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# MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS in April 2023  
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## Note to the reader

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



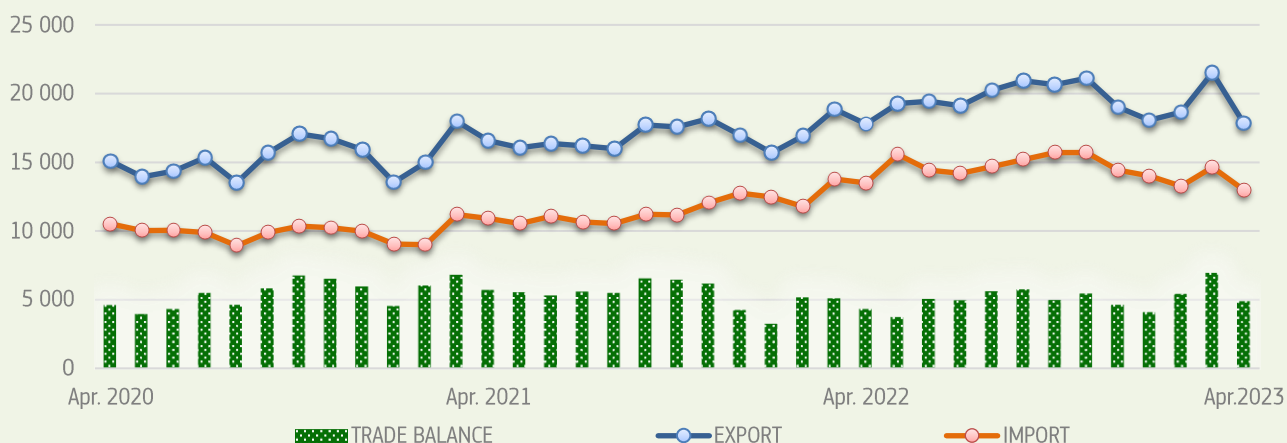
# HIGHLIGHTS: EU agri-food trade slows down in April 2023 compared to April 2022.

After a dynamic month of March, EU agri-food trade slowed down in April 2023, with a decrease of both imports and exports. EU agri-food surplus reached +EUR 4.8 billion in April, a 30% reduction month-on-month. This slide was due to a larger decrease in exports than in imports.

EU exports decreased to EUR 17.8 billion in April 2023, a 17% decrease compared to March 2023 and back at the same level than in April 2022, due to the decrease of export volumes across all products categories, while export unit values remained high. Cumulative exports (January to April 2023) reached EUR 76.1 billion (+10% compared to the same period in 2022), in particular for cereal preparations and preparations of fruit and nuts.

EU imports decreased as well in April 2023 by 11% month-on-month and reached EUR 13 billion, 4% below their level in April 2022. Contrary to exports, this decrease of the value of EU imports is mostly the result of a downward trend in imports prices in the last few months, while volumes only fell in April. Cumulative imports over the beginning of 2023 remained 7% higher compared to the same period in 2022.

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



Source: Comext



# EU AGRI-FOOD EXPORTS

## AFTER A RECORD MONTH OF MARCH, EU EXPORTS DECREASED IN APRIL

**EU agri-food exports** decreased significantly in April and reached EUR 17.8 billion, the same value of April 2022 (-EUR 3.7 billion, -17% compared to March 2023). A reduction of exports was observed across all agri-food products month-on-month. However, cumulative exports between January and April remained 10% higher in 2023 (+EUR 6.8 billion) compared to the same period in 2022.

This increase in exports over the beginning of the year is explained by increased exports to the **UK** (+EUR 1.7 billion, +11%, mainly cereal preparations and preparations of fruits, nuts and vegetables), as well as increased exports to **China** (+EUR 734 million, +16%, mostly cereals, cereals preparations and pigmeat) and **Türkiye** (+EUR 548, +41%, mostly cereals, cereals preparations and pigmeat).

