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# MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS in March 2023  
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## Note to the reader

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

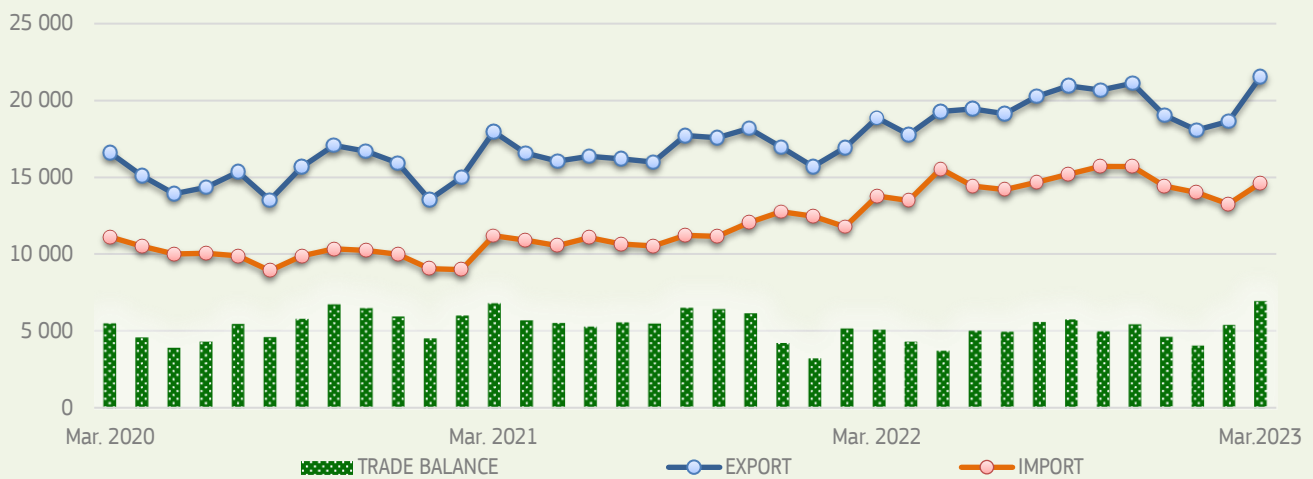
# HIGHLIGHTS: EU agri-food balance continues to improve in March, despite a rebound of imports.

In March 2023, EU agri-food trade surplus continued to progress, reaching +EUR 6.9 billion, a 28% increase month-on-month. This improvement was due to a significant increase of exports, which largely compensated a rebound of imports.

EU exports in March 2023 reached EUR 21.5 billion, a 16% increase compared to February 2023 (and 14% higher than March 2022). Cumulative exports (from January to March 2023) reached EUR 58.2 billion, a 13% increase compared to the same period in 2022. Dynamic exports for cereal preparations, preparations of fruit and nuts and dairy products led the increase for the start of the year.

Conversely, EU imports rose to EUR 14.6 billion in March, increasing by 10% month-on-month and reversing a three-month slide. Cumulative imports in the first quarter of 2023 remained 10% higher compared to the same period in 2022, primarily due to higher imports of cereals as well as oilseeds and protein crops.

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



Source: Comext



# EU AGRI-FOOD EXPORTS

## EXPORTS CONTINUE TO GROW IN MARCH 2023

In March 2023, **EU agri-food exports** increased significantly compared to February to reach **EUR 21.5 billion** (+EUR 2.6 billion compared to March 2022, +14%). Cumulative exports from January to March were **13% higher** in 2023 (+EUR 6.7 billion), compared to the same period in 2022.

This growth in exports was led by increased exports to the **UK** since the beginning of the year. Cumulative exports value from January to March 2023 increased by 14% (+EUR 1.6 billion) compared to the same period in 2022. This growth was led by increased exports of **cereals preparation and milling products** (+EUR 359 million, +30%) and **preparations of fruits, nuts and vegetables** (+EUR 210 million, +30%).

