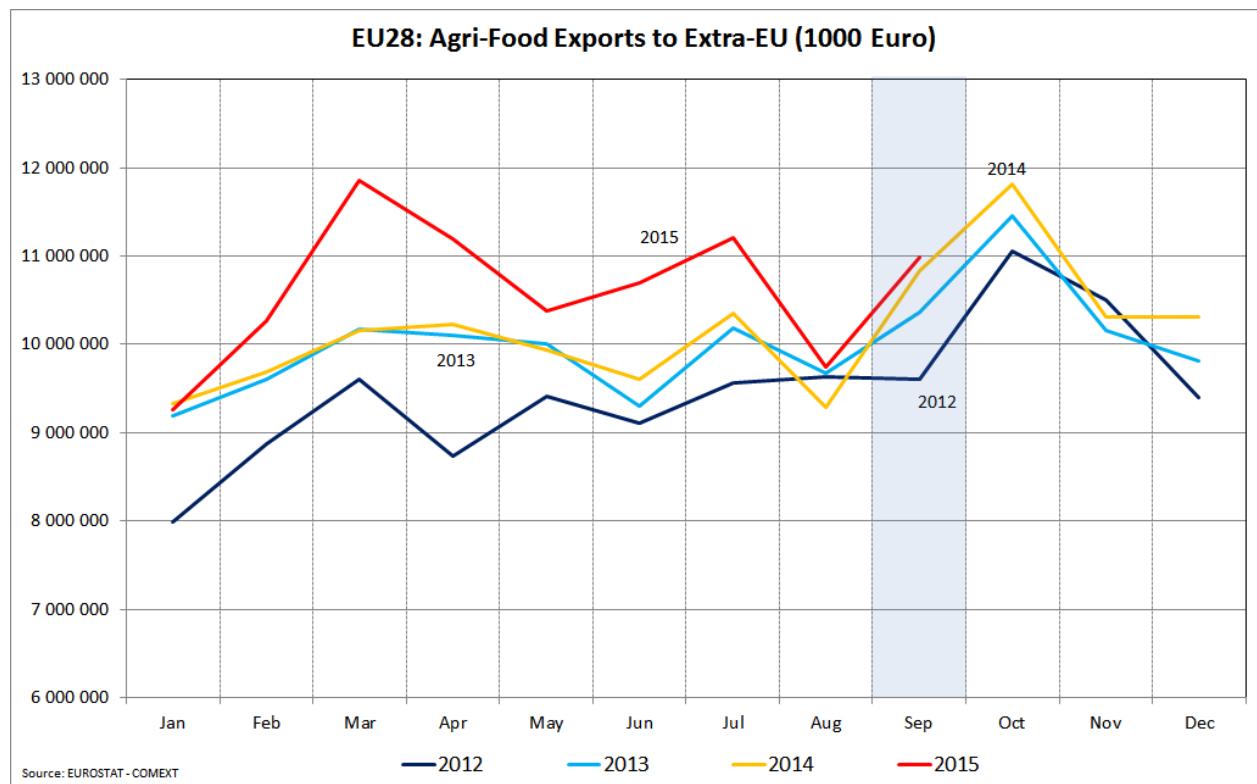


## Monitoring EU Agri-Food Trade: Development until September 2015



### September 2015 - EU Agri-Food Exports back on track

After a notable drop in August, the value of EU agri-food exports has resumed the positive trend in **September 2015**. Export values increased by EUR 1.2 billion (+13%), in particular to the **US** (EUR + 295 million; +19%) and **China** (EUR +141 million; +18%), while export values to some **North African** destinations went down moderately.

Most impressive increases in monthly export values were witnessed for **wine** (EUR +205 million, almost compensating the drop in August), **spirits and liqueurs** (EUR +183 million) and for **chocolate and confectionaries** (EUR +96 million).

In September 2015, not only agri-food exports but also **imports** to the EU went up compared to the previous month (EUR +388 million; +4.5%). In particular, values of oilseeds other than soyabeans, coffee and tea, and cocoa beans were at a higher level in September compared to August 2015. EU imports from the US, Turkey and Switzerland went up the most, while imports from Argentina and Ukraine went down in value terms.