Cumulative exports over the beginning of the year have also been higher in direction of **Ukraine** (+44%, +EUR 349 million) and the **Russian federation** (+17%, +EUR 376 million), compared to the same period in 2022. However, this is mainly explained by the fall of exports towards these countries in 2022, following the beginning of the war. Export values to Ukraine and Russia in 2023 remain comparable to their 2021 level. They are also explained by increased prices, as volumes exported to Russia have decreased for most products.

Exports towards **Egypt** decreased between January and April in comparison to the same period last year (-EUR 233 million, -26%), as well as in direction of **Iran** (-EUR 182, -50%) and **Tunisia** (-EUR 159, -36%), mostly due to a reduction in cereal exports.

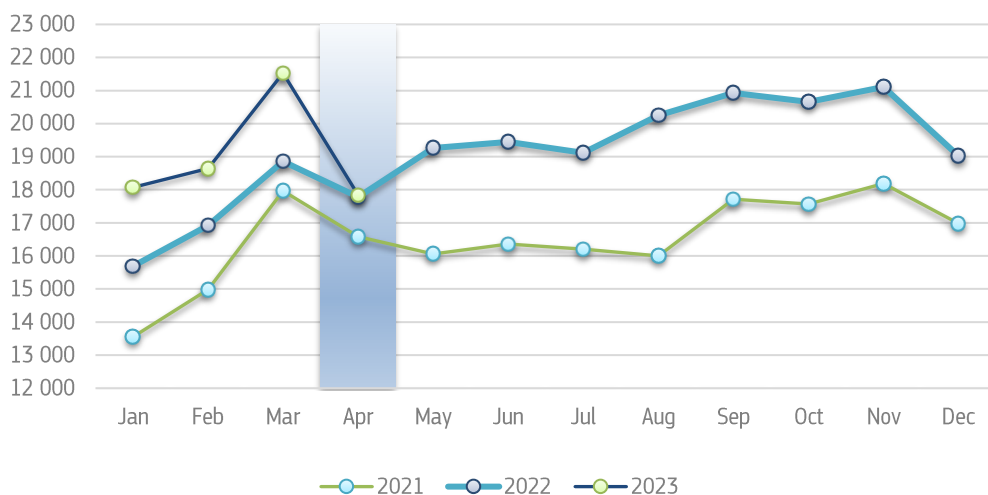
## EU EXPORTS VALUE REMAIN HIGH DUE TO HIGHER PRICES

The cumulative value of EU exports was higher for most products between January and April 2023 compared to the same period in 2022. However, this increase is mostly explained by **higher exports prices**, while quantities exported have decreased for many products (-3% on average across product categories).

Among the few products which saw their export volumes increase over that period, the most notable increases were for **vegetable oils** (+38%), **oilseeds and protein crops** (+17%), **margarine and other oils and fats** (+16%) and **cereals** (+7%).

On the other hand, EU exports in volumes were significantly lower between January and April 2023 compared to the same period in 2022 for **sugar and isoglucose** (-40%), **olives and olive oil** (-17%), **petfood and forage crops** (-14%), **pigmeat** (-14%) and **vegetables** (-13%).

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



# EU AGRI-FOOD IMPORTS

## EU AGRI-FOOD IMPORTS DECREASED IN APRIL 2023

EU **agri-food imports decreased** in April, at EUR 13 billion, an 11% reduction month-on-month (-EUR 1.6 billion). It was also 4% below imports of April 2022. This reduction in imports was observed across most products, at the exception of beef and veal (+12% month-on-month), margarine and other oils and fats (+15%) and pigmeat (+4%).

Over the beginning of the year, cumulative EU agri-food imports remained 7% higher than on the same period in 2022 (+EU 3.4 billion). **Brazil** was the top source of agri-food imports for the EU on that period, with EUR 5.4 billion (mostly soya and coffee), at a similar level than in 2022.

Increased imports from **Ukraine** (+EUR 1.9 billion, +66%, mostly cereals, oilseeds and sugar) explain the majority of the increased value of EU total imports from January to April, compared to last year. Imports also increased from **UK** (+EUR 397 million, +9%, mainly cereals), the **US** (+EUR 351 million, +9%, mostly oilseeds and protein crops), **Canada** (mostly wheat) and **Côte d'Ivoire** (+EUR 261 million, +23%).

