



European
Commission



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS IN NOVEMBER 2022
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<https://ec.europa.eu/info/food-farming-fisheries/trade/trade-and-international-policy-analysis>

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Next issue will be published on 20/03/2023

Note to the reader

The latest available consolidated trade data at EU level cover market developments until November 2022. 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).

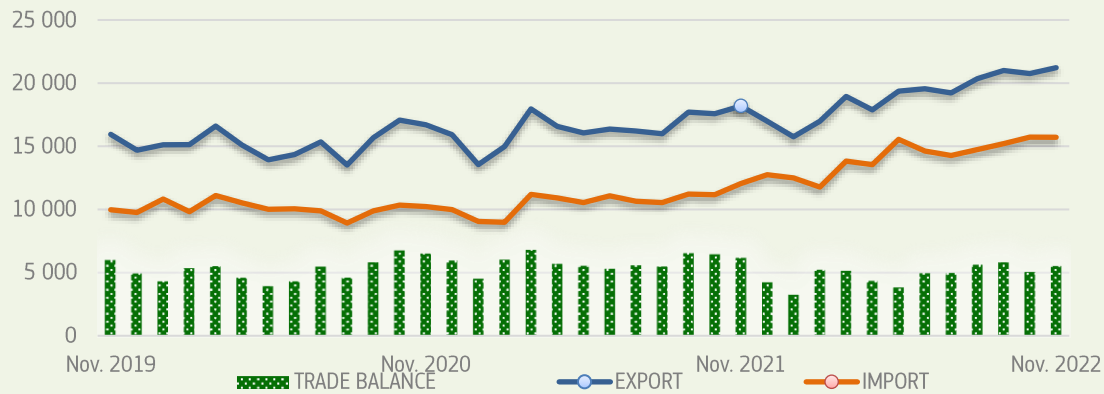
HIGHLIGHTS: NEW RECORD VALUE OF EU AGRI-FOOD TRADE IN NOVEMBER 2022

EU agri-food trade (exports + imports) reached again a record value in November 2022, at EUR 36.9 billion. EU agri-food trade since the beginning of the year 2022 reached a total of EUR 369 billion, +23% compared to the 2021 January-November period.

This is mainly due to an increase in value of imports over the year, which increased by 34%. The value of EU agri-food exports also increased, but to a lesser extent (+17%). As a result, the overall trade surplus for agri-food products receded compared to previous years (by 16%). the EU trade balance for agri-food products reached EUR 53.5 billion in 2022 (January-November).

Compared to October 2022, EU **imports** of agriculture and food products did not change significantly, at EUR 15.7 billion. EU agri-food **exports** slightly increased compared to the previous month, to reach **EUR 21.2 billion**, a 2% increase.

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



Source: Comext



EU AGRI-FOOD EXPORTS

EU EXPORTS INCREASED TO ALMOST ALL PARTNERS IN JAN-NOV PERIOD 2022

EU agri-food exports reached **EUR 211 billion** from January to November 2022. The United Kingdom and the United States are the two most important destinations for EU agri-food exports. Exports to the UK increased by 21% and those to the US by 13%, respectively. These increases represent additional exports of EUR 5.6 billion and EUR 4.4 billion, respectively.

Among the other most significant destinations, only EU exports to China and Russia declined. For **China**, this is largely due to lower exports of pigmeat over the period, both in quantity (-42%) and value terms (-39%). Still, the unit value has been slightly higher compared to 2021 period (+6%). EU exports of cereals have been also down (-45% in value, -61% in volumes). The third biggest decline has been for vegetable oils (-89% in value, -93% in volumes).

EU exports to **Russia** declined mostly for horticulture (-EUR 138 million), cereals preparations and milling products (-EUR 119 million) and for pet food and forage crops (-EUR 79 million). Cereals and oilseeds also decreased in volume terms compared to 2021, by -28% and -82% respectively. Regarding animal products, EU exports also declined both in quantity and value terms for all products, except for sheep and goat (which represent a marginal share).

