



European  
Commission

# MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS in September 2023  
Publication: December 2023

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## Note to the reader

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

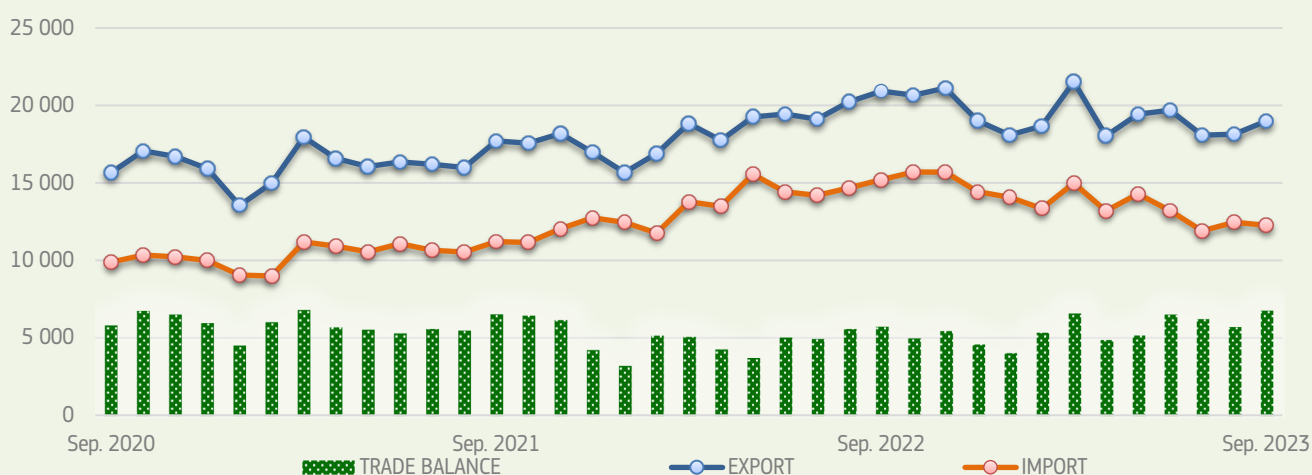
# HIGHLIGHTS: EU agri-food trade surplus increases in September 2023

EU agri-food trade surplus reached +EUR 6.7 billion in September 2023, this is an 18% increase compared to the previous month as well as compared to September 2022. The cumulative trade balance (January to September 2023) reached EUR 51 billion. It is EUR 8.5 billion higher compared to the same period in 2022.

EU exports increased by 5% month-on-month at EUR 19 billion in September 2023. This remains 9% lower than in September 2022. Cumulative exports since January reached EUR 170.7 billion, 2% higher compared than in the same period in 2022. Main increases were for cereal preparations and preparations of fruit and nuts.

EU imports decreased by 2% month-on-month in September. They reached EUR 12.3 billion, 19% below their level of September 2022. Cumulative imports (from January to September 2023) reached EUR 119.7 billion, 5% below their 2022 level, with 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 INCREASE IN SEPTEMBER 2023

**EU agri-food exports increased to EUR 19 billion** in September 2023, a 5% increase month-on-month. However, they remain 9% below their September 2022 level. Cumulative exports from January to September 2023 reached EUR 170.7 billion, EUR 2.6 billion (+2%) higher than for the same period last year.

Cumulative EU agri-food exports to the **UK** increased significantly compared to 2022, with a growth of EUR 3 billion (+8%). This is explained particularly by an export increase of cereal preparations and milling products, preparations of fruit and nuts, confectionery and chocolate and pigmeat.

**Türkiye** is the other destination for which EU cumulative exports increased significantly in 2023 compared to 2022 (+EUR 836 million, +29%). However, these exports appear to be back at their 2022 level in August and September.

On the other hand, the largest reduction in EU exports was recorded for the **US**, with a decrease of EUR 1.9 billion (-8%). This is largely explained by a reduction in exports of spirits and liqueurs and wine and wine-based products.

Another significant reduction in EU exports has been recorded for exports to **Egypt** (-EUR 739 million, -36%), mainly driven by a reduction of cereal exports.

