



European
Commission



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS in May 2023
Publication: August 2023

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Note to the reader

The latest available consolidated trade data at EU level cover market developments in May 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 rebounds in May 2023.

After it slowed down in April, EU agri-food trade progressed in May 2023, with an increase of both imports and exports. EU agri-food surplus increased by 2% month-on-month in May, reaching +EUR 5.1 billion.

EU exports increased by 8% month-on-month and reached EUR 19.4 billion in May 2023, a similar level than in May 2022. Cumulative exports (January to May 2023) reached EUR 95.7 billion (+8% compared to the same period in 2022), in particular for cereal preparations and preparations of fruit and nuts.

EU imports increased as well in May and reached EUR 14.3 billion, a 10% increase month-on-month. They remained 8% below their level in May 2022, as unit values of agri-food imports have decreased over the year. Cumulative imports over the beginning of 2023 remained 3% higher compared to the same period in 2022.

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



Source: Comext



EU AGRI-FOOD EXPORTS

EU AGRI-FOOD EXPORTS INCREASED IN MAY

EU agri-food exports rebounded in May and reached EUR 19.4 billion, a similar level than in May 2022 and an 8% increase month-on-month. Exports increased across most product categories compared to April, at the exception of cereals, vegetables and oilseeds and protein crops.

Cumulative exports from January to May 2023 grew by EUR 7.2 billion (+8%) compared to the same period last year. The **UK** strengthened its position as the first destination of EU agri-food exports, with a EUR 2 billion increase (+10%), mostly in cereal preparations, preparations of fruits and vegetables, and vegetables.

The **United States** remained the 2nd destination of EU exports, despite a decrease of exports of EUR 598 million year-on-year (-5%). A large decrease of exports of spirits and liqueurs (-EUR 543 million, -34% mainly due to less volume exported) explains this evolution.

China remained the 3rd destination of EU exports, with an increase of EUR 773 million (+14%). Exports of cereals to China more than doubled (+EUR 380 million) over the beginning of the year compared to last year.

EU agri-food exports to **Türkiye** grew by 45% (+EUR 721 million), as exports of beef and veal went from

EUR 11 million between January and May 2022, to EUR 224 million in the same period in 2023.

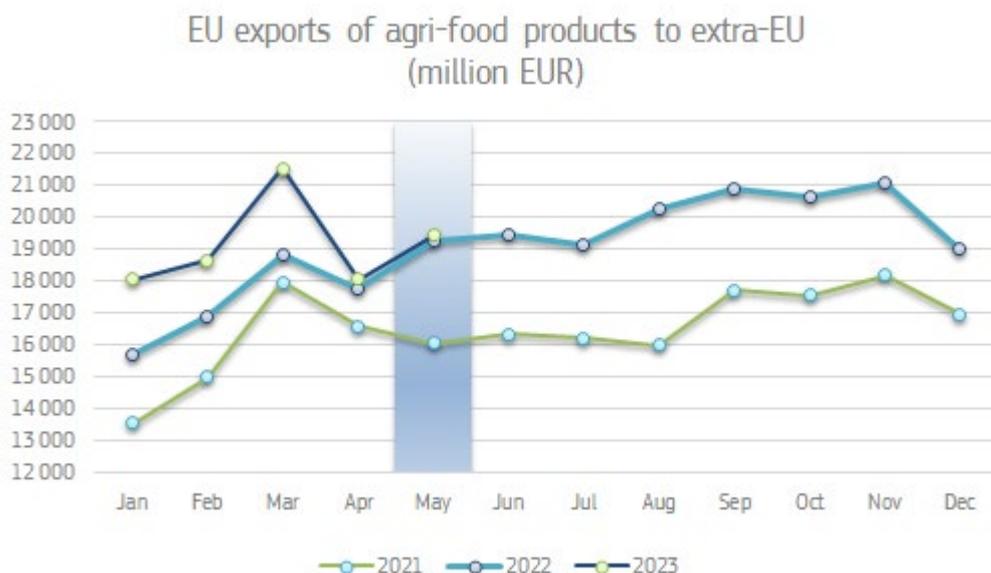
Large reductions of cumulative exports towards **Egypt** (-EUR 382 million, -32%), **Tunisia** (-EUR 211 million, -38%) and **Iran** (-EUR 192 million, -46%) can be observed between January and May 2023, in comparison to the same period last year.