Increased cumulative exports between January and March are also to be noted year-on-year in direction of **China** (+EUR 640 million, +19%, mainly cereal preparations), **Türkiye** (+EUR 416 million, +41%, especially beef and veal), **Saudi Arabia** (+EUR 362 million, +40%, mainly cereals) and **Ukraine** (+EUR 274 million, +45%). In the meantime, EU exports to the **US** remained comparatively stable (+5%). Some significant decreases of exports can be noticed in direction of **Egypt** (-EUR 222 million, -29%, mostly in cereals), **Iran** (-EUR 149 million, -49%) and **Tunisia** (-EUR 79 million, -28%).

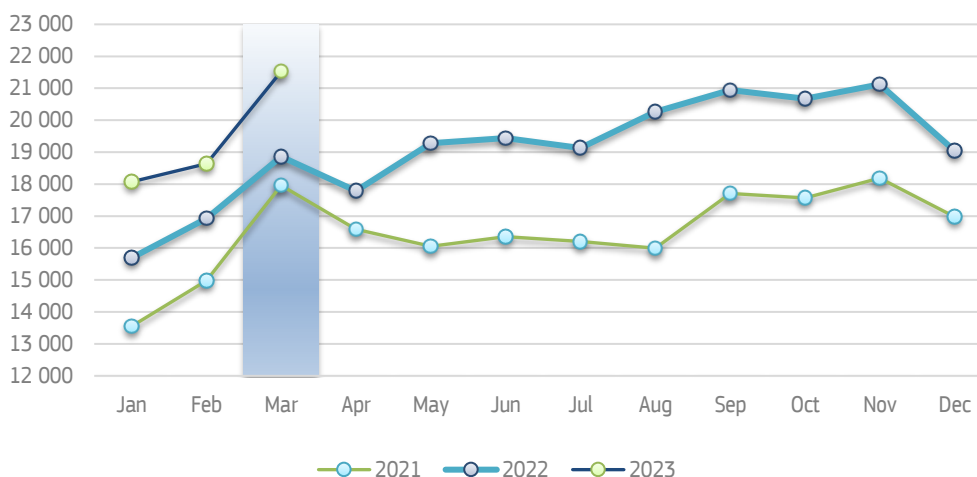
## EXPORTS OF SUGAR CONTINUE TO LAG IN 2023 DESPITE A REBOUND IN MARCH

**Export values** in the first quarter of 2023 were **higher for almost all product categories** compared to the same period in 2022. Exports increased in particular for **cereal preparations and milling products** (+EUR 1.2 billion, +24%), **preparations of fruits, nuts and vegetables** (+EUR 698 million, +31%), as well as **dairy products** (+634 million, +15%). Despite a rebound in March, cumulative export values of **sugar and isoglucose** remained below the level of 2022 (-7%, -EUR 11 million).

However, the results were more contrasted across categories when looking at quantities exported, as **unit values remained significantly higher** for almost all products (+15% on average on all exports).

In volume terms, exports in quarter 1 of 2023 of **sugar and isoglucose** decreased by 41% compared to the same period in 2022, as export unit values have increased. Large decreases were also observed for **pet food and forage crops** (-17%), **pigmeat** (-13%) and **non-edible for technical use** (-11%). On the other hand, exported quantities of **vegetable oils** have increased by 43%, as well as **margarine and other oils and fats** (+22%) and **oilseeds and protein crops** (+14%).

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



# EU AGRI-FOOD IMPORTS

## EU IMPORTS REBOUNDED IN MARCH AFTER A THREE-MONTH SLIDE

In March 2023, **EU imports of agri-food products** increased by 10%, to rise back to EUR 14.6 billion, following three months of decline. Cumulative EU imports over the beginning of the year were 10% higher (+EUR 3.9 billion), compared to the same period in 2022, with increases both in volume and unit values.

**Ukraine** continues to be of the main sources of agri-food imports in the EU, with stable imports month-on-month at EUR 1.3 billion. Cumulative imports between January and March were still significantly higher compared to the same period in 2022 (+61%, +EUR 1.5 billion). It is in large part due to increased imports of **cereals** (+EUR 925 million), **oilseeds and protein crops** (+EUR 550 million), **sugar** (+EUR 105 million) and poultry and eggs (+97 million).