## PIGMEAT AND SPIRITS EXPORTS DECREASED IN 2023

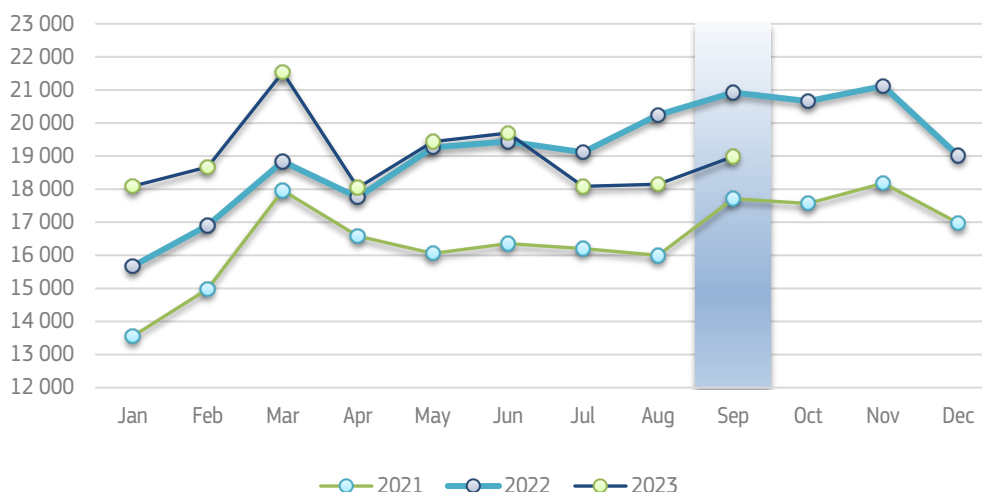
Cumulative exports for **cereal preparations and milling products** saw the largest increase compared to 2022 (+EUR 1.4 billion, +8%), followed by those of **preparations of fruit and vegetables** (+EUR 1.3 billion, +17%) and **confectionary and chocolate** (+EUR 1 billion, +14%). However, these increases in value are solely explained by higher prices and the volumes exported of these products declined by 5 to 8%.

Conversely, **cereals** represented the largest reduction in export value compared to 2022 (-EUR 1.9 billion, -15%). However, this is explained by reduced export prices (-18% in unit value). EU export volumes actually increased by 3.5%, reaching 36 million tonnes from January to September.

Export values also decreased for **pigmeat** (-EUR 986 million, -10%), **spirits and liqueurs** (-EUR 555 million, -7%), and **wine and wine-based products** (-EUR 407 million, -3%). These reductions in exports are more significant in volume terms, with respectively -19%, -11% and -7%.

On the other hand, volumes exported increased by 28% for **vegetable oils** and 13% for **oilseeds and protein crops**. However, lower export prices lead to a decrease of export values for **vegetable oils** (-EUR 120 million, -4%) and a small increase for oilseed and protein crops (+EUR 38 million, +2%).

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



# EU AGRI-FOOD IMPORTS

## EU IMPORTS REMAIN BELOW 2022 LEVEL IN SEPTEMBER

The value of EU **agri-food imports** was **EUR 12.3 billion** in September, a 2% reduction compared to the previous month and 19% below their level in September 2022. Cumulative imports from January to September 2023 reached EUR 119.7 billion, a 5% reduction compared to the same period in 2022 (-EUR 5.9 billion).

Imports from **Ukraine** saw the largest increase from January to September compared to 2022 (+EUR 891 million, +11%), mostly due to higher cereal imports. However, EU imports from Ukraine are below their 2022 level since June and were nearly back at their 2021 level in September.

Imports from **Türkiye** grew by 18% compared to 2022 (+EUR 715 million), mostly due to increased imports of fruit and nuts, vegetables, cereals as well as olives and olive oil.

On the other hand, the three largest reductions in EU imports compared to 2022 were from **Brazil** (-EUR 1.9 billion, -13%, mostly in soya beans, coffee and maize), **Argentina** (-EUR 1.4, -27%, mostly soya meals) and **Australia** (-EUR 889 million, -29%, mostly rapeseed).