The **trade balance** for all agri-food products in September 2015 increased to almost EUR 2 billion.

## 12-month period: Exports still at record level

In the 12 months period October 2014 to September 2015, EU agri-food exports to third countries attained the amount of EUR 128 billion, meaning an increase by 6.0% in value compared to the same period one year ago. Outstanding export values were achieved in October 2014 and in March and July 2015.

Over the 12 months period, major gains in export values were achieved in the **USA** (+18%) and **China** (+38%), now second export destination gaining the place of Russia, as well as on other key Asian markets such as **South Korea** (+26%) and **Hong Kong** (+9%). Also, agri-food exports to **Turkey** increased significantly during the considered period (+27%). Exports to countries such as Saudi Arabia, Egypt and the United Arab Emirates also increased in October 2014 to September 2015 compared to the same period one year ago. Due to the ban, **Russia** fell down to fourth position as the overall EU agri-food exports to Russia decreased from EUR 10.4 billion to EUR 5.9 billion (-43%) over the considered period.

Analysing the 12 months export performance per product category, export values increased in particular for **cereals** other than wheat (EUR +1.2 billion; +66%), **wine** (EUR +768 million; +8%), **spirits and liqueurs** (EUR +678 million; +7%) as well as for **infant food** and other milk and cereals preparations (EUR +561 million; +10%) and for **hides, skins and furskins** (EUR +532 million; +23%)

On the negative side, **milk powders, cheese, fruit** and **vegetables** lost in export values over the 12 months period, all of them products concerned by the Russian embargo. Also exports in oilseeds other than soyabean suffered a loss by 13% in export values, although at lower absolute value compared to the products mentioned before.

## EU Agri-Food Imports: slight increase over last 12 months

In the period October 2014 to September 2015 total agri-food imports from third countries amounted to almost €111 billion, corresponding to an increase by 8% compared to the same period one year ago. On a monthly base, imports went up in September 2015 compared to August 2015 by 4.5%.

Analysing the origin, imports from **Brazil**, the traditional first EU supplier, remained quite stable, with a slight increase by 2% in September 2015 compared to August. Imports from the **USA**, which is already an important supplier, further increased (EUR +1.5 billion; +14.7%) over the last 12 months. Remarkable increase in imports was recorded from **Turkey** (EUR +972 million; +25%) and from **Vietnam** (EUR +433 million; +24%). On the other hand imports from **Ukraine** decreased (EUR -610 million; -15%).

Analysing 12-month-data per product category, total imports of commodities in value terms remained almost stable (-0.5%), but, in detail, imports of **cereals** other than wheat and rice decreased remarkably (EUR -1.3 billion; -40%), as well as for: **soybeans** (EUR -559 million; -10%), beet and cane **sugar** (EUR -403 million; -23%), oilcakes and palm oil. On the other hand, imports of unroasted **coffee**, tea and mate, increased sizeably (EUR +1.8 billion; +28%) as well as imports of **cocoa beans** and **wheat**.

For other products than commodities, increases were registered in particular for **tropical fruit, nuts** and **spices** (EUR +2.6 billion; +27%), fruit and vegetable preparations (EUR +788 million; +27%), as well as fresh fruit (EUR +598 million; +11%), fresh vegetables (EUR +349 million; +9%), and raw tobacco (EUR +305 million; +13%).

It is worth also to underline the outstanding increase of **olive oil** (especially from **Tunisia**), which grew almost by four times from EUR 139 million in the period October 2013 to September 2014 to EUR 681 million in the same period one year later.

(publication date: 4 December 2015)

## Focus on: EU Exports of Wine

The value of EU wine exports (HS code 2204) stood at about 6 billion before the 2008 crisis and more recently increased from EUR 6.7 billion in 2010 to EUR 9 billion in 2014 (+34%). Over the last years, there seems to be a typical monthly pattern in export values which we see every year, with lower figures in August and the Winter months, and a peak in export values in July and October (see graph below).

