



European  
Commission



# MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS IN February 2023  
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## Note to the reader

The latest available consolidated trade data at EU level cover market developments in February 2023. Monthly 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).

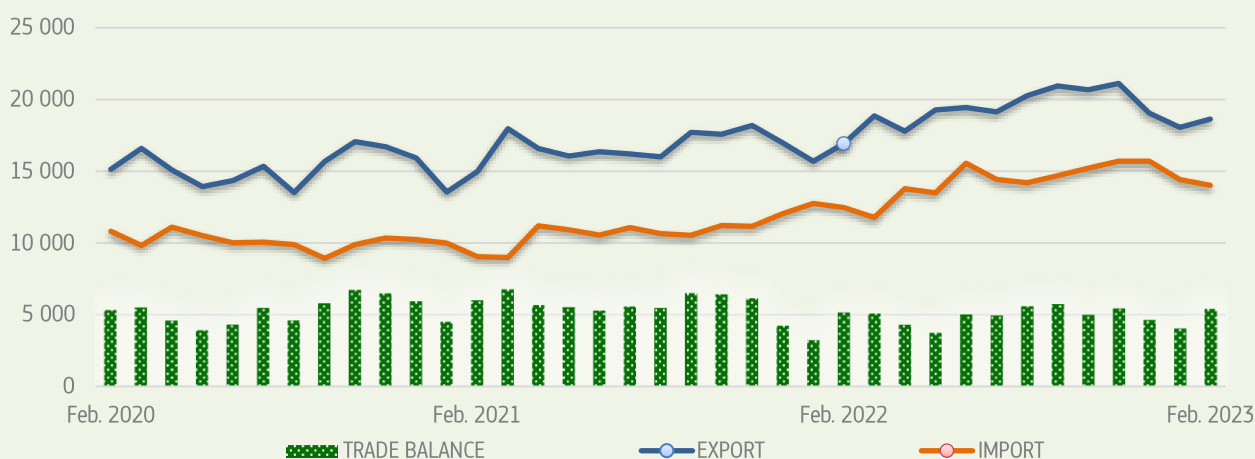
# HIGHLIGHTS: Month-to-month rebound of EU exports in February 2023. Imports still declining.

In February 2023, EU agri-food trade surplus increased by 33% month-to-month to reach EUR 5.4 billion. This was due to a rebound in exports, while imports declined for the third month in a row.

EU exports in February 2023 reached EUR 18.6 billion, a 3% increase compared to January 2023 (and 10% higher than February 2022). Cumulative exports (January and February 2023 combined) reached EUR 36.7 billion, a 13% increase compared to the cumulative exports in 2022. Dynamic exports for cereal preparations, preparation of fruit and nuts and dairy products led the increase for the start of the year.

Conversely, EU imports reached EUR 13.3 billion, a 5% decrease month-to-month (still higher by EUR 1.5 billion compared to February 2022). Cumulative imports for 2023 are still 12% higher compared to 2022, primarily due to higher imports of cereals and oilseeds and protein crops.

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



Source: Comext



# EU AGRI-FOOD EXPORTS

## STRONG EXPORT VALUES AT THE START OF THE YEAR 2023

In February 2023 **EU agri-food exports** increased compared to January and reached a value of **EUR 18.6 billion** (+EUR 1.7 billion compared to February 2022, +10%). While EU exports are still dynamic in the start of the year 2023 compared to last year, the trend of recent months shows that values are coming back to pre-war levels.

EU exports to **the UK** amounted to EUR 3.9 billion, stable compared to January 2023. This is still 9% increase year-to-year. Cumulative (January and February combined) export values of cereal preparations and preparations of fruit, nuts and vegetables to the UK were both 29% higher year-to-year. Wine and wine-based products exports to the UK were down by 4% (driven by a decline in quantities, -11%).

EU exports to **the US** totalled EUR 2.1 billion in February 2023. It is a slight rebound from January, and from the downward trend since July 2023. Regarding the beverages sector, wine, spirits and liqueurs as well as beer, cider and other beverages had a slow start of the year. In quantity terms, they declined by 3%, 29% and 10%, respectively. Still, unit value increased compared to last year, but this compensated the decline in quantity only for wine and wine-based products.