HIGH EXPORT VOLUMES FOR CROPS, DESPITE REDUCTIONS IN OTHER PRODUCTS

The cumulative value of EU exports increased for most products between January and May 2023 compared to the same period in 2022. Exports of **cereal preparations and milling products** increased by EUR 1.3 billion (+15%), **preparations of fruits and vegetables** by EUR 974 million (+25%) and **confectionary and chocolate** by EUR 645 million (+18%). However, most of these increases are explained by higher export prices, while volumes exported remained stable or even decreased.

Notable exceptions are for **vegetable oils, oilseeds and protein crops**, and **cereals**, for which export volumes increased respectively by 40%, 23% and 16%, while their unit value decreased.

Exports of **spirits and liqueurs** decreased by 4% in value and 11% in volume. Other moderate reduction of export values can be observed for **pigmeat** and **sugar and isoglucose**, as increases in prices partly compensated for lower export volumes.



EU AGRI-FOOD IMPORTS

EU AGRI-FOOD IMPORTS REMAINED BELOW THEIR 2022 LEVEL IN MAY 2023

EU **agri-food imports increased** in May, at EUR 14.3 billion, a 10% growth month-on-month (+EUR 1.3 billion). Imports remained **8% below their level of May 2022**. Cumulative imports from January to May 2023 are still 3% higher (+EUR 2.2 billion) compared to the same period last year, due to high import values in the beginning of 2023.

Imports from **Ukraine** continued to be at a high level over the beginning of the year (+EUR 2.1 billion, +60% from January to May 2023, compared to the same period last year). It remains the third source of EU agri-food imports over the beginning of the year, with large increase in flows of cereals, oilseeds, poultry and eggs and sugar & isoglucose.

Brazil remains the first source of EU imports, despite a EUR 384 million reduction of imports (-5%), mostly in soya beans and coffee. The **UK** is the second source of EU agri-food imports, as they grew by EUR 388 million (+7%), mostly for cereals (+EUR 199 million, +70%).

Imports from **Canada** also increased by 35% (+EUR 360 million) over the beginning of the year compared to 2022, mostly for cereals. Imports from **Egypt** increased by 45% (+EUR 285 million), mostly for fruit and nuts and vegetables.

Imports also decreased from **Argentina** (-EUR 524 million, -21%, mostly in soya meals), **Russia** (-EUR 474 million, -38%, mainly in vegetable oils and cereal preparations), **Australia** (-EUR 307 million, -16%; mainly in rapeseed) and **Moldova** (-EUR 260 million, -46%).

IMPORTS OF SUGAR AND CEREALS REMAIN HIGH

Imports of **cereals** stayed high over the beginning of the year, with EUR 1.7 billion increase from January to May 2023 compared to last year and a 48% increase in volume. This was also the case for **sugar** with a 158% increase in value (+EUR 598 million), as volumes imported doubled. Imports of **tobacco products** increased by 53% (+EUR 657 million).

Imports of **vegetable oils** have decreased from January to May 2023 compared to the same period in 2022, both in value (-EUR 1 billion, -23%) and in volume (-10%). A similar situation can be observed for imports of **mixed food preparations** (-EUR 302 million, -11% in value, -14% in volume). Imports of **margarine and other oils and fats** decreased by EUR 337 million (-16%). However, this is explained by lower imports prices as volumes have increased (+9%).