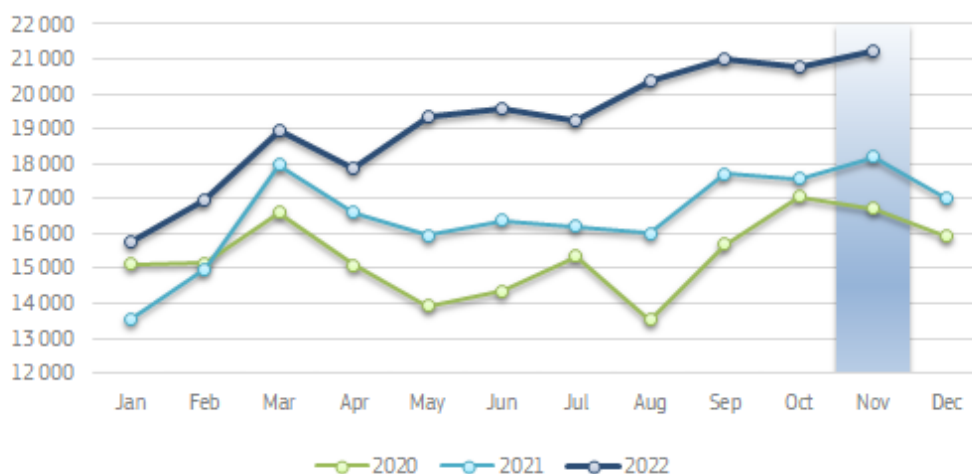
THE UNIT VALUE OF ALL AGRI-FOOD EXPORTS INCREASED IN 2022

EU exports of agri-food products increased across the board of most product groups. The unit value of all agri-food products increased in January–November 2022 compared to the same period in 2021.

The EU increased its **wheat** exports from January to November 2022 by 7% in value terms compared to 2021, reaching 29.4 million tonnes. This increase represented a value of EUR 4.3 billion. The EU also exported more **cereals preparations and milling products** (+3%). The value of exports rose by EUR 3.3 billion. Increases in value terms were also driven by the rise of commodity prices on the global market.

For **animal products**, the EU has decreased its exports overall. **Pig meat** exports declined by 15% in the period, while export volumes of **poultry, bovine meat** as well as **dairy products** decreased approximately by 10% each. Nevertheless, in value terms, all sectors but pig meat increased. In total, the animal sector generated EUR 13 billion of exports in the period January–November 2022.

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



EU AGRI-FOOD IMPORTS

BRAZIL, THE UK AND UKRAINE AS THE MAIN SOURCES OF EU IMPORTS IN 2022

Over the period, EU imports increased by 34%, to reach EUR 157 billion. Major part of the increase is due to increased imports from the two main EU partners, Brazil and the UK as well as from Ukraine.

EU imports from **Brazil** reached EUR 18 billion in January-November 2022 (+51% compared to 2021). While imports of cereals and poultry increased significantly in quantities, the increase in value has been mainly due to the price increase on the global markets. The unit value of fruit and nuts imports increased by 14% (while quantities imported declined), as well as the unit value of coffee, tea, cocoa and spices (+86%).

EU imports from **the UK** increased by 27%, to reach EUR 8.6 billion. Biggest value increases were recorded for wheat (+EUR 206 million), other coarse grains (+EUR 196 million) and for bovine meat (+EUR 162 million).

Imports from **Ukraine** started to increase in May and attained EUR 11.5 billion for the period January-November 2022. The increase in EU imports has been mainly for cereals (wheat: +EUR 653 million, maize: +EUR 1.6 billion) and oilseeds (sunflower seeds: +EUR 1 billion, sunflower oil: +EUR 895 million and rapeseed: +EUR 318 million). These increases correspond to higher quantities imported.