Cumulative imports over the first quarter of 2023 increased from the **UK** (+EUR 374 million, +11%), **Brazil** (+EUR 321 million, +9%), the **US** (+EUR 308 million, +10%) and **Canada** (+299 EUR million, +53%, mostly due to a tripling of **cereals** imports) in comparison to the same period in 2022.

Imports from **Russia** were much below their 2022 level on that period (-44%, -EUR 365 million), due to reduced imports of vegetable oils, cereals, cereal preparations and oilseeds and protein crops.

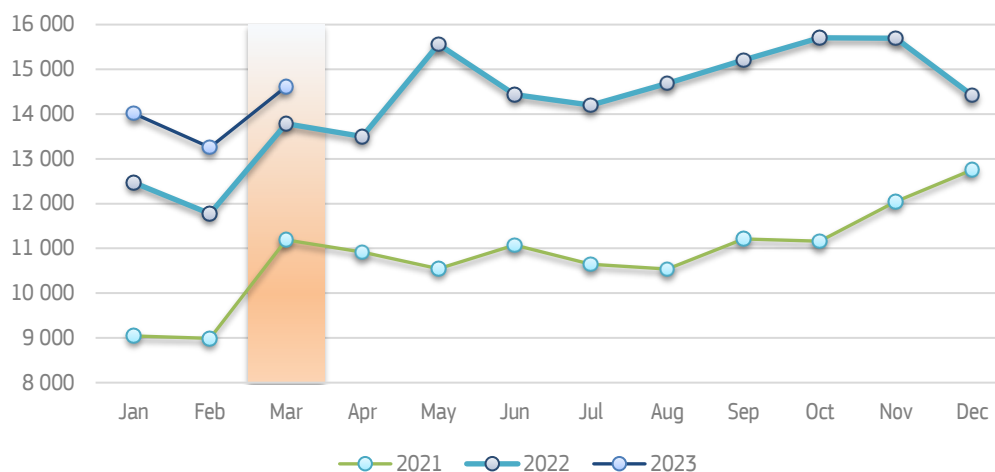
Reduced imports were also observed from **China** (-EUR 166 million, -8%), **Moldova** (-EUR 134 million, -40%) and the **Philippines** (-EUR 111 million, -31%).

## EU IMPORTS OF CEREALS REMAINED HIGH IN MARCH

Cumulative import values of **cereals** (+EUR 14.9 billion, +67%), **oilseed and protein crops** (+EUR 861 million, +16%), as well as **tobacco products** (+EUR 423 million, +57%) increased on the first quarter of 2023 compared to 2022. Imports of **sugar and isoglucose** more than doubled over the same period compared to 2022 (+EUR 310 million). On the contrary, imports of **vegetables oils** (-EUR 385 million, -16%), **mixed food preparations** (-EUR 133 million, -8%) and **margarine and other oils and fats** (-EUR 94 million, -8%) decreased.

In volume terms, imports of **sheep and goat** (+29%, mainly from **UK** and **New Zealand**), **poultry and eggs** (+25%, mainly from **Ukraine** while **UK** has decreased), and **vegetables** (+18%, especially from **Egypt**) also increased over the first quarter of 2023 compared to 2022. Imports decreased for **pigmeat** (-18%, mainly from **UK**), **cereal preparations** (-17%, mainly from **Russia**), **beef and veal** (-16%, mainly from **Argentina**) over that period, while they increased in value, a sign of their inflated unit values.

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



**TABLE 1**

EU AGRI-FOOD EXPORTS – COUNTRIES WITH MOST IMPORTANT CHANGES (million EUR)

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Mar22	Jan23-Mar23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>198 141</b>	<b>229 157</b>	<b>100%</b>	<b>51 476</b>	<b>58 248</b>	<b>6 772</b>	<b>13%</b>
United Kingdom	41 946	47 843	21%	11 078	12 627	1 550	14%
China	17 148	15 794	7%	3 362	4 002	640	19%
Türkiye	3 569	4 159	2%	1 020	1 436	416	41%
Saudi Arabia	3 631	4 816	2%	912	1 274	362	40%
United States	24 518	28 984	13%	6 366	6 702	336	5%
Chile	1 134	1 123	0%	277	241	- 35	-13%
Canada	4 049	4 725	2%	1 052	995	- 57	-5%
Tunisia	558	1 071	0%	282	203	- 79	-28%
Iran, Islamic Republic of	873	1 070	0%	304	155	- 149	-49%
Egypt	2 184	2 843	1%	755	535	- 220	-29%
Other countries	98 531	116 728	51%	26 070	30 078	4 008	15%