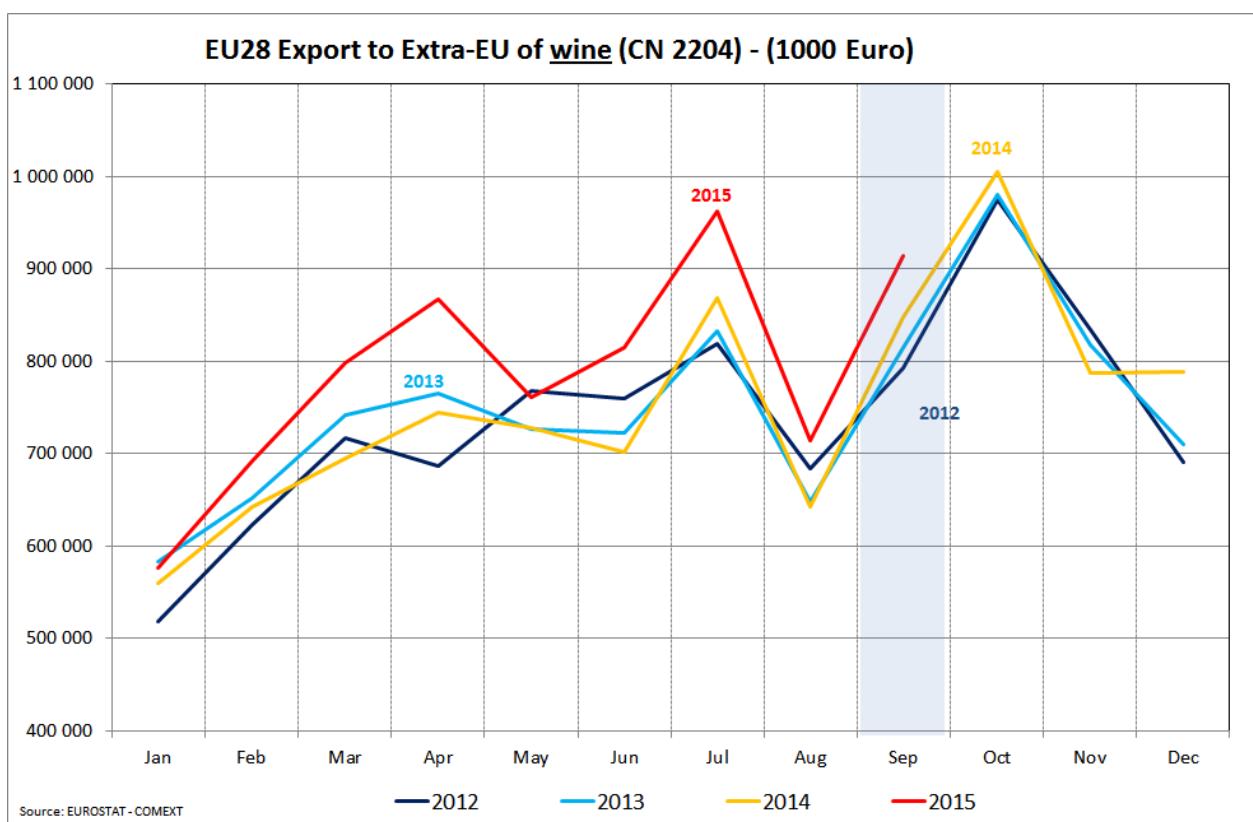
Most important export market is the US, absorbing almost 30% of all EU wine exports, followed by Switzerland (about 10%). Other important markets are Canada, Japan, China (with a strong growth rate until 2012) and Hong Kong. Wine exports to Russia went down over the past 12 months until September 2015 by 26%, although wine is not subject to the embargo.

For the years 2010 to 2014, the highest growth rates in EU wine exports to major destinations were achieved in Nigeria (EUR +31 million) and the United Arab Emirates (EUR +50 million), with export values almost doubling between 2010 and 2014. For this period, high increases were also seen in wine exports to South Korea (EUR +40 million; +85%), Australia (EUR

+73 million; +75%) and Singapore (EUR+146 million; +74%). The most important increase in absolute export values was achieved on the US market (EUR +690 million; +35%) in China (EUR +258 million; +66%) and in Norway (EUR +108 million; +53%).