MOST OF THE INCREASE OF EU IMPORTS HAS BEEN FOR PRIMARY COMMODITIES

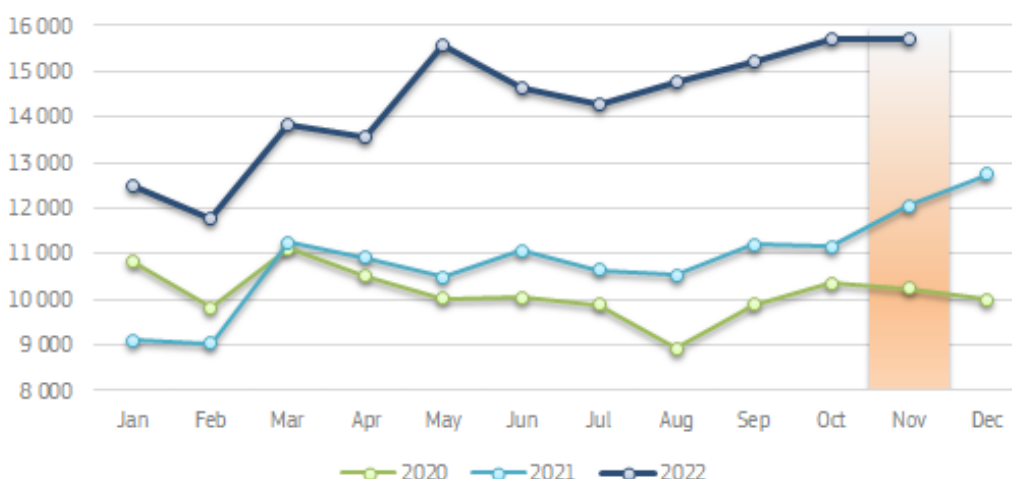
EU imports in January to November 2022 increased by 34% which represent an **additional EUR 40 billion**. Except for a limited number of commodities, the price of the immense majority of agri-food products increased.

On top of this list of commodities for which prices have increased were **palm kernel oil** (+69% of the import unit value), **butter** (+55%) and **horticulture** products (+52%). Import quantities for butter increased, but not the other two commodities.

Biggest increases over the year 2022 were recorded for imports of **primary commodities**, such as maize (+EUR 3.6 billion, corresponding to +9 million tonnes), soya cake (+EUR 2 billion, +737 thousand t), and rapeseed (+EUR 1.8 billion, +1.3 million t). For soya beans, imports increased in value (+EUR 1.6 billion) but receded in quantity terms (-371 million t).

	% Evolution in quantity	%Evolution in value	%evolution in unit value
Maize	76%	133%	32%
Soya cake	5%	34%	27%
Rapeseed	30%	79%	38%
Soya seeds	-3%	27%	31%

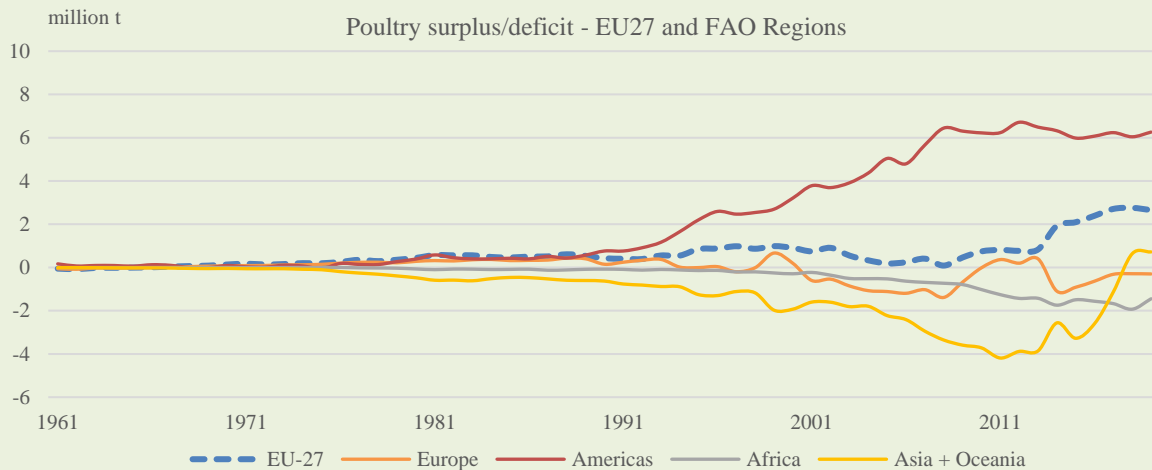
EU imports of agri-food products from extra-EU (million EUR)