**TABLE 2**

EU AGRI-FOOD EXPORTS - TOP 15 EXPORT COUNTRIES (million EUR)

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Mar22	Jan23-Mar23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>198 141</b>	<b>229 157</b>	<b>100%</b>	<b>51 476</b>	<b>58 248</b>	<b>6 772</b>	<b>13%</b>
United Kingdom	41 946	47 843	21%	11 078	12 627	1 550	14%
United States	24 518	28 984	13%	6 366	6 702	336	5%
China	17 148	15 794	7%	3 362	4 002	640	19%
Switzerland	9 858	11 186	5%	2 790	3 062	272	10%
Russian Federation	7 341	7 130	3%	1 837	2 066	230	13%
Japan	7 378	8 296	4%	2 007	2 041	34	2%
Norway	5 412	5 952	3%	1 384	1 507	124	9%
Türkiye	3 569	4 159	2%	1 020	1 436	416	41%
Saudi Arabia	3 631	4 816	2%	912	1 274	362	40%
Korea, Republic of	3 940	4 609	2%	1 132	1 108	- 24	-2%
Morocco	2 368	4 010	2%	916	1 024	107	12%
Canada	4 049	4 725	2%	1 052	995	- 57	-5%
Australia	3 302	3 836	2%	872	939	66	8%
Ukraine	3 109	2 926	1%	613	887	274	45%
Algeria	2 948	3 605	2%	724	881	158	22%
Other countries	57 623	71 287	31%	15 412	17 697	2 285	15%

**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-Mar22	Jan23-Mar23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>198 141</b>	<b>229 157</b>	<b>100%</b>	<b>51 476</b>	<b>58 248</b>	<b>6 772</b>	<b>13%</b>
Cereal preparations and milling products	18 814	22 924	10%	5 021	6 209	1 188	24%
Preparations of fruit, nuts and vegetables	8 415	10 496	5%	2 275	2 973	698	31%
Dairy products	16 990	20 369	9%	4 353	4 986	634	15%
Confectionery and chocolate	8 885	10 249	4%	2 237	2 714	477	21%
Vegetables	7 408	8 262	4%	2 079	2 499	420	20%
Spirits and liqueurs	8 413	9 744	4%	2 022	2 076	54	3%
Horticulture	4 643	4 479	2%	1 324	1 360	36	3%
Non-edible for technical use	4 171	4 822	2%	1 210	1 242	32	3%
Sheep and goat	578	679	0%	175	188	14	8%
Sugar and isoglucose	596	619	0%	162	151	- 11	-7%
Other products	119 228	136 514	60%	30 618	33 850	3 232	11%

**TABLE 4**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-Mar22	Jan23-Mar23	Difference	
<b>TOTAL AGRIFOOD</b>	<b>198 141</b>	<b>229 157</b>	<b>100%</b>	<b>51 476</b>	<b>58 248</b>	<b>6 772</b>	<b>13%</b>
Cereal preparations and milling products	18 814	22 924	10%	5 021	6 209	1 188	24%
Dairy products	16 990	20 369	9%	4 353	4 986	634	15%
Wine and wine based products	16 641	18 255	8%	3 871	4 049	178	5%
Cereals	11 993	16 867	7%	3 726	3 899	174	5%
Mixed food preparations and ingredients	12 263	14 872	6%	3 425	3 818	393	11%
Pigmeat	14 527	13 782	6%	3 138	3 266	127	4%
Preparations of fruit, nuts and vegetables	8 415	10 496	5%	2 275	2 973	698	31%
Beer, cider and other beverages	10 002	10 918	5%	2 535	2 750	216	9%
Confectionery and chocolate	8 885	10 249	4%	2 237	2 714	477	21%
Vegetables	7 408	8 262	4%	2 079	2 499	420	20%
Pet food and forage crops	7 361	8 573	4%	2 000	2 162	163	8%
Other animal products	7 531	8 197	4%	1 793	2 092	299	17%
Spirits and liqueurs	8 413	9 744	4%	2 022	2 076	54	3%
Coffee, tea, cocoa and spices	6 180	7 353	3%	1 632	2 022	390	24%
Tobacco, cigars and cigarettes	5 504	6 153	3%	1 460	1 737	278	19%
Other products	37 214	42 143	18%	9 911	10 995	1 084	11%