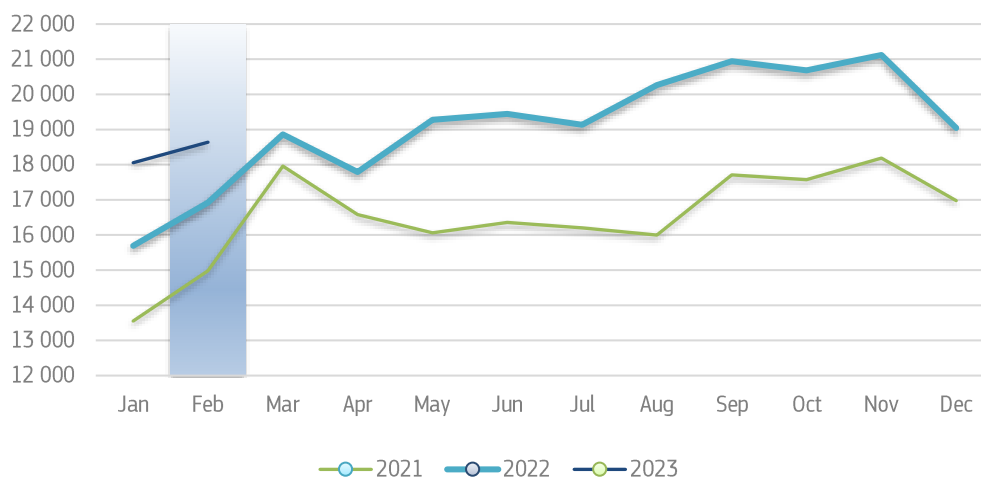
EU exports to **sub-Saharan Africa and North Africa** in February 2023 reached EUR 2.0 billion. It is a 15% increase year-to-year (+EUR 271 million). The EU increased cereal exports in the first two months of 2023 to reach 3.9 million t (+768 thousand t compared to the same period in 2022). Exports of dairy products as well as sheep and goat also increased both in value and quantity terms. Exports of beef and veal, wine and wine-based products as well as fruit and nuts declined both in value and quantity terms.

## EU CEREAL EXPORTS CONTINUE TO BE DYNAMIC IN YEAR 2023

All agri-food categories, except three, have had a dynamic start of the year in value terms (January and February combined) compared to last year. This was mainly driven by a price increase, as quantities exported have mostly declined. A notable exception has been for **cereals** exports, which have increased +11% in quantity terms, and for vegetable oils (+42%).

The three agri-food products that showed a decline in 2023 were: **spirits and liqueurs** (-2% in value terms, -10% in quantities, especially to US and the UK), **horticulture** (-1% in value, -4% in volumes mainly to the UK) and **sugar and isoglucose** (-12% in value, -42% in quantities, chiefly to the UK and to Israel).

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



# EU AGRI-FOOD IMPORTS

## IMPORTS STILL HIGH DESPITE DECLINE FROM SEVERAL PARTNERS

In **February 2023**, EU agri-food imports reached **EUR 13.3 billion** (+EUR 1.5 billion year-to-year, +13%). EU import values have been declining since November last year, mainly due to price reduction. While imports from the UK and Us have remained relatively stable, imports from Ukraine and Brazil continued to decline in February 2023.

EU agri-food imports from **Brazil** reached EUR 1.2 billion in February 2023. This confirms the downward trend of EU imports from Brazil, in value terms. In February, Brazil was the fourth most significant source for EU imports. This has been due to the decline trend in oilseeds and coffee imports.

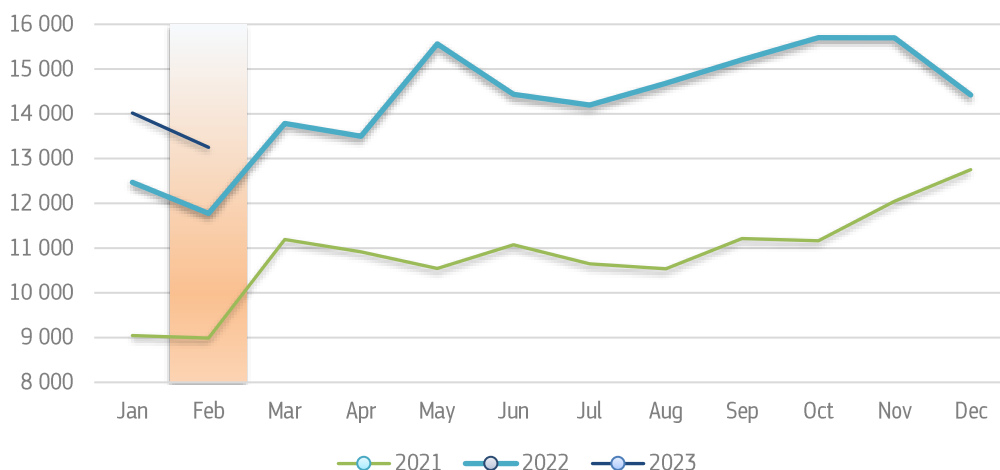
In February 2023, Ukraine remains the top source of EU imports. EU imports from **Ukraine** were still up 45% year-to-year, and reached EUR 1.3 billion. EU imports in value terms have been declining since November 2022, from both a quantity and price effect. Indeed, EU vegetable oil imports from Ukraine are 37% below the level in February 2022 in value (-29% in volumes). Fruit and nuts imports also decreased (-45% in value, -14% in quantity) as well as preparations of fruit and nuts (-13% in value, -39% in volumes).