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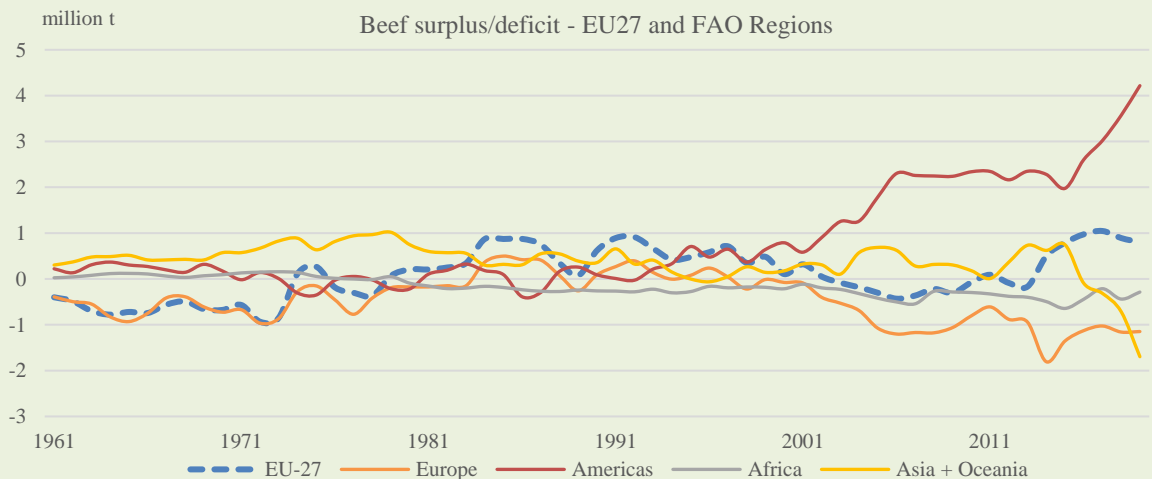
Poultry and beef surplus and deficit across world regions (1961 – 2019)

Over the long term, the global meat market has been steadily growing alongside the world's population with a noticeable and steady increase in poultry (as well as pork) consumption in all regions, contrary to beef consumption. This overview presents some historical evolutions in production gaps or surplus vis-à-vis domestic consumption across FAO regions namely Europe and Central Asia¹, Africa, Asia-Oceania and the Americas.



Disclaimer: This is data and methodology from FAOSTAT. EU-27 data of the European Commission can be found on the Europa website²

Poultry production in the Americas increased faster than consumption leading to a steady increase in surplus. After a steady increase in the deficit in production to meet the rising demand (led by China), the Asia and Oceania region has managed to change the trend and became net exporter in the last two years of the period.



Disclaimer: This is data and methodology from FAOSTAT. EU-27 data of the European Commission can be found on the Europa website²

As regards beef, the Americas show a gradual increase in production and a stable consumption leading to a consistent increase of surplus since the early 2000s particularly driven by Brazil. Starting from 2015, the Americas and the Asia + Oceania region have experienced diverging trends. The development in Asia + Oceania has been driven by an increase in consumption in China and a reduction in production in Australia. In the EU-27, the surplus decreased in the 80s and 90s and the EU became a net importer in the 2000s. Starting from 2014, production has increased slightly, faster than the consumption and reached a plateau in 2018.