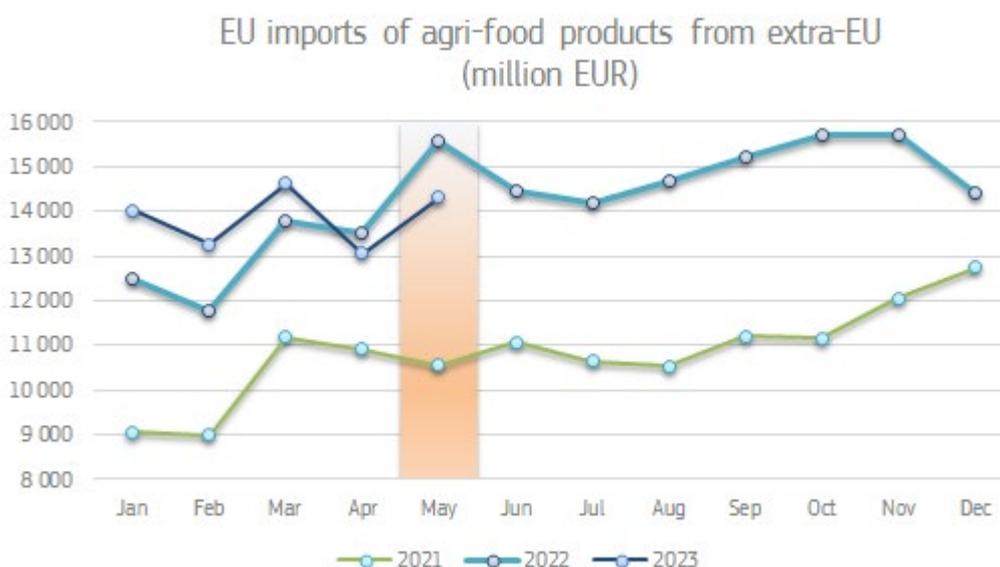


TABLE 1

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-May22	Jan23-May23	Difference	
TOTAL AGRIFOOD	198 141	229 031	100%	88 505	95 736	7 231	8%
United Kingdom	41 946	47 841	21%	19 142	21 133	1 991	10%
China	17 148	15 794	7%	5 697	6 471	773	14%
Türkiye	3 569	4 159	2%	1 607	2 328	721	45%
Russian Federation	7 341	7 129	3%	2 596	3 088	492	19%
Ukraine	3 109	2 926	1%	1 027	1 412	384	37%
Canada	4 049	4 725	2%	1 852	1 668	- 184	-10%
Iran, Islamic Republic of	873	1 070	0%	423	230	- 192	-46%
Tunisia	558	1 071	0%	559	349	- 211	-38%
Egypt	2 184	2 843	1%	1 178	796	- 382	-32%
United States	24 518	28 983	13%	11 596	10 999	- 598	-5%
Other countries	92 845	112 489	49%	42 826	47 263	4 436	10%

TABLE 2

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-May22	Jan23-May23	Difference	
TOTAL AGRIFOOD	198 141	229 031	100%	88 505	95 736	7 231	8%
United Kingdom	41 946	47 841	21%	19 142	21 133	1 991	10%
United States	24 518	28 983	13%	11 596	10 999	- 598	-5%
China	17 148	15 794	7%	5 697	6 471	773	14%
Switzerland	9 858	11 186	5%	4 736	5 004	268	6%
Japan	7 378	8 296	4%	3 326	3 436	110	3%
Russian Federation	7 341	7 129	3%	2 596	3 088	492	19%
Norway	5 412	5 889	3%	2 386	2 470	83	3%
Türkiye	3 569	4 159	2%	1 607	2 328	721	45%
Saudi Arabia	3 631	4 816	2%	1 567	1 920	353	23%
Korea, Republic of	3 940	4 608	2%	1 958	1 910	- 48	-2%
Morocco	2 368	4 009	2%	1 650	1 702	52	3%
Canada	4 049	4 725	2%	1 852	1 668	- 184	-10%
Australia	3 302	3 836	2%	1 444	1 519	75	5%
Ukraine	3 109	2 926	1%	1 027	1 412	384	37%
Algeria	2 948	3 605	2%	1 457	1 403	- 54	-4%
Other countries	57 623	71 227	31%	26 462	29 274	2 812	11%

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-May22	Jan23-May23	Difference	
TOTAL AGRIFOOD	198 141	229 031	100%	88 505	95 736	7 231	8%
Cereal preparations and milling products	18 814	22 923	10%	8 649	9 934	1 286	15%
Preparations of fruit, nuts and vegetables	8 415	10 496	5%	3 942	4 915	974	25%
Confectionery and chocolate	8 885	10 249	4%	3 631	4 276	645	18%
Dairy products	16 990	20 369	9%	7 739	8 336	597	8%
Coffee, tea, cocoa and spices	6 180	7 353	3%	2 777	3 321	543	20%
Sheep and goat	578	679	0%	317	308	- 9	-3%
Sugar and isoglucose	596	619	0%	257	243	- 14	-5%
Non-edible for technical use	4 171	4 822	2%	2 022	2 003	- 19	-1%
Pigmeat	14 527	13 782	6%	5 328	5 263	- 65	-1%
Spirits and liqueurs	8 413	9 744	4%	3 677	3 542	- 135	-4%
Other products	110 572	127 996	56%	50 166	53 595	3 428	7%