On the other hand, reduced imports were observed from **Russia** (-EUR 413 million, -40%), mainly due to reductions in imports of vegetable oils and cereal preparations.

Imports also decreased from **Argentina** (-EUR 258 million, -14%, mostly in protein crops), **China** (-EUR 212 million, -7%, mainly in non-edibles), the **Philippines** (-EUR 209 million, -39%; mainly in margarine and other oils and fats) and **Moldova** (-EUR 192 million, -43%).

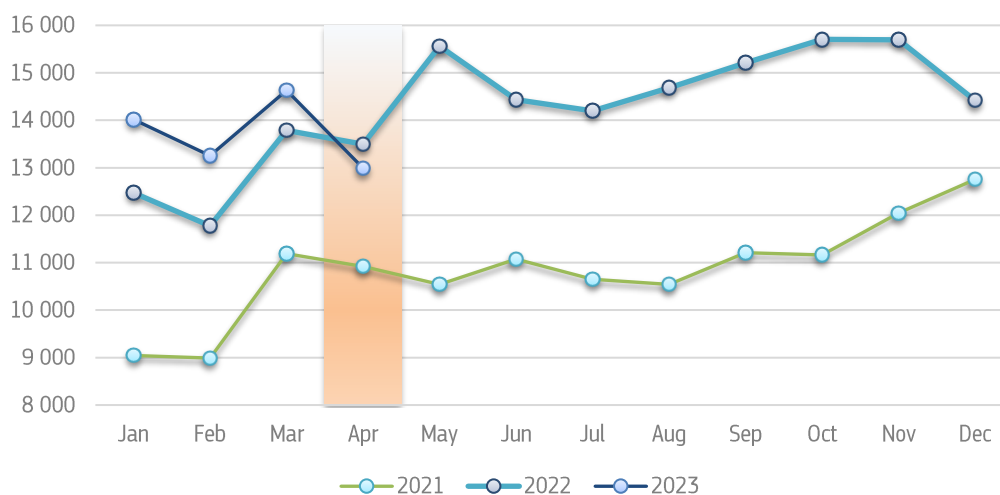
## HIGH IMPORTS OF SUGAR IN THE BEGINNING OF 2023

Increased imports of **cereals**, both in value (+EUR 1.8 billion, +60%) and in volume (+59%), explain a large share of the increase of EU imports over the beginning of the year compared to 2022.

A large increase of imports of **tobacco products** can be observed (+EUR 546 million, +57%). However, this is partly explained by increased imports prices (+36% in unit value year-on-year).

Imports of **sugar and isoglucose** more than doubled in value year-on-year between January and April (+EUR 421 million, +140%) and increased significantly in volume as well (+83%). Combined with the reduction in exports, this resulted in a degradation of the **trade balance** for sugar and isoglucose from -EUR 95 million in 2022 to -EUR 529 million in 2023 (January to April).

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-Apr22	Jan23-Apr23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>198 141</b>	<b>229 031</b>	<b>100%</b>	<b>69 239</b>	<b>76 084</b>	<b>6 844</b>	<b>10%</b>
United Kingdom	41 946	47 842	21%	14 939	16 645	1 706	11%
China	17 148	15 794	7%	4 451	5 185	734	16%
Türkiye	3 569	4 159	2%	1 323	1 871	548	41%
Russian Federation	7 341	7 129	3%	2 203	2 579	376	17%
Ukraine	3 109	2 926	1%	795	1 144	349	44%
United States	24 518	28 983	13%	8 872	8 735	- 137	-2%
Canada	4 049	4 725	2%	1 445	1 298	- 147	-10%
Tunisia	558	1 071	0%	440	282	- 159	-36%
Iran, Islamic Republic of	873	1 070	0%	365	183	- 182	-50%
Egypt	2 184	2 843	1%	915	681	- 233	-26%
Other countries	92 845	112 489	49%	33 490	37 481	3 991	12%