## EU IMPORTS DECLINED IN FEBRUARY BUT STILL HIGH IN VALUE TERMS

EU imports of all agri-food categories, except three, have had a dynamic start in 2023 (January and February combined). This was the case for EU **cereals** imports (+55% in value, +42% in quantity) as well as **oilseeds and protein crops** (+25% in value, +10% in quantity). EU imports of cereals reached 7.5 million t (compared to 5.3 million t in the same period in 2022) and 7.4 million t of oilseeds and protein crops (6.8 million t in same period of 2022). **Fruit and nuts** imports also increased compared to the same period in 2022 (+4% in value terms) and this was only due to quantity increase.

The three agri-food categories for which imports in 2023 were below 2022 levels were: **vegetable oils** (-15% in value terms), **mixed food preparations** (-6%), and **horticulture** (-3%). This was largely due to a quantity effect, with fewer imports into the EU. This was the case for EU imports of vegetable oils from Ukraine that declined compared to the first two months of 2022 combined. Imports of mixed food preparations declined substantially from the three main EU source namely UK, China and Thailand.

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-Feb22	Jan23-Feb23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>198 141</b>	<b>229 172</b>	<b>100%</b>	<b>32 615</b>	<b>36 695</b>	<b>4 080</b>	<b>13%</b>
United Kingdom	41 946	47 852	21%	6 948	7 865	917	13%
China	17 148	15 794	7%	2 143	2 582	439	20%
Türkiye	3 569	4 159	2%	684	888	204	30%
United States	24 518	28 984	13%	3 992	4 188	196	5%
Saudi Arabia	3 631	4 816	2%	583	766	183	31%
Korea, Republic of	3 940	4 609	2%	718	679	- 39	-5%
Tunisia	558	1 071	0%	175	127	- 48	-27%
Canada	4 049	4 725	2%	665	612	- 53	-8%
Iran, Islamic Republic of	873	1 070	0%	174	113	- 61	-35%
Egypt	2 184	2 843	1%	454	335	- 119	-26%
Other countries	95 725	113 249	49%	16 080	18 539	2 459	15%

**TABLE 2**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Feb22	Jan23-Feb23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>198 141</b>	<b>229 172</b>	<b>100%</b>	<b>32 615</b>	<b>36 695</b>	<b>4 080</b>	<b>13%</b>
United Kingdom	41 946	47 852	21%	6 948	7 865	917	13%
United States	24 518	28 984	13%	3 992	4 188	196	5%
China	17 148	15 794	7%	2 143	2 582	439	20%
Switzerland	9 858	11 186	5%	1 721	1 898	177	10%
Russian Federation	7 341	7 130	3%	1 341	1 356	15	1%
Japan	7 378	8 302	4%	1 298	1 290	- 8	-1%
Norway	5 412	5 952	3%	864	949	85	10%
Türkiye	3 569	4 159	2%	684	888	204	30%
Saudi Arabia	3 631	4 816	2%	583	766	183	31%
Korea, Republic of	3 940	4 609	2%	718	679	- 39	-5%
Morocco	2 368	4 010	2%	533	644	111	21%
Canada	4 049	4 725	2%	665	612	- 53	-8%
Australia	3 302	3 836	2%	560	604	44	8%
Ukraine	3 109	2 926	1%	519	551	32	6%
Algeria	2 948	3 605	2%	442	544	102	23%
Other countries	57 623	71 287	31%	9 606	11 280	1 674	17%

**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-Feb22	Jan23-Feb23		
<b>TOTAL AGRIFOOD</b>	<b>198 141</b>	<b>229 172</b>	<b>100%</b>	<b>32 615</b>	<b>36 695</b>	<b>4 080</b>	<b>13%</b>
Cereal preparations and milling products	18 814	22 924	10%	3 170	3 965	796	25%
Preparations of fruit, nuts and vegetables	8 415	10 496	5%	1 441	1 872	431	30%
Dairy products	16 990	20 369	9%	2 754	3 164	410	15%
Cereals	11 993	16 867	7%	2 196	2 548	351	16%
Confectionery and chocolate	8 885	10 249	4%	1 466	1 745	279	19%
Non-edible for technical use	4 171	4 822	2%	798	803	5	1%
Sheep and goat	578	679	0%	103	105	2	2%
Horticulture	4 643	4 479	2%	824	814	- 10	-1%
Sugar and isoglucose	596	619	0%	110	97	- 13	-12%
Spirits and liqueurs	8 413	9 744	4%	1 306	1 275	- 31	-2%
Other products	114 643	127 924	56%	18 447	20 307	1 860	10%