TABLE 4

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-May22	Jan23-May23	Difference	
TOTAL AGRIFOOD	198 141	229 031	100%	88 505	95 736	7 231	8%
Cereal preparations and milling products	18 814	22 923	10%	8 649	9 934	1 286	15%
Dairy products	16 990	20 369	9%	7 739	8 336	597	8%
Wine and wine based products	16 641	18 255	8%	6 994	7 075	81	1%
Cereals	11 993	16 867	7%	6 278	6 580	302	5%
Mixed food preparations and ingredients	12 263	14 872	6%	5 876	6 268	393	7%
Pigmeat	14 527	13 782	6%	5 328	5 263	- 65	-1%
Preparations of fruit, nuts and vegetables	8 415	10 496	5%	3 942	4 915	974	25%
Beer, cider and other beverages	10 002	10 917	5%	4 382	4 696	314	7%
Confectionery and chocolate	8 885	10 249	4%	3 631	4 276	645	18%
Vegetables	7 408	8 262	4%	3 398	3 857	459	14%
Spirits and liqueurs	8 413	9 744	4%	3 677	3 542	- 135	-4%
Pet food and forage crops	7 361	8 573	4%	3 369	3 489	119	4%
Other animal products	7 531	8 197	4%	3 091	3 457	366	12%
Coffee, tea, cocoa and spices	6 180	7 353	3%	2 777	3 321	543	20%
Tobacco, cigars and cigarettes	5 504	6 153	3%	2 334	2 854	521	22%
Other products	37 214	42 019	18%	17 041	17 874	834	5%

TABLE 5

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-May22	Jan23-May23	Difference	
TOTAL AGRIFOOD	130 122	171 442	100%	67 091	69 266	2 175	3%
Ukraine	6 927	13 206	8%	3 530	5 646	2 116	60%
United Kingdom	11 874	15 263	9%	5 863	6 250	388	7%
Canada	2 834	2 972	2%	1 015	1 375	360	35%
Egypt	1 181	1 371	1%	627	911	285	45%
Türkiye	5 033	5 623	3%	2 352	2 625	273	12%
Moldova, Republic of	517	1 104	1%	571	310	- 260	-46%
Australia	1 901	3 759	2%	1 930	1 623	- 307	-16%
Brazil	13 548	20 172	12%	7 566	7 182	- 384	-5%
Russian Federation	2 175	2 313	1%	1 246	772	- 474	-38%
Argentina	5 171	6 951	4%	2 538	2 014	- 524	-21%
Other countries	78 960	98 708	58%	39 854	40 557	703	2%

TABLE 6

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22-May22	Jan23-May23	Difference	
TOTAL AGRIFOOD	130 122	171 442	100%	67 091	69 266	2 175	3%
Brazil	13 548	20 172	12%	7 566	7 182	- 384	-5%
United Kingdom	11 874	15 263	9%	5 863	6 250	388	7%
Ukraine	6 927	13 206	8%	3 530	5 646	2 116	60%
United States	9 254	12 250	7%	4 944	5 187	243	5%
China	6 109	9 793	6%	3 719	3 548	- 172	-5%
Türkiye	5 033	5 623	3%	2 352	2 625	273	12%
Indonesia	5 649	6 709	4%	2 575	2 528	- 47	-2%
Argentina	5 171	6 951	4%	2 538	2 014	- 524	-21%
Switzerland	4 523	4 846	3%	1 957	1 920	- 38	-2%
Morocco	2 639	3 256	2%	1 893	1 808	- 85	-4%
Côte d'Ivoire	3 259	3 509	2%	1 448	1 713	265	18%
Australia	1 901	3 759	2%	1 930	1 623	- 307	-16%
India	2 921	3 662	2%	1 533	1 510	- 23	-1%
Canada	2 834	2 972	2%	1 015	1 375	360	35%
Viet Nam	2 222	3 451	2%	1 292	1 367	74	6%
Other countries	46 257	56 019	33%	22 936	22 971	35	0%