Imports also decreased from **China** by EUR 854 million (-12%), as well as from **Indonesia** (-EUR 555 million, -11%), mostly due to reduced imports in non-edible products in both cases.

## LOWER IMPORTS OF OILSEEDS AND VEGETABLE OILS IN 2023

Import values reduced mostly for **oilseeds and protein crops** (-EUR 2.7 billion, -14%) and **vegetable oils** (-EUR 2.3 billion, -28%), due to reductions of both prices and volumes.

Other significant reductions in import values were observed for **non-edible products** (-EUR 1.4 billion, -16% mostly due to lower prices), **coffee, tea, cocoa and spices** (-EUR 997 million, -6%) and **margarine and other oils and fats** (-EUR 966 million, -24%, explained by lower prices while volumes increased by 7%).

On the other hand, **tobacco and tobacco products** cumulative imports (January to September) increased the most compared to 2022 (+EUR 951 million, +38%).

It was followed by a growth of **cereals** imports of EUR 818 million (+10%), despite lower import prices. In volumes, cumulative cereals imports reached 28 million tonnes from January to September, a 19% increase compared to 2022.

**Sugar** imports were also at a high level, with an increase of 91% in cumulative value (EUR 735 million) and 56% in volume compared to 2022. However, their monthly value is back below their 2022 level since August.

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

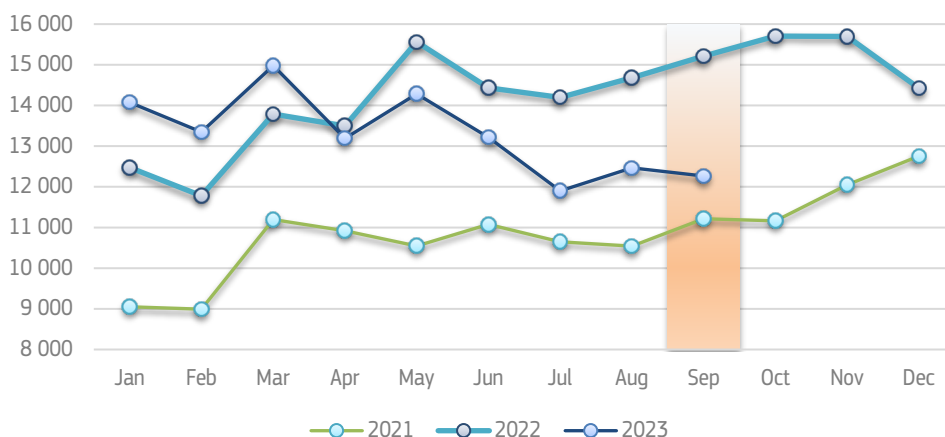


TABLE 1

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

TRADING PARTNERS	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Sep22	Jan23-Sep23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>198 124</b>	<b>228 892</b>	<b>100%</b>	<b>168 096</b>	<b>170 693</b>	<b>2 597</b>	<b>2%</b>
United Kingdom	41 949	47 800	21%	35 271	38 223	2 952	8%
Türkiye	3 569	4 157	2%	2 871	3 707	836	29%
Ukraine	3 109	2 923	1%	2 106	2 505	399	19%
Switzerland	9 858	11 175	5%	8 247	8 611	364	4%
Thailand	1 223	1 234	1%	890	1 152	262	29%
Tunisia	558	1 071	0%	892	523	- 369	-41%
Iran, Islamic Republic of	873	1 070	0%	942	380	- 562	-60%
Algeria	2 948	3 576	2%	2 779	2 209	- 570	-20%
Egypt	2 183	2 842	1%	2 070	1 331	- 739	-36%
United States	24 516	28 975	13%	21 914	20 085	-1 829	-8%
Other countries	107 339	124 069	54%	90 113	91 966	1 853	2%