**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-Mar22	Jan23-Mar23		
<b>TOTAL AGRIFOOD</b>	<b>130 122</b>	<b>171 437</b>	<b>100%</b>	<b>38 031</b>	<b>41 887</b>	<b>3 855</b>	<b>10%</b>
Ukraine	6 927	13 203	8%	2 393	3 862	1 469	61%
United Kingdom	11 874	15 263	9%	3 392	3 766	374	11%
Brazil	13 548	20 173	12%	3 745	4 066	321	9%
United States	9 254	12 250	7%	2 937	3 245	308	10%
Canada	2 834	2 972	2%	564	863	299	53%
Argentina	5 171	6 951	4%	1 290	1 211	- 79	-6%
Philippines	1 019	1 513	1%	353	243	- 111	-31%
Moldova, Republic of	517	1 104	1%	338	204	- 134	-40%
China	6 109	9 793	6%	2 206	2 040	- 166	-8%
Russian Federation	2 175	2 313	1%	835	470	- 365	-44%
Other countries	70 693	85 903	50%	19 977	21 917	1 940	10%

**TABLE 6**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2021	2022	Share 2022	Jan22-Mar22	Jan23-Mar23		
<b>TOTAL AGRIFOOD</b>	<b>130 122</b>	<b>171 437</b>	<b>100%</b>	<b>38 031</b>	<b>41 887</b>	<b>3 855</b>	<b>10%</b>
Brazil	13 548	20 173	12%	3 745	4 066	321	9%
Ukraine	6 927	13 203	8%	2 393	3 862	1 469	61%
United Kingdom	11 874	15 263	9%	3 392	3 766	374	11%
United States	9 254	12 250	7%	2 937	3 245	308	10%
China	6 109	9 793	6%	2 206	2 040	- 166	-8%
Türkiye	5 033	5 623	3%	1 482	1 704	221	15%
Indonesia	5 649	6 709	4%	1 450	1 568	118	8%
Argentina	5 171	6 951	4%	1 290	1 211	- 79	-6%
Switzerland	4 523	4 846	3%	1 201	1 200	- 1	0%
Australia	1 901	3 759	2%	936	1 159	224	24%
Morocco	2 639	3 256	2%	1 016	1 072	56	5%
Côte d'Ivoire	3 259	3 509	2%	817	987	170	21%
Canada	2 834	2 972	2%	564	863	299	53%
India	2 921	3 662	2%	852	853	1	0%
Viet Nam	2 222	3 451	2%	706	782	76	11%
Other countries	46 257	56 017	33%	13 043	13 509	466	4%