While export values went up for most destinations, wine exports went down to some African and Middle East countries, traditionally less important markets for EU wine exports.

Wine represents about 7.7% of the value of all EU agri-food exports to extra-EU destinations (average for the years 2010 to 2014). The highest share is reached in **Italy**, where wine contributes 21.3% to agri-food exports to non-EU countries, followed by **Portugal** (19.6%) and **France** (19.2%). In value terms, exports of wine are slightly less important for Spain (11.4%) and much less important for the overall export portfolio of other wine producing countries such as Luxembourg (3.7%), Germany (2.6%), Bulgaria (1.8%), Austria (1.7%), Slovenia (1.5%), Hungary (1.2%) and Greece (1.0%). However, also for Latvia (15.0%) and Lithuania (6.4%) re-exports of wine are quite prominent.



**Table 1: EU28 agri-food exports – top 20 destinations**

EU28 agri-food exports to ....		cumulative data: 12 month period				monthly data			
PARTNER/PERIOD (million Euro) source: COMEXT	Rank 2014/15	Oct 2013- Sep 2014	Oct 2014- Sep 2015	Difference Oct 14-Sep 15 to Oct 13-Sep 14		Aug 2015	Sep 2015	Difference Sep 15 to Aug 15	
		mio €	mio €	mio €	%	mio €	mio €	mio €	%
Extra-EU28		120 837	128 041	7 203	6,0	9 749	10 984	1 235	12,7
United States	1	15 888	18 750	2 862	18,0	1 543	1 838	295	19,1
China	2	7 144	9 867	2 722	38,1	799	941	141	17,7
Switzerland	3	7 146	7 553	407	5,7	556	630	75	13,4
Russian Federation	4	10 414	5 915	-4 499	-43,2	430	476	46	10,7
Japan	5	5 398	5 194	-204	-3,8	410	467	57	13,8
Hong Kong	6	4 306	4 712	406	9,4	269	319	50	18,4
Saudi Arabia	7	3 646	4 445	799	21,9	307	392	85	27,8
Norway	8	3 997	4 045	48	1,2	327	365	38	11,7
Turkey	9	2 690	3 419	729	27,1	237	265	27	11,6
Algeria	10	3 532	3 377	-155	-4,4	206	264	59	28,6
Canada	11	3 114	3 347	233	7,5	256	331	75	29,4
United Arab Emirates	12	2 619	2 932	314	12,0	268	278	10	3,5
Australia	13	2 436	2 727	291	12,0	253	266	13	5,2
Korea, Republic of	14	1 996	2 515	519	26,0	159	171	11	7,2
Egypt	15	1 951	2 339	388	19,9	144	130	-14	-9,8
Singapore	16	1 934	2 007	73	3,8	174	201	26	15,1
South Africa	17	1 549	1 689	140	9,0	129	190	61	47,2
Brazil	18	1 585	1 674	89	5,6	145	141	-4	-2,5
Morocco	19	1 548	1 505	-44	-2,8	104	88	-16	-15,3
Israel	20	1 239	1 412	173	14,0	115	121	6	5,5
other countries		36 707	38 618	1 911	5,2	2 919	3 111	192	6,6

