
**AGRI-FOOD TRADE BALANCE (MILLION EUR)**

TRADE BALANCE			
PRODUCT/PERIOD	Exports Jan22-May22	Imports Jan22-May22	Trade balance Jan22-May22
	million EUR		
<b>TOTAL AGRIFOOD</b>	<b>88 971</b>	<b>66 955</b>	<b>22 016</b>
Dairy products	7 792	932	6 860
Cereal preparations and milling products	8 675	1 974	6 701
Wine and wine based products	6 994	669	6 326
Pigmeat	5 357	145	5 212
Beer, cider and other beverages	4 381	883	3 498
Mixed food preparations and ingredients	5 873	2 829	3 044
Confectionery and chocolate	3 653	1 042	2 611
Cereals	6 282	3 975	2 307
Spirits and liqueurs	3 678	1 569	2 109
Pet food and forage crops	3 346	1 419	1 928
Olives and olive oil	1 984	318	1 666
Poultry and eggs	2 247	783	1 464
Preparations of fruit, nuts and vegetables	3 941	2 493	1 448
Horticulture	2 158	980	1 178
Tobacco, cigars and cigarettes	2 334	1 229	1 105
Vegetables	3 399	2 475	925
Other animal products	3 113	2 362	751
Beef and veal	1 718	997	721
Unspecified	745	86	659
Sugar and isoglucose	257	380	- 123
Sheep and goat	317	546	- 229
Margarine and other oils and fats (vegetable)	892	2 107	-1 214
Non-edible for technical use	2 021	4 308	-2 287
Vegetable oils (oilseeds and palm)	1 452	4 283	-2 832
Coffee, tea, cocoa and spices	2 819	8 933	-6 114
Fruit and nuts	2 518	9 352	-6 835
Oilseeds and protein crops	1 024	9 886	-8 862



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