TABLE 2

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

TRADING PARTNERS	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Sep22	Jan23-Sep23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>198 124</b>	<b>228 892</b>	<b>100%</b>	<b>168 096</b>	<b>170 693</b>	<b>2 597</b>	<b>2%</b>
United Kingdom	41 949	47 800	21%	35 271	38 223	2 952	8%
United States	24 516	28 975	13%	21 914	20 085	- 1 829	-8%
China	17 147	15 802	7%	11 093	11 170	77	1%
Switzerland	9 858	11 175	5%	8 247	8 611	364	4%
Japan	7 377	8 281	4%	6 106	6 050	- 56	-1%
Russian Federation	7 340	7 121	3%	4 869	5 087	218	4%
Norway	5 412	5 961	3%	4 435	4 469	34	1%
Türkiye	3 569	4 157	2%	2 871	3 707	836	29%
Saudi Arabia	3 631	4 805	2%	3 409	3 411	2	0%
Korea, Republic of	3 939	4 602	2%	3 470	3 393	- 77	-2%
Canada	4 049	4 722	2%	3 583	3 263	- 320	-9%
Morocco	2 368	4 003	2%	2 991	2 932	- 59	-2%
Australia	3 302	3 836	2%	2 883	2 848	- 35	-1%
Ukraine	3 109	2 923	1%	2 106	2 505	399	19%
United Arab Emirates	2 346	3 256	1%	2 349	2 467	118	5%
Other countries	58 213	71 473	31%	52 498	52 471	- 27	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-Sep22	Jan23-Sep23		
<b>TOTAL AGRIFOOD</b>	<b>198 124</b>	<b>228 892</b>	<b>100%</b>	<b>168 096</b>	<b>170 693</b>	<b>2 597</b>	<b>2%</b>
Cereal preparations and milling products	18 810	22 919	10%	16 595	17 990	1 395	8%
Preparations of fruit, nuts and vegetables	8 415	10 493	5%	7 470	8 745	1 276	17%
Confectionery and chocolate	8 884	10 251	4%	7 298	8 304	1 006	14%
Tobacco, cigars and cigarettes	5 504	6 156	3%	4 442	5 288	846	19%
Coffee, tea, cocoa and spices	6 180	7 353	3%	5 361	6 029	667	12%
Dairy products	16 990	20 363	9%	15 151	14 906	- 245	-2%
Wine and wine based products	16 641	18 268	8%	13 460	13 053	- 407	-3%
Spirits and liqueurs	8 413	9 751	4%	7 435	6 881	- 555	-7%
Pigmeat	14 527	13 832	6%	10 101	9 116	- 986	-10%
Cereals	11 986	16 861	7%	12 959	11 022	-1 937	-15%
Other products	81 775	92 644	40%	67 822	69 359	1 536	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-Sep22	Jan23-Sep23		
<b>TOTAL AGRIFOOD</b>	<b>198 124</b>	<b>228 892</b>	<b>100%</b>	<b>168 096</b>	<b>170 693</b>	<b>2 597</b>	<b>2%</b>
Cereal preparations and milling products	18 810	22 919	10%	16 595	17 990	1 395	8%
Dairy products	16 990	20 363	9%	15 151	14 906	- 245	-2%
Wine and wine based products	16 641	18 268	8%	13 460	13 053	- 407	-3%
Mixed food preparations and ingredients	12 262	14 874	6%	10 936	11 326	390	4%
Cereals	11 986	16 861	7%	12 959	11 022	- 1 937	-15%
Pigmeat	14 527	13 832	6%	10 101	9 116	- 986	-10%
Preparations of fruit, nuts and vegetables	8 415	10 493	5%	7 470	8 745	1 276	17%
Beer, cider and other beverages	10 002	10 891	5%	8 185	8 443	258	3%
Confectionery and chocolate	8 884	10 251	4%	7 298	8 304	1 006	14%
Spirits and liqueurs	8 413	9 751	4%	7 435	6 881	- 555	-7%
Other animal products	7 527	8 149	4%	5 997	6 344	347	6%
Pet food and forage crops	7 361	8 620	4%	6 420	6 203	- 217	-3%
Vegetables	7 408	8 257	4%	5 706	6 203	496	9%
Coffee, tea, cocoa and spices	6 180	7 353	3%	5 361	6 029	667	12%
Tobacco, cigars and cigarettes	5 504	6 156	3%	4 442	5 288	846	19%
Other products	37 215	41 853	18%	30 577	30 839	262	1%