**Table 2: EU28 agri-food exports – most important changes in September 2015**

EU28 agri-food exports to ....		cumulative data: 12 month period				monthly data			
PARTNER/PERIOD (million Euro) source: COMEXT	Rank 2014/15	Oct 2013- Sep 2014	Oct 2014- Sep 2015	Difference Oct 14-Sep 15 to Oct 13-Sep 14		Aug 2015	Sep 2015	Difference Sep 15 to Aug 15	
		mio €	mio €	mio €	%	mio €	mio €	mio €	%
Extra-EU28		120 837	128 041	7 203	6,0	9 749	10 984	1 235	12,7
United States	1	15 888	18 750	2 862	18,0	1 543	1 838	295	19,1
China	2	7 144	9 867	2 722	38,1	799	941	141	17,7
Saudi Arabia	7	3 646	4 445	799	21,9	307	392	85	27,8
Canada	11	3 114	3 347	233	7,5	256	331	75	29,4
Switzerland	3	7 146	7 553	407	5,7	556	630	75	13,4
South Africa	17	1 549	1 689	140	9,0	129	190	61	47,2
Algeria	10	3 532	3 377	-155	-4,4	206	264	59	28,6
Japan	5	5 398	5 194	-204	-3,8	410	467	57	13,8
Hong Kong	6	4 306	4 712	406	9,4	269	319	50	18,4
Russian Federation	4	10 414	5 915	-4 499	-43,2	430	476	46	10,7
Dominican Republic	64	241	290	49	20,3	31	27	-5	-14,6
Belarus	31	911	982	71	7,8	49	43	-6	-12,1
Mauritania	76	188	210	22	11,4	18	11	-7	-36,5
Djibouti	112	67	71	4	5,8	11	3	-8	-71,9
Tunisia	40	562	701	139	24,7	45	36	-9	-19,7
India	39	494	707	213	43,2	70	61	-9	-13,0
Mexico	22	1 064	1 304	239	22,5	147	133	-14	-9,4
Egypt	15	1 951	2 339	388	19,9	144	130	-14	-9,8
Morocco	19	1 548	1 505	-44	-2,8	104	88	-16	-15,3
Jordan	37	619	741	121	19,6	76	55	-20	-26,8
other countries		51 055	54 344	3 289	6,4	4 150	4 549	398	9,6

**Table 3: EU28 agri-food exports by product category**

**Table 4: EU28 agri-food imports – top 20 origins**

EU28 agri-food imports from ....	cumulative data: 12 month period					monthly data			
	Rank 2014/15	Oct 2013- Sep 2014	Oct 2014- Sep 2015	Difference Oct 14-Sep 15 to Oct 13-Sep 14		Aug 2015	Sep 2015	Difference Sep 15 to Aug 15	
				mio €	mio €			mio €	mio €
Extra-EU28		102 692	110 925	8 232	8,0	8 684	9 072	388	4,5
Brazil	1	13 055	13 227	172	1,3	1 013	1 031	18	2
United States	2	10 179	11 680	1 500	14,7	779	855	76	10
Argentina	3	5 344	5 664	320	6,0	618	558	-60	-10
China	4	4 645	5 061	416	9,0	382	419	37	10
Turkey	5	3 898	4 870	972	24,9	366	441	76	21
Switzerland	6	4 393	4 547	153	3,5	351	416	65	19
Indonesia	7	4 468	4 447	-20	-0,5	352	376	25	7
Ukraine	8	4 188	3 578	-610	-14,6	341	298	-43	-13
India	9	2 759	2 919	160	5,8	243	251	8	3
Côte d'Ivoire	10	2 329	2 577	248	10,7	181	211	30	17
New Zealand	11	2 337	2 465	128	5,5	194	186	-8	-4
South Africa	12	2 103	2 430	327	15,6	247	241	-6	-3
Thailand	13	2 184	2 406	222	10,2	193	190	-2	-1
Chile	14	2 112	2 253	141	6,7	175	166	-9	-5
Canada	15	2 252	2 230	-22	-1,0	106	130	23	22
Vietnam	16	1 774	2 207	433	24,4	194	185	-8	-4
Malaysia	17	2 179	2 179	0	0,0	156	216	60	39
Colombia	18	1 610	1 960	350	21,8	175	166	-8	-5
Australia	19	1 965	1 866	-100	-5,1	122	136	14	12
Peru	20	1 580	1 794	215	13,6	170	163	-7	-4
other countries		27 339	30 565	3 226	11,8	2 328	2 436	107	5