**TABLE 2**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Apr22	Jan23-Apr23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>198 141</b>	<b>229 031</b>	<b>100%</b>	<b>69 239</b>	<b>76 084</b>	<b>6 844</b>	<b>10%</b>
United Kingdom	41 946	47 842	21%	14 939	16 645	1 706	11%
United States	24 518	28 983	13%	8 872	8 735	- 137	-2%
China	17 148	15 794	7%	4 451	5 185	734	16%
Switzerland	9 858	11 186	5%	3 744	3 986	241	6%
Japan	7 378	8 296	4%	2 631	2 684	53	2%
Russian Federation	7 341	7 129	3%	2 203	2 579	376	17%
Norway	5 412	5 889	3%	1 865	1 946	81	4%
Türkiye	3 569	4 159	2%	1 323	1 871	548	41%
Saudi Arabia	3 631	4 816	2%	1 228	1 574	346	28%
Korea, Republic of	3 940	4 608	2%	1 503	1 516	13	1%
Morocco	2 368	4 009	2%	1 350	1 342	- 8	-1%
Canada	4 049	4 725	2%	1 445	1 298	- 147	-10%
Australia	3 302	3 836	2%	1 139	1 214	74	7%
Algeria	2 948	3 605	2%	1 064	1 156	91	9%
Ukraine	3 109	2 926	1%	795	1 144	349	44%
Other countries	57 623	71 227	31%	20 685	23 210	2 525	12%

**TABLE 3**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Apr22	Jan23-Apr23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>198 141</b>	<b>229 031</b>	<b>100%</b>	<b>69 239</b>	<b>76 084</b>	<b>6 844</b>	<b>10%</b>
Cereal preparations and milling products	18 814	22 923	10%	6 746	7 964	1 219	18%
Preparations of fruit, nuts and vegetables	8 415	10 496	5%	3 069	3 917	847	28%
Dairy products	16 990	20 368	9%	5 952	6 589	637	11%
Confectionery and chocolate	8 885	10 249	4%	2 902	3 429	528	18%
Coffee, tea, cocoa and spices	6 180	7 353	3%	2 170	2 641	471	22%
Non-edible for technical use	4 171	4 822	2%	1 597	1 619	22	1%
Horticulture	4 643	4 479	2%	1 765	1 762	- 3	0%
Spirits and liqueurs	8 413	9 744	4%	2 772	2 769	- 3	0%
Sheep and goat	578	679	0%	251	248	- 3	-1%
Sugar and isoglucose	596	619	0%	206	193	- 13	-6%
Other products	120 456	137 299	60%	41 811	44 952	3 141	8%

**TABLE 4**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Apr22	Jan23-Apr23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>198 141</b>	<b>229 031</b>	<b>100%</b>	<b>69 239</b>	<b>76 084</b>	<b>6 844</b>	<b>10%</b>
Cereal preparations and milling products	18 814	22 923	10%	6 746	7 964	1 219	18%
Dairy products	16 990	20 368	9%	5 952	6 589	637	11%
Wine and wine based products	16 641	18 255	8%	5 342	5 504	162	3%
Cereals	11 993	16 867	7%	5 020	5 164	144	3%
Mixed food preparations and ingredients	12 263	14 872	6%	4 607	4 966	359	8%
Pigmeat	14 527	13 782	6%	4 173	4 213	40	1%
Preparations of fruit, nuts and vegetables	8 415	10 496	5%	3 069	3 917	847	28%
Beer, cider and other beverages	10 002	10 917	5%	3 410	3 644	235	7%
Confectionery and chocolate	8 885	10 249	4%	2 902	3 429	528	18%
Vegetables	7 408	8 262	4%	2 778	3 185	407	15%
Pet food and forage crops	7 361	8 573	4%	2 675	2 810	135	5%
Spirits and liqueurs	8 413	9 744	4%	2 772	2 769	- 3	0%
Other animal products	7 531	8 197	4%	2 418	2 762	344	14%
Coffee, tea, cocoa and spices	6 180	7 353	3%	2 170	2 641	471	22%
Tobacco, cigars and cigarettes	5 504	6 153	3%	1 865	2 268	404	22%
Other products	37 214	42 019	18%	13 342	14 258	916	7%