**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-Feb22	Jan23-Feb23		
<b>TOTAL AGRIFOOD</b>	<b>198 141</b>	<b>229 172</b>	<b>100%</b>	<b>32 615</b>	<b>36 695</b>	<b>4 080</b>	<b>13%</b>
Cereal preparations and milling products	18 814	22 924	10%	3 170	3 965	796	25%
Dairy products	16 990	20 369	9%	2 754	3 164	410	15%
Cereals	11 993	16 867	7%	2 196	2 548	351	16%
Wine and wine based products	16 641	18 255	8%	2 384	2 441	57	2%
Mixed food preparations and ingredients	12 263	14 872	6%	2 156	2 387	231	11%
Pigmeat	14 527	13 796	6%	2 035	2 066	31	2%
Preparations of fruit, nuts and vegetables	8 415	10 496	5%	1 441	1 872	431	30%
Beer, cider and other beverages	10 002	10 918	5%	1 611	1 747	136	8%
Confectionery and chocolate	8 885	10 249	4%	1 466	1 745	279	19%
Vegetables	7 408	8 262	4%	1 329	1 567	238	18%
Pet food and forage crops	7 361	8 573	4%	1 257	1 384	127	10%
Spirits and liqueurs	8 413	9 744	4%	1 306	1 275	- 31	-2%
Coffee, tea, cocoa and spices	6 180	7 353	3%	1 057	1 270	212	20%
Other animal products	7 531	8 197	4%	1 161	1 251	90	8%
Tobacco, cigars and cigarettes	5 504	6 153	3%	926	1 114	187	20%
Other products	37 214	42 143	18%	6 367	6 902	535	8%

**TABLE 5**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Feb22	Jan23-Feb23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>130 122</b>	<b>171 434</b>	<b>100%</b>	<b>24 244</b>	<b>27 268</b>	<b>3 023</b>	<b>12%</b>
Ukraine	6 927	13 203	8%	1 912	2 610	698	37%
Australia	1 901	3 759	2%	515	853	338	66%
United Kingdom	11 874	15 263	9%	2 085	2 397	313	15%
Brazil	13 548	20 173	12%	2 165	2 476	311	14%
United States	9 254	12 251	7%	2 169	2 352	183	8%
Peru	2 711	3 399	2%	516	481	- 35	-7%
Algeria	134	148	0%	69	16	- 53	-77%
China	6 109	9 791	6%	1 424	1 363	- 62	-4%
Moldova, Republic of	517	1 104	1%	191	126	- 66	-34%
Russian Federation	2 175	2 313	1%	483	321	- 162	-33%
Other countries	74 971	90 031	53%	12 716	14 273	1 557	12%

**TABLE 6**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Feb22	Jan23-Feb23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>130 122</b>	<b>171 434</b>	<b>100%</b>	<b>24 244</b>	<b>27 268</b>	<b>3 023</b>	<b>12%</b>
Ukraine	6 927	13 203	8%	1 912	2 610	698	37%
Brazil	13 548	20 173	12%	2 165	2 476	311	14%
United Kingdom	11 874	15 263	9%	2 085	2 397	313	15%
United States	9 254	12 251	7%	2 169	2 352	183	8%
China	6 109	9 791	6%	1 424	1 363	- 62	-4%
Türkiye	5 033	5 623	3%	970	1 121	151	16%
Indonesia	5 649	6 710	4%	891	1 030	140	16%
Argentina	5 171	6 951	4%	793	862	70	9%
Australia	1 901	3 759	2%	515	853	338	66%
Switzerland	4 523	4 846	3%	765	772	7	1%
Morocco	2 639	3 256	2%	652	662	10	1%
Canada	2 834	2 972	2%	439	622	182	41%
Côte d'Ivoire	3 259	3 509	2%	527	606	79	15%
India	2 921	3 662	2%	511	532	21	4%
Viet Nam	2 222	3 451	2%	446	522	76	17%
Other countries	46 257	56 015	33%	7 982	8 487	505	6%