**Table 5: EU28 agri-food imports – most important changes in September 2015**

EU28 agri-food imports from ....	cumulative data: 12 month period					monthly data			
	Rank 2014/15	Oct 2013- Sep 2014	Oct 2014- Sep 2015	Difference Oct 14-Sep 15 to Oct 13-Sep 14		Aug 2015	Sep 2015	Difference Sep 15 to Aug 15	
				mio €	mio €			mio €	mio €
Extra-EU28		102 692	110 925	8 232	8,0	8 684	9 072	388	4,5
United States	2	10 179	11 680	1 500	14,7	779	855	76	9,8
Turkey	5	3 898	4 870	972	24,9	366	441	76	20,8
Switzerland	6	4 393	4 547	153	3,5	351	416	65	18,5
Malaysia	17	2 179	2 179	0	0,0	156	216	60	38,6
China	4	4 645	5 061	416	9,0	382	419	37	9,8
Côte d'Ivoire	10	2 329	2 577	248	10,7	181	211	30	16,6
Russian Federation	24	1 598	1 314	-285	-17,8	83	112	29	35,5
Uruguay	35	598	753	155	25,9	82	110	28	34,2
Indonesia	7	4 468	4 447	-20	-0,5	352	376	25	7,0
Honduras	33	623	831	208	33,4	52	39	-13	-24,9
Nigeria	43	516	475	-42	-8,1	35	22	-13	-38,2
Belize	74	105	125	20	19,1	22	6	-16	-73,1
Guatemala	38	475	558	83	17,4	53	36	-17	-31,8
Paraguay	32	901	855	-46	-5,1	97	80	-17	-17,8
Tunisia	34	275	807	532	193,5	74	49	-25	-34,2
Ghana	25	1 271	1 279	8	0,7	123	97	-26	-21,2
Papua New Guinea	41	481	495	14	3,0	54	27	-28	-51,1
Ukraine	8	4 188	3 578	-610	-14,6	341	298	-43	-12,5
Argentina	3	5 344	5 664	320	6,0	618	558	-60	-9,8
other countries		54 226	58 652	4 426	8,2	4 484	4 644	160	3,6