**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-Apr22	Jan23-Apr23		
<b>TOTAL AGRIFOOD</b>	<b>130 122</b>	<b>171 443</b>	<b>100%</b>	<b>51 529</b>	<b>54 896</b>	<b>3 367</b>	<b>7%</b>
Ukraine	6 927	13 206	8%	2 872	4 771	1 899	66%
United Kingdom	11 874	15 263	9%	4 590	4 987	397	9%
United States	9 254	12 250	7%	3 825	4 176	351	9%
Canada	2 834	2 972	2%	785	1 078	293	37%
Côte d'Ivoire	3 259	3 509	2%	1 126	1 387	261	23%
Moldova, Republic of	517	1 104	1%	450	258	- 192	-43%
Philippines	1 019	1 513	1%	539	329	- 209	-39%
China	6 109	9 793	6%	2 903	2 691	- 212	-7%
Argentina	5 171	6 951	4%	1 870	1 611	- 258	-14%
Russian Federation	2 175	2 313	1%	1 044	631	- 413	-40%
Other countries	80 982	102 569	60%	31 526	32 976	1 451	5%

**TABLE 6**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2021	2022	Share 2022	Jan22-Apr22	Jan23-Apr23		
<b>TOTAL AGRIFOOD</b>	<b>130 122</b>	<b>171 443</b>	<b>100%</b>	<b>51 529</b>	<b>54 896</b>	<b>3 367</b>	<b>7%</b>
Brazil	13 548	20 173	12%	5 354	5 380	26	0%
United Kingdom	11 874	15 263	9%	4 590	4 987	397	9%
Ukraine	6 927	13 206	8%	2 872	4 771	1 899	66%
United States	9 254	12 250	7%	3 825	4 176	351	9%
China	6 109	9 793	6%	2 903	2 691	- 212	-7%
Türkiye	5 033	5 623	3%	1 930	2 150	220	11%
Indonesia	5 649	6 709	4%	1 940	2 039	99	5%
Argentina	5 171	6 951	4%	1 870	1 611	- 258	-14%
Switzerland	4 523	4 846	3%	1 567	1 531	- 36	-2%
Morocco	2 639	3 256	2%	1 449	1 432	- 17	-1%
Côte d'Ivoire	3 259	3 509	2%	1 126	1 387	261	23%
Australia	1 901	3 759	2%	1 402	1 346	- 56	-4%
India	2 921	3 662	2%	1 174	1 171	- 3	0%
Canada	2 834	2 972	2%	785	1 078	293	37%
Viet Nam	2 222	3 451	2%	952	1 046	94	10%
Other countries	46 257	56 020	33%	17 791	18 099	309	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-Apr22	Jan23-Apr23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>130 122</b>	<b>171 443</b>	<b>100%</b>	<b>51 529</b>	<b>54 896</b>	<b>3 367</b>	<b>7%</b>
Cereals	6 188	12 744	7%	2 919	4 668	1 749	60%
Tobacco, cigars and cigarettes	2 306	3 704	2%	956	1 502	546	57%
Oilseeds and protein crops	18 250	25 708	15%	7 469	7 938	468	6%
Sugar and isoglucose	878	1 399	1%	301	722	421	140%
Vegetables	4 283	5 069	3%	2 033	2 389	356	18%
Non-edible for technical use	7 489	11 518	7%	3 222	3 167	- 55	-2%
Coffee, tea, cocoa and spices	16 946	21 958	13%	6 977	6 912	- 66	-1%
Margarine and other oils and fats (vegetable)	3 931	5 109	3%	1 644	1 449	- 196	-12%
Mixed food preparations and ingredients	5 590	6 705	4%	2 207	1 999	- 208	-9%
Vegetable oils (oilseeds and palm)	8 239	11 027	6%	3 206	2 678	- 528	-16%
Other products	56 021	66 501	39%	20 593	21 472	879	4%