1. FAO Europe region includes 54 countries from continental Europe, including Russia and the Balkan peninsula.

2. https://agridata.ec.europa.eu/extensions/DataPortal/agricultural_markets.html

TABLE 1

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Nov21	Jan22-Nov22	Difference	
TOTAL AGRIFOOD	184 462	198 141	100%	181 164	211 033	29 869	16%
United Kingdom	41 962	41 946	21%	38 429	44 063	5 634	15%
United States	21 447	24 518	12%	22 428	26 856	4 428	20%
Morocco	2 165	2 368	1%	2 082	3 667	1 585	76%
Switzerland	9 030	9 858	5%	8 998	10 275	1 277	14%
Saudi Arabia	4 305	3 631	2%	3 298	4 357	1 059	32%
Cambodia	252	419	0%	403	267	- 136	-34%
Ukraine	2 841	3 109	2%	2 803	2 664	- 138	-5%
Russian Federation	6 840	7 341	4%	6 716	6 477	- 239	-4%
Hong Kong	2 540	2 159	1%	1 996	1 682	- 314	-16%
China	17 684	17 148	9%	15 991	14 285	-1 706	-11%
Other countries	75 396	85 643	43%	78 021	96 440	18 419	24%

TABLE 2

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Nov21	Jan22-Nov22	Difference	
TOTAL AGRIFOOD	184 462	198 141	100%	181 164	211 033	29 869	16%
United Kingdom	41 962	41 946	21%	38 429	44 063	5 634	15%
United States	21 447	24 518	12%	22 428	26 856	4 428	20%
China	17 684	17 148	9%	15 991	14 285	- 1 706	-11%
Switzerland	9 030	9 858	5%	8 998	10 275	1 277	14%
Japan	6 984	7 378	4%	6 773	7 586	813	12%
Russian Federation	6 840	7 341	4%	6 716	6 477	- 239	-4%
Norway	4 844	5 412	3%	4 994	5 479	485	10%
Canada	3 637	4 049	2%	3 722	4 411	689	19%
Saudi Arabia	4 305	3 631	2%	3 298	4 357	1 059	32%
Korea, Republic of	3 029	3 940	2%	3 575	4 244	669	19%
Türkiye	3 061	3 569	2%	3 226	3 702	475	15%
Morocco	2 165	2 368	1%	2 082	3 667	1 585	76%
Australia	3 188	3 302	2%	3 009	3 531	522	17%
Algeria	2 989	2 948	1%	2 778	3 413	634	23%
United Arab Emirates	2 122	2 346	1%	2 099	2 979	880	42%
Other countries	51 176	58 386	29%	53 047	65 709	12 663	24%

TABLE 3

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2020	2021	Share 2021	Jan21-Nov21	Jan22-Nov22		
TOTAL AGRIFOOD	184 462	198 141	100%	181 164	211 033	29 869	16%
Cereals	11 413	11 993	6%	10 930	15 594	4 664	43%
Cereal preparations and milling products	18 777	18 814	9%	17 194	20 918	3 724	22%
Dairy products	15 988	16 990	9%	15 528	18 797	3 269	21%
Mixed food preparations and ingredients	11 208	12 263	6%	11 141	13 593	2 452	22%
Preparations of fruit, nuts and vegetables	8 059	8 415	4%	7 665	9 542	1 877	24%
Fruit and nuts	6 029	5 712	3%	5 145	5 444	299	6%
Sheep and goat	617	578	0%	541	642	101	19%
Sugar and isoglucose	556	596	0%	508	560	51	10%
Horticulture	3 868	4 643	2%	4 305	4 162	- 142	-3%
Pigmeat	15 110	14 527	7%	13 439	12 663	- 776	-6%
Other products	92 837	103 610	52%	94 768	109 118	14 350	15%