**TABLE 7**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2021	2022	Share 2022	Jan22-Feb22	Jan23-Feb23		
<b>TOTAL AGRIFOOD</b>	<b>130 122</b>	<b>171 434</b>	<b>100%</b>	<b>24 244</b>	<b>27 268</b>	<b>3 023</b>	<b>12%</b>
Cereals	6 188	12 744	7%	1 652	2 555	904	55%
Oilseeds and protein crops	18 250	25 708	15%	3 377	4 205	828	25%
Tobacco, cigars and cigarettes	2 306	3 702	2%	445	707	261	59%
Sugar and isoglucose	878	1 399	1%	152	297	145	95%
Vegetables	4 283	5 069	3%	926	1 048	123	13%
Pigmeat	293	374	0%	49	58	8	17%
Wine and wine based products	1 664	1 843	1%	254	257	3	1%
Horticulture	1 928	2 096	1%	402	390	- 12	-3%
Mixed food preparations and ingredients	5 590	6 705	4%	1 049	986	- 63	-6%
Vegetable oils (oilseeds and palm)	8 239	11 027	6%	1 610	1 366	- 243	-15%
Other products	80 503	100 767	59%	14 329	15 398	1 070	7%

**TABLE 8**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2021	2022	Share 2022	Jan22-Feb22	Jan23-Feb23		
<b>TOTAL AGRIFOOD</b>	<b>130 122</b>	<b>171 434</b>	<b>100%</b>	<b>24 244</b>	<b>27 268</b>	<b>3 023</b>	<b>12%</b>
Oilseeds and protein crops	18 250	25 708	15%	3 377	4 205	828	25%
Fruit and nuts	20 720	22 203	13%	3 295	3 415	120	4%
Coffee, tea, cocoa and spices	16 946	21 958	13%	3 296	3 388	92	3%
Cereals	6 188	12 744	7%	1 652	2 555	904	55%
Non-edible for technical use	7 489	11 520	7%	1 438	1 510	72	5%
Vegetable oils (oilseeds and palm)	8 239	11 027	6%	1 610	1 366	- 243	-15%
Vegetables	4 283	5 069	3%	926	1 048	123	13%
Preparations of fruit, nuts and vegetables	5 419	6 526	4%	954	1 035	81	9%
Other animal products	4 668	6 084	4%	888	990	103	12%
Mixed food preparations and ingredients	5 590	6 705	4%	1 049	986	- 63	-6%
Cereal preparations and milling products	3 856	4 861	3%	764	822	58	8%
Margarine and other oils and fats (vegetable)	3 931	5 109	3%	698	757	59	8%
Tobacco, cigars and cigarettes	2 306	3 702	2%	445	707	261	59%
Spirits and liqueurs	3 301	4 415	3%	558	680	122	22%
Pet food and forage crops	2 761	3 517	2%	531	554	23	4%
Other products	16 175	20 287	12%	2 765	3 249	484	18%

**TABLE 9**

AGRI-FOOD TRADE BALANCE (MILLION EUR)

TRADE BALANCE			
PRODUCT/PERIOD	Exports Jan23- Feb23	Imports Jan23- Feb23	Trade balance Jan23-Feb23
	million EUR		
<b>TOTAL AGRIFOOD</b>	<b>36 695</b>	<b>27 268</b>	<b>9 427</b>
Cereal preparations and milling products	3 965	822	3 144
Dairy products	3 164	405	2 759
Wine and wine based products	2 441	257	2 185
Pigmeat	2 066	58	2 008
Beer, cider and other beverages	1 747	329	1 418
Mixed food preparations and ingredients	2 387	986	1 400
Confectionery and chocolate	1 745	492	1 253
Preparations of fruit, nuts and vegetables	1 872	1 035	837
Pet food and forage crops	1 384	554	830
Olives and olive oil	758	119	639
Spirits and liqueurs	1 275	680	594
Poultry and eggs	925	367	559
Vegetables	1 567	1 048	518
Horticulture	814	390	424
Tobacco, cigars and cigarettes	1 114	707	407
Beef and veal	667	359	308
Other animal products	1 251	990	261
Unspecified	146	0	145
Cereals	2 548	2 555	- 7
Sheep and goat	105	177	- 72
Sugar and isoglucose	97	297	- 199
Margarine and other oils and fats (vegetable)	372	757	- 385
Vegetable oils (oilseeds and palm)	730	1 366	- 636
Non-edible for technical use	803	1 510	- 707
Coffee, tea, cocoa and spices	1 270	3 388	-2 118
Fruit and nuts	999	3 415	-2 417
Oilseeds and protein crops	485	4 205	-3 720
<i>Fish and fish products</i>	1 246	4 926	-3 680
<b>TOTAL AGRIFOOD AND FISH</b>	<b>37 941</b>	<b>32 194</b>	<b>5 747</b>



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