**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-Mar22	Jan23-Mar23		
<b>TOTAL AGRIFOOD</b>	<b>130 122</b>	<b>171 437</b>	<b>100%</b>	<b>38 031</b>	<b>41 887</b>	<b>3 855</b>	<b>10%</b>
Cereals	6 188	12 744	7%	2 223	3 713	1 490	67%
Oilseeds and protein crops	18 250	25 708	15%	5 389	6 250	861	16%
Tobacco, cigars and cigarettes	2 306	3 704	2%	738	1 161	423	57%
Sugar and isoglucose	878	1 399	1%	223	533	310	139%
Vegetables	4 283	5 069	3%	1 482	1 780	298	20%
Horticulture	1 928	2 096	1%	607	593	- 15	-2%
Coffee, tea, cocoa and spices	16 946	21 958	13%	5 195	5 161	- 34	-1%
Margarine and other oils and fats (vegetable)	3 931	5 109	3%	1 173	1 079	- 94	-8%
Mixed food preparations and ingredients	5 590	6 706	4%	1 651	1 517	- 133	-8%
Vegetable oils (oilseeds and palm)	8 239	11 027	6%	2 409	2 024	- 385	-16%
Other products	61 582	75 917	44%	16 942	18 077	1 135	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-Mar22	Jan23-Mar23		
<b>TOTAL AGRIFOOD</b>	<b>130 122</b>	<b>171 437</b>	<b>100%</b>	<b>38 031</b>	<b>41 887</b>	<b>3 855</b>	<b>10%</b>
Oilseeds and protein crops	18 250	25 708	15%	5 389	6 250	861	16%
Fruit and nuts	20 720	22 204	13%	5 285	5 429	144	3%
Coffee, tea, cocoa and spices	16 946	21 958	13%	5 195	5 161	- 34	-1%
Cereals	6 188	12 744	7%	2 223	3 713	1 490	67%
Non-edible for technical use	7 489	11 518	7%	2 365	2 420	55	2%
Vegetable oils (oilseeds and palm)	8 239	11 027	6%	2 409	2 024	- 385	-16%
Vegetables	4 283	5 069	3%	1 482	1 780	298	20%
Preparations of fruit, nuts and vegetables	5 419	6 526	4%	1 496	1 576	81	5%
Mixed food preparations and ingredients	5 590	6 706	4%	1 651	1 517	- 133	-8%
Other animal products	4 668	6 084	4%	1 397	1 465	67	5%
Cereal preparations and milling products	3 856	4 862	3%	1 176	1 227	51	4%
Tobacco, cigars and cigarettes	2 306	3 704	2%	738	1 161	423	57%
Spirits and liqueurs	3 301	4 415	3%	890	1 087	197	22%
Margarine and other oils and fats (vegetable)	3 931	5 109	3%	1 173	1 079	- 94	-8%
Pet food and forage crops	2 761	3 517	2%	831	817	- 14	-2%
Other products	16 175	20 287	12%	4 331	5 180	849	20%

TABLE 9

## AGRI-FOOD TRADE BALANCE (MILLION EUR)

TRADE BALANCE			
PRODUCT/PERIOD	Exports Jan23- Mar23	Imports Jan23- Mar23	Trade balance Jan23-Mar23
	million EUR		
<b>TOTAL AGRIFOOD</b>	<b>58 248</b>	<b>41 887</b>	<b>16 361</b>
Cereal preparations and milling products	6 209	1 227	4 981
Dairy products	4 986	621	4 365
Wine and wine based products	4 049	388	3 661
Pigmeat	3 266	88	3 177
Mixed food preparations and ingredients	3 818	1 517	2 301
Beer, cider and other beverages	2 750	535	2 215
Confectionery and chocolate	2 714	747	1 967
Preparations of fruit, nuts and vegetables	2 973	1 576	1 396
Pet food and forage crops	2 162	817	1 345
Olives and olive oil	1 211	193	1 019
Spirits and liqueurs	2 076	1 087	989
Poultry and eggs	1 474	595	879
Horticulture	1 360	593	767
Vegetables	2 499	1 780	719
Other animal products	2 092	1 465	628
Tobacco, cigars and cigarettes	1 737	1 161	577
Beef and veal	1 084	558	526
Unspecified	243	0	243
Cereals	3 899	3 713	186
Sheep and goat	188	330	- 141
Sugar and isoglucose	151	533	- 382
Margarine and other oils and fats (vegetable)	589	1 079	- 489
Vegetable oils (oilseeds and palm)	1 096	2 024	- 928
Non-edible for technical use	1 242	2 420	-1 179
Coffee, tea, cocoa and spices	2 022	5 161	-3 139
Fruit and nuts	1 572	5 429	-3 858
Oilseeds and protein crops	786	6 250	-5 464
<i>Fish and fish products</i>	<i>1 915</i>	<i>7 444</i>	<i>-5 529</i>
<b>TOTAL AGRIFOOD AND FISH</b>	<b>60 163</b>	<b>49 331</b>	<b>10 832</b>



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