TABLE 4

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2020	2021	Share 2021	Jan21-Nov21	Jan22-Nov22		
TOTAL AGRIFOOD	184 462	198 141	100%	181 164	211 033	29 869	16%
Cereal preparations and milling products	18 777	18 814	9%	17 194	20 918	3 724	22%
Dairy products	15 988	16 990	9%	15 528	18 797	3 269	21%
Wine and wine based products	13 452	16 641	8%	15 325	16 887	1 562	10%
Cereals	11 413	11 993	6%	10 930	15 594	4 664	43%
Mixed food preparations and ingredients	11 208	12 263	6%	11 141	13 593	2 452	22%
Pigmeat	15 110	14 527	7%	13 439	12 663	- 776	-6%
Beer, cider and other beverages	9 712	10 002	5%	9 197	10 058	861	9%
Preparations of fruit, nuts and vegetables	8 059	8 415	4%	7 665	9 542	1 877	24%
Confectionery and chocolate	7 885	8 885	4%	8 103	9 425	1 321	16%
Spirits and liqueurs	6 820	8 413	4%	7 775	9 137	1 362	18%
Pet food and forage crops	6 505	7 361	4%	6 724	7 863	1 140	17%
Other animal products	6 509	7 531	4%	6 903	7 527	625	9%
Vegetables	7 361	7 408	4%	6 647	7 392	745	11%
Coffee, tea, cocoa and spices	5 934	6 180	3%	5 658	6 801	1 144	20%
Tobacco, cigars and cigarettes	5 606	5 504	3%	5 118	5 604	486	10%
Other products	34 123	37 214	19%	33 819	39 232	5 413	16%

TABLE 5

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Nov21	Jan22-Nov22	Difference	
TOTAL AGRIFOOD	121 600	130 121	100%	117 368	157 505	40 137	34%
Brazil	11 362	13 548	10%	12 375	18 674	6 300	51%
Ukraine	5 837	6 927	5%	6 050	11 507	5 458	90%
China	5 128	6 109	5%	5 441	9 044	3 603	66%
United Kingdom	15 685	11 874	9%	10 704	13 904	3 200	30%
United States	9 587	9 254	7%	8 205	11 195	2 989	36%
Syrian Arab Republic	47	52	0%	47	38	- 9	-18%
Panama	285	191	0%	175	162	- 12	-7%
Iran, Islamic Republic of	355	400	0%	358	335	- 23	-7%
Ghana	1 240	1 337	1%	1 231	1 157	- 74	-6%
Nigeria	477	650	0%	617	527	- 89	-15%
Other countries	71 597	79 779	61%	72 166	90 962	18 795	26%

TABLE 6

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Nov21	Jan22-Nov22	Difference	
TOTAL AGRIFOOD	121 600	130 121	100%	117 368	157 505	40 137	34%
Brazil	11 362	13 548	10%	12 375	18 674	6 300	51%
United Kingdom	15 685	11 874	9%	10 704	13 904	3 200	30%
Ukraine	5 837	6 927	5%	6 050	11 507	5 458	90%
United States	9 587	9 254	7%	8 205	11 195	2 989	36%
China	5 128	6 109	5%	5 441	9 044	3 603	66%
Argentina	4 378	5 171	4%	4 730	6 351	1 621	34%
Indonesia	4 334	5 649	4%	5 107	6 181	1 074	21%
Türkiye	4 652	5 033	4%	4 550	5 091	541	12%
Switzerland	4 596	4 523	3%	4 114	4 429	315	8%
Australia	1 155	1 901	1%	1 683	3 533	1 850	110%
India	2 364	2 921	2%	2 682	3 443	762	28%
Côte d'Ivoire	3 302	3 259	3%	3 033	3 265	232	8%
Viet Nam	2 168	2 222	2%	2 008	3 216	1 209	60%
Malaysia	2 249	2 656	2%	2 331	3 126	795	34%
Peru	2 425	2 711	2%	2 403	3 058	655	27%
Other countries	42 377	46 363	36%	41 953	51 487	9 535	23%

TABLE 7

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Nov21	Jan22-Nov22	Difference	
TOTAL AGRIFOOD	121 600	130 121	100%	117 368	157 505	40 137	34%
Oilseeds and protein crops	15 115	18 250	14%	16 320	23 511	7 191	44%
Cereals	5 771	6 188	5%	5 379	11 258	5 879	109%
Coffee, tea, cocoa and spices	15 944	16 946	13%	15 409	20 349	4 940	32%
Non-edible for technical use	5 841	7 489	6%	6 656	11 003	4 347	65%
Vegetable oils (oilseeds and palm)	6 713	8 238	6%	7 370	10 066	2 695	37%
Beer, cider and other beverages	1 943	2 015	2%	1 860	2 148	288	15%
Wine and wine based products	1 775	1 664	1%	1 506	1 707	201	13%
Horticulture	1 688	1 928	1%	1 768	1 948	180	10%
Olives and olive oil	751	636	0%	541	647	106	20%
Pigmeat	415	293	0%	265	339	74	28%
Other products	65 644	66 473	51%	60 294	74 530	14 236	24%