**TABLE 5**

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

TRADING PARTNERS	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Sep22	Jan23-Sep23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>130 149</b>	<b>171 486</b>	<b>100%</b>	<b>125 634</b>	<b>119 728</b>	<b>- 5 905</b>	<b>-5%</b>
Ukraine	6 927	13 210	8%	7 859	8 750	891	11%
Türkiye	5 033	5 622	3%	4 005	4 720	715	18%
Egypt	1 181	1 371	1%	1 086	1 576	490	45%
United Kingdom	11 900	15 272	9%	11 060	11 464	405	4%
Côte d'Ivoire	3 259	3 510	2%	2 663	3 010	347	13%
Indonesia	5 649	6 737	4%	4 897	4 342	- 555	-11%
China	6 110	9 784	6%	7 169	6 315	- 854	-12%
Australia	1 901	3 774	2%	3 060	2 171	- 889	-29%
Argentina	5 171	6 943	4%	4 933	3 577	-1 355	-27%
Brazil	13 548	20 173	12%	15 176	13 258	-1 919	-13%
Other countries	69 471	85 089	50%	63 725	60 544	-3 181	-5%

**TABLE 6**

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

TRADING PARTNERS	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Sep22	Jan23-Sep23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>130 149</b>	<b>171 486</b>	<b>100%</b>	<b>125 634</b>	<b>119 728</b>	<b>- 5 905</b>	<b>-5%</b>
Brazil	13 548	20 173	12%	15 176	13 258	- 1 919	-13%
United Kingdom	11 900	15 272	9%	11 060	11 464	405	4%
Ukraine	6 927	13 210	8%	7 859	8 750	891	11%
United States	9 254	12 251	7%	8 944	8 597	- 347	-4%
China	6 110	9 784	6%	7 169	6 315	- 854	-12%
Türkiye	5 033	5 622	3%	4 005	4 720	715	18%
Indonesia	5 649	6 737	4%	4 897	4 342	- 555	-11%
Argentina	5 171	6 943	4%	4 933	3 577	-1 355	-27%
Switzerland	4 523	4 848	3%	3 541	3 532	- 9	0%
Côte d'Ivoire	3 259	3 510	2%	2 663	3 010	347	13%
India	2 921	3 660	2%	2 844	2 576	- 268	-9%
Viet Nam	2 222	3 445	2%	2 592	2 513	- 78	-3%
Morocco	2 639	3 261	2%	2 514	2 370	- 144	-6%
South Africa	2 293	2 621	2%	2 077	2 296	219	11%
Peru	2 711	3 402	2%	2 366	2 233	- 133	-6%
Other countries	45 989	56 746	33%	42 994	40 175	- 2 819	-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-Sep22	Jan23-Sep23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>130 149</b>	<b>171 486</b>	<b>100%</b>	<b>125 634</b>	<b>119 728</b>	<b>- 5 905</b>	<b>-5%</b>
Tobacco, cigars and cigarettes	2 306	3 713	2%	2 474	3 425	951	38%
Cereals	6 189	12 753	7%	8 228	9 046	818	10%
Sugar and isoglucose	878	1 400	1%	803	1 538	735	91%
Vegetables	4 283	5 069	3%	3 746	4 363	617	16%
Spirits and liqueurs	3 301	4 417	3%	3 127	3 428	301	10%
Margarine and other oils and fats (vegetable)	3 931	5 115	3%	3 980	3 013	- 966	-24%
Coffee, tea, cocoa and spices	16 946	21 970	13%	16 474	15 477	- 997	-6%
Non-edible for technical use	7 489	11 523	7%	8 542	7 154	-1 388	-16%
Vegetable oils (oilseeds and palm)	8 239	11 048	6%	8 270	5 929	-2 340	-28%
Oilseeds and protein crops	18 251	25 710	15%	18 935	16 242	-2 693	-14%
Other products	58 335	68 767	40%	51 055	50 113	- 942	-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-Sep22	Jan23-Sep23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>130 149</b>	<b>171 486</b>	<b>100%</b>	<b>125 634</b>	<b>119 728</b>	<b>- 5 905</b>	<b>-5%</b>
Fruit and nuts	20 721	22 233	13%	16 827	16 662	- 166	-1%
Oilseeds and protein crops	18 251	25 710	15%	18 935	16 242	- 2 693	-14%
Coffee, tea, cocoa and spices	16 946	21 970	13%	16 474	15 477	- 997	-6%
Cereals	6 189	12 753	7%	8 228	9 046	818	10%
Non-edible for technical use	7 489	11 523	7%	8 542	7 154	- 1 388	-16%
Vegetable oils (oilseeds and palm)	8 239	11 048	6%	8 270	5 929	- 2 340	-28%
Preparations of fruit, nuts and vegetables	5 420	6 526	4%	4 744	4 796	53	1%
Mixed food preparations and ingredients	5 594	6 702	4%	5 109	4 548	- 561	-11%
Vegetables	4 283	5 069	3%	3 746	4 363	617	16%
Other animal products	4 669	6 098	4%	4 375	4 128	- 248	-6%
Cereal preparations and milling products	3 858	4 839	3%	3 533	3 582	49	1%
Spirits and liqueurs	3 301	4 417	3%	3 127	3 428	301	10%
Tobacco, cigars and cigarettes	2 306	3 713	2%	2 474	3 425	951	38%
Margarine and other oils and fats (vegetable)	3 931	5 115	3%	3 980	3 013	- 966	-24%
Pet food and forage crops	2 765	3 512	2%	2 618	2 360	- 258	-10%
Other products	16 185	20 255	12%	14 651	15 575	924	6%