**TABLE 8**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Apr22	Jan23-Apr23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>130 122</b>	<b>171 443</b>	<b>100%</b>	<b>51 529</b>	<b>54 896</b>	<b>3 367</b>	<b>7%</b>
Oilseeds and protein crops	18 250	25 708	15%	7 469	7 938	468	6%
Fruit and nuts	20 720	22 206	13%	7 240	7 285	45	1%
Coffee, tea, cocoa and spices	16 946	21 958	13%	6 977	6 912	- 66	-1%
Cereals	6 188	12 744	7%	2 919	4 668	1 749	60%
Non-edible for technical use	7 489	11 518	7%	3 222	3 167	- 55	-2%
Vegetable oils (oilseeds and palm)	8 239	11 027	6%	3 206	2 678	- 528	-16%
Vegetables	4 283	5 069	3%	2 033	2 389	356	18%
Preparations of fruit, nuts and vegetables	5 419	6 526	4%	1 983	2 083	100	5%
Mixed food preparations and ingredients	5 590	6 705	4%	2 207	1 999	- 208	-9%
Other animal products	4 668	6 084	4%	1 855	1 914	59	3%
Cereal preparations and milling products	3 856	4 864	3%	1 543	1 596	53	3%
Tobacco, cigars and cigarettes	2 306	3 704	2%	956	1 502	546	57%
Margarine and other oils and fats (vegetable)	3 931	5 109	3%	1 644	1 449	- 196	-12%
Spirits and liqueurs	3 301	4 415	3%	1 218	1 437	220	18%
Pet food and forage crops	2 761	3 517	2%	1 103	1 055	- 49	-4%
Other products	16 175	20 287	12%	5 953	6 824	871	15%

**TABLE 9**

AGRI-FOOD TRADE BALANCE (MILLION EUR)

TRADE BALANCE			
PRODUCT/PERIOD	Exports Jan23- Apr23	Imports Jan23- Apr23	Trade balance Jan23-Apr23
	million EUR		
<b>TOTAL AGRIFOOD</b>	<b>76 084</b>	<b>54 896</b>	<b>21 188</b>
Cereal preparations and milling products	7 964	1 596	6 368
Dairy products	6 589	785	5 804
Wine and wine based products	5 504	507	4 997
Pigmeat	4 213	120	4 093
Mixed food preparations and ingredients	4 966	1 999	2 967
Beer, cider and other beverages	3 644	724	2 920
Confectionery and chocolate	3 429	961	2 468
Preparations of fruit, nuts and vegetables	3 917	2 083	1 833
Pet food and forage crops	2 810	1 055	1 755
Spirits and liqueurs	2 769	1 437	1 332
Olives and olive oil	1 562	262	1 300
Poultry and eggs	1 947	764	1 183
Horticulture	1 762	753	1 009
Other animal products	2 762	1 914	849
Vegetables	3 185	2 389	795
Tobacco, cigars and cigarettes	2 268	1 502	767
Beef and veal	1 457	781	676
Cereals	5 164	4 668	496
Unspecified	317	0	317
Sheep and goat	248	445	- 197
Sugar and isoglucose	193	722	- 529
Margarine and other oils and fats (vegetable)	752	1 449	- 696
Vegetable oils (oilseeds and palm)	1 377	2 678	-1 302
Non-edible for technical use	1 619	3 167	-1 548
Coffee, tea, cocoa and spices	2 641	6 912	-4 271
Fruit and nuts	2 052	7 285	-5 232
Oilseeds and protein crops	971	7 938	-6 966
<i>For info: fish and fish products</i>	<i>2 419</i>	<i>9 752</i>	<i>-7 333</i>
<i>Total agrifood and fish</i>	<i>78 502</i>	<i>64 648</i>	<i>13 855</i>



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