TABLE 8

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Nov21	Jan22-Nov22	Difference	
TOTAL AGRIFOOD	121 600	130 121	100%	117 368	157 505	40 137	34%
Oilseeds and protein crops	15 115	18 250	14%	16 320	23 511	7 191	44%
Fruit and nuts	21 051	20 720	16%	18 980	20 508	1 528	8%
Coffee, tea, cocoa and spices	15 944	16 946	13%	15 409	20 349	4 940	32%
Cereals	5 771	6 188	5%	5 379	11 258	5 879	109%
Non-edible for technical use	5 841	7 489	6%	6 656	11 003	4 347	65%
Vegetable oils (oilseeds and palm)	6 713	8 238	6%	7 370	10 066	2 695	37%
Mixed food preparations and ingredients	5 182	5 590	4%	5 089	6 229	1 140	22%
Preparations of fruit, nuts and vegetables	5 412	5 419	4%	4 953	5 954	1 000	20%
Other animal products	4 660	4 668	4%	4 188	5 586	1 399	33%
Margarine and other oils and fats (vegetable)	3 023	3 931	3%	3 518	4 783	1 265	36%
Vegetables	4 146	4 283	3%	3 820	4 612	792	21%
Cereal preparations and milling products	3 759	3 856	3%	3 481	4 475	994	29%
Spirits and liqueurs	3 060	3 301	3%	2 944	4 038	1 094	37%
Tobacco, cigars and cigarettes	2 468	2 306	2%	2 110	3 295	1 185	56%
Pet food and forage crops	2 705	2 761	2%	2 490	3 250	760	31%
Other products	16 751	16 175	12%	14 660	18 589	3 929	27%

TABLE 9

AGRI-FOOD TRADE BALANCE (MILLION EUR)

TRADE BALANCE			
PRODUCT/PERIOD	Exports Jan22- Nov22	Imports Jan22- Nov22	Trade balance Jan22-Nov22
	million EUR		
TOTAL AGRIFOOD	211 033	157 505	53 528
Beef and veal	3 957	2 412	1 545
Pigmeat	12 663	339	12 324
Poultry and eggs	5 411	2 117	3 294
Sheep and goat	642	1 203	- 560
Dairy products	18 797	2 326	16 471
Other animal products	7 527	5 586	1 941
Cereals	15 594	11 258	4 336
Cereal preparations and milling products	20 918	4 475	16 443
Oilseeds and protein crops	2 294	23 511	-21 217
Vegetable oils (oilseeds and palm)	3 682	10 066	-6 384
Margarine and other oils and fats (vegetable)	2 146	4 783	-2 637
Sugar and isoglucose	560	1 087	- 527
Vegetables	7 392	4 612	2 780
Fruit and nuts	5 444	20 508	-15 064
Preparations of fruit, nuts and vegetables	9 542	5 954	3 588
Olives and olive oil	4 653	647	4 006
Wine and wine based products	16 887	1 707	15 180
Spirits and liqueurs	9 137	4 038	5 099
Beer, cider and other beverages	10 058	2 148	7 911
Confectionery and chocolate	9 425	2 513	6 911
Mixed food preparations and ingredients	13 593	6 229	7 364
Coffee, tea, cocoa and spices	6 801	20 349	-13 547
Pet food and forage crops	7 863	3 250	4 614
Tobacco, cigars and cigarettes	5 604	3 295	2 309
Horticulture	4 162	1 948	2 214
Non-edible for technical use	4 354	11 003	-6 649
Unspecified	1 926	142	1 784
<i>Fish and fish products</i>	6 960	29 299	-22 339
TOTAL AGRIFOOD AND FISH	217 993	186 804	31 190



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