TABLE 9

EU AGRIFOOD TRADE BALANCE (million EUR)

TRADE BALANCE			
AGRI-FOOD CATEGORIES/PERIOD	Exports Jan23- Sep23	Imports Jan23- Sep23	Trade balance Jan23-Sep23
	million EUR		
<b>TOTAL AGRIFOOD</b>	<b>170,693</b>	<b>119,728</b>	<b>50 964</b>
Cereal preparations and milling products	17 990	3 582	14 408
Dairy products	14 906	1 627	13 279
Wine and wine based products	13 053	1 119	11 934
Pigmeat	9 116	300	8 816
Mixed food preparations and ingredients	11 326	4 548	6 778
Beer, cider and other beverages	8 443	1 842	6 600
Confectionery and chocolate	8 304	2 210	6 094
Preparations of fruit, nuts and vegetables	8 745	4 796	3 949
Pet food and forage crops	6 203	2 360	3 843
Spirits and liqueurs	6 881	3 428	3 453
Olives and olive oil	3 621	835	2 786
Poultry and eggs	4 452	1 777	2 675
Other animal products	6 344	4 128	2 217
Cereals	11 022	9 046	1 976
Tobacco, cigars and cigarettes	5 288	3 425	1 863
Horticulture	3 399	1 554	1 845
Vegetables	6 203	4 363	1 840
Beef and veal	3 432	1 803	1 629
Unspecified	1 085	0	1 085
Sheep and goat	522	968	- 446
Sugar and isoglucose	467	1 538	-1 071
Margarine and other oils and fats (vegetable)	1 619	3 013	-1 394
Vegetable oils (oilseeds and palm)	2 836	5 929	-3 093
Non-edible for technical use	3 289	7 154	-3 865
Coffee, tea, cocoa and spices	6 029	15 477	-9 448
Fruit and nuts	4 237	16 662	-12 425
Oilseeds and protein crops	1 880	16 242	-14 362
<i>For info: fish and fish products</i>	<i>5 493</i>	<i>22 464</i>	<i>-16 971</i>
<i>Total agrifood and fish</i>	<i>176 186</i>	<i>142 192</i>	<i>33 993</i>



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