**Table 6: EU28 agri-food imports by product category**

PRODUCT/PERIOD	EU 28 IMPORT						
	Oct13-Sep14	Oct14-Sep15	Difference Oct 14 - Sep 15 to Oct 13 - Sep 14		Aug-15	Sep-15	Difference Sep 15 to Aug 15
			mio €	%			
All agri-food products	102 692	110 925	8 684	8,0	8 684	9 072	388
Commodities	45 434	45 230	-205	-0,5	3 525	3 608	82
Other primary	25 583	29 966	4 383	17,1	2 282	2 323	42
Processed	12 149	13 800	1 651	13,6	1 112	1 134	22
Food preparations	5 707	6 441	734	12,9	512	567	54
Beverages	2 489	2 687	198	8,0	250	254	4
Non-edible	7 452	8 648	1 197	16,1	876	1 002	125
Wheat	1 121	1 658	537	47,9	140	153	13
Cereals, other than wheat and rice	3 176	1 896	-1 280	-40,3	148	91	-57
Rice	1 047	1 113	66	6,3	99	91	-8
Flours and other products of the milling industry	130	146	17	12,7	12	12	-2,2
Malt	2	0	-1	-74,3	0	0	0
Starches, inulin & gluten	50	58	8	16,4	4	5	1
Soyabean	5 480	4 921	-559	-10,2	366	276	-90
Oilseeds, other than soyabean	3 124	2 839	-285	-9,1	219	297	79
Palm & palm kernel oil	5 643	5 409	-234	-4,1	450	394	-57
Vegetable oils other than palm & olive oil	1 878	1 786	-92	-4,9	158	140	-18
Oilcakes	8 704	8 558	-146	-1,7	691	698	7
Other feed and feed ingredients	846	856	10	1,2	71	89	18
Beet and cane sugar	1 720	1 317	-403	-23,4	136	157	20
Sugar, other than beet & cane	462	439	-22	-4,9	33	40	7
Milk powders and whey	45	43	-3	-5,9	3	4	1
Butter	147	80	-66	-45,2	7	7	0
Gums, resins and plant extracts	798	951	153	19,1	73	77	4
Unroasted coffee, tea in bulk & mate	6 382	8 178	1 796	28,1	562	626	65
Cocoa beans	3 032	3 233	201	6,6	218	279	61
Cocoa paste and powder	1 647	1 716	68	4,2	137	157	20
Agricultural commodities, not specified	0	32	32	0	0	16	16
Live animals	200	263	63	31,8	12	27	16
Bovine meat, fresh, chilled and frozen	1 568	1 778	210	13,4	147	140	-7
Pork meat, fresh, chilled and frozen	38	37	-1	-2,8	3	3	0
Poultry meat, fresh, chilled and frozen	318	320	3	0,9	30	30	-1
Sheep and goat meat, fresh, chilled and frozen	992	1 062	71	7,1	68	65	-3
Offal, animal fat & other meats, fresh, chilled & frozen	1 154	1 132	-22	-1,9	95	95	0
Fresh milk and cream, buttermilk and yoghurt	31	28	-4	-12,4	2	2	1
Eggs and honey	409	544	135	32,9	51	52	1
Vegetables, fresh, chilled and dried	3 817	4 166	349	9,1	226	239	12
Fruit, fresh or dried, excl. citrus & tropical fruit	5 156	5 755	598	11,6	298	323	25
Citrus fruit	1 470	1 691	221	15,0	283	246	-37
Tropical fruit, fresh or dried, nuts and spices	9 910	12 554	2 644	26,7	1 026	1 056	30
Miscellaneous seeds and hop cones	499	635	137	27,4	40	45	5
Agricultural primary products, not specified	21	1	-20	-96,6	0	0	0
Meat preparations	2 129	2 265	136	6,4	168	175	8
Cheese	481	431	-50	-10,3	30	37	6
Olive oil	139	681	542	389,9	70	46	-24
Preparations of vegetables, fruit or nuts	2 939	3 727	788	26,8	308	335	27
Fruit juices	2 445	2 414	-31	-1,3	190	182	-8
Wine, cider and vinegar	2 469	2 692	223	9,0	228	215	-13
Roasted coffee and tea	1 546	1 590	43	2,8	118	144	26
Chocolate, confectionery and ice cream	902	1 125	223	24,7	99	118	19
Infant food & other prep of cereals, flour, starch or milk	327	373	46	14,2	34	37	3
Pasta, pastry, biscuits and bread	1 029	1 178	148	14,4	95	96	2
Soups and sauces	609	644	35	5,8	50	51	1
Coffee and tea extracts	439	519	79	18,0	38	45	7
Food preparations, not specified	1 551	1 613	62	4,0	124	134	10
Pet food	850	990	140	16,5	73	85	12
Waters and soft drinks	862	910	47	5,5	85	80	-5
Beer	235	284	49	20,7	24	22	-2
Spirits, liqueurs and vermouth	1 384	1 485	101	7,3	141	152	11
Odoriferous substances	8	9	1	16,4	1	0	0
Raw hides, skins and furskins	851	779	-72	-8,5	27	63	36
Non edible animal products	363	356	-6	-1,8	24	27	3
Wool and silk	821	815	-6	-0,7	37	72	35
Cotton, flax and hemp, and plaiting materials	600	578	-22	-3,7	41	48	7
Cut flowers and plants	1 223	1 326	103	8,4	96	100	4
Bulbs, roots and live plants	743	808	65	8,8	61	63	2
Raw tobacco	2 360	2 665	305	12,9	185	220	36
Cigars and cigarettes	252	235	-17	-6,8	21	22	1
Fatty acids and waxes	1 718	1 467	-251	-14,6	124	117	-6
Sugar alcohols	12	14	2	18,6	2	1	0
Essential oils	658	834	176	26,7	68	88	20
Ethanol	365	257	-108	-29,6	23	19	-4
Casein, other albuminoidal sub. & mod. starches	806	836	29	3,6	63	63	-1
Non-edible, not specified	11	37	26	240,9	1	1	0
Products non-attributable	547	1 794	1 248	228,1	230	280	50