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-May22	Jan23-May23		
TOTAL AGRIFOOD	130 122	171 442	100%	67 091	69 266	2 175	3%
Cereals	6 188	12 745	7%	3 958	5 659	1 701	43%
Tobacco, cigars and cigarettes	2 306	3 704	2%	1 234	1 891	657	53%
Sugar and isoglucose	878	1 399	1%	379	977	598	158%
Vegetables	4 283	5 069	3%	2 469	2 958	489	20%
Spirits and liqueurs	3 301	4 415	3%	1 570	1 889	319	20%
Oilseeds and protein crops	18 250	25 707	15%	10 208	10 014	- 193	-2%
Coffee, tea, cocoa and spices	16 946	21 958	13%	8 931	8 662	- 269	-3%
Mixed food preparations and ingredients	5 590	6 705	4%	2 829	2 528	- 302	-11%
Margarine and other oils and fats (vegetable)	3 931	5 109	3%	2 118	1 781	- 337	-16%
Vegetable oils (oilseeds and palm)	8 239	11 027	6%	4 302	3 303	- 999	-23%
Other products	60 209	73 603	43%	29 091	29 602	511	2%

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-May22	Jan23-May23		
TOTAL AGRIFOOD	130 122	171 442	100%	67 091	69 266	2 175	3%
Oilseeds and protein crops	18 250	25 707	15%	10 208	10 014	- 193	-2%
Fruit and nuts	20 720	22 206	13%	9 354	9 425	71	1%
Coffee, tea, cocoa and spices	16 946	21 958	13%	8 931	8 662	- 269	-3%
Cereals	6 188	12 745	7%	3 958	5 659	1 701	43%
Non-edible for technical use	7 489	11 518	7%	4 206	4 020	- 186	-4%
Vegetable oils (oilseeds and palm)	8 239	11 027	6%	4 302	3 303	- 999	-23%
Vegetables	4 283	5 069	3%	2 469	2 958	489	20%
Preparations of fruit, nuts and vegetables	5 419	6 526	4%	2 506	2 656	150	6%
Mixed food preparations and ingredients	5 590	6 705	4%	2 829	2 528	- 302	-11%
Other animal products	4 668	6 084	4%	2 365	2 434	69	3%
Cereal preparations and milling products	3 856	4 864	3%	1 976	1 986	10	1%
Tobacco, cigars and cigarettes	2 306	3 704	2%	1 234	1 891	657	53%
Spirits and liqueurs	3 301	4 415	3%	1 570	1 889	319	20%
Margarine and other oils and fats (vegetable)	3 931	5 109	3%	2 118	1 781	- 337	-16%
Pet food and forage crops	2 761	3 517	2%	1 412	1 328	- 84	-6%
Other products	16 175	20 287	12%	7 651	8 730	1 080	14%

TABLE 9

AGRI-FOOD TRADE BALANCE (MILLION EUR)

TRADE BALANCE			
PRODUCT/PERIOD	Exports Jan23- May23	Imports Jan23- May23	Trade balance Jan23-May23
	million EUR		
TOTAL AGRIFOOD	95 736	69 266	26 471
Cereal preparations and milling products	9 934	1 986	7 949
Dairy products	8 336	958	7 378
Wine and wine based products	7 075	639	6 436
Pigmeat	5 263	156	5 106
Beer, cider and other beverages	4 696	947	3 748
Mixed food preparations and ingredients	6 268	2 528	3 740
Confectionery and chocolate	4 276	1 209	3 068
Preparations of fruit, nuts and vegetables	4 915	2 656	2 259
Pet food and forage crops	3 489	1 328	2 160
Spirits and liqueurs	3 542	1 889	1 653
Olives and olive oil	1 993	348	1 646
Poultry and eggs	2 464	989	1 475
Horticulture	2 169	945	1 224
Other animal products	3 457	2 434	1 023
Tobacco, cigars and cigarettes	2 854	1 891	963
Cereals	6 580	5 659	921
Vegetables	3 857	2 958	898
Beef and veal	1 867	991	876
Unspecified	425	0	425
Sheep and goat	308	571	- 263
Sugar and isoglucose	243	977	- 734
Margarine and other oils and fats (vegetable)	935	1 781	- 846
Vegetable oils (oilseeds and palm)	1 749	3 303	-1 554
Non-edible for technical use	2 003	4 020	-2 017
Coffee, tea, cocoa and spices	3 321	8 662	-5 342
Fruit and nuts	2 544	9 425	-6 880
Oilseeds and protein crops	1 174	10 014	-8 841
<i>For info: fish and fish products</i>	<i>3 022</i>	<i>12 392</i>	<i>-9 370</i>
<i>Total agrifood and fish</i>	<i>98 758</i>	<i>81 657</i>	<i>17 100</i>



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