



European
Commission



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS IN MARCH 2022

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CONTENTS

HIGHLIGHTS

EU AGRI-FOOD EXPORTS

EU AGRI-FOOD IMPORTS

TABLES

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Note to the reader

The latest available consolidated trade data at EU level cover market developments until March 2022. In order to grasp the impact of the Russian aggression on Ukraine, March 2022 figures are compared month-to-month (compared to February 2022), year-to-year (compared to March 2021). When relevant the cumulative trade for Q1 is used.

The trade figures are expressed in values, except when specifically mentioned. The unit value is the average price of trade in the period concerned (trade value at the border divided by quantity registered).

HIGHLIGHTS: LEAP OF EU TRADE IN MARCH. BOTH EXPORT AND IMPORT ON THE RISE.

EU agri-food trade (exports plus imports) reached a value of **€32.6 billion** (+12% compared to March 2021). This is due to an increasing trend of EU import values for the past year, and a steep increase in EU export values in February and March 2022. Compared to February 2022, EU trade flows increased by 13% in March.

EU exported **€18.9 billion** agricultural products in March 2022, while EU imports reached **€13.7 billion**. In the context of high global prices, they respectively increased by 11% and 16% compared to February trade values. In March 2022, the EU trade balance reached **€5.3 billion**, a similar level as in February.

EU27 trade of agri-food products (million EUR)



Source: Comext



EU AGRI-FOOD EXPORTS

INCREASE OF EU EXPORTS TOWARDS MAIN PARTNERS, EXCEPT TO RUSSIA AND TURKEY

EU agri-food exports increased by 11% in March 2022, compared to February 2022. Exports to EU top 10 country partners increased, except to Russia (-27%) and Turkey (-5%).

EU exports to **Russia** dropped by 27% compared to February and by 28% compared to March 2021. Almost all export categories decreased. Biggest decline year-to-year in absolute terms was for horticulture and pet food & forage crops. Only the exports of sheep and goat and vegetables increased year-to-year.

Trade developments in Q1-2022

Looking at cumulative monthly trade in 2022 (Q1-2022), EU exports the United Kingdom, the US and Japan increased the most compared to the same period last year.

EU exports to **the UK** increased by 22% in Q1-2022, compared to low levels in Q1-2021. This was led by a sharp increase in tobacco, cigars and cigarettes (+191%), as well as lactose (+174%) and butter (+112%). This was also driven by an increase in export quantities.

Regarding export flows to **the U.S.**, the EU increased significantly its export of vegetable oils (+205% compared to Q1-2021), cereals (+179%) and poultry and eggs (+98%), also driven by increase in volumes. On the contrary, while export values for

wine and wine-based products increased in Q1-2022 to the U.S., the actual volumes shipped decreased (-3% compared to Q1-2021).

INCREASE IN EU EXPORTS LED BY CEREALS COMPARED TO FEBRUARY

EU **cereals** export value increased by 37% compared to February 2022. The rise was led by an increase in prices but also in the quantity exported as of maize and other coarse grains (+76% and +94% month-to-month, respectively). Wheat export value also increased (+22%, driven by the peak in export price early March following the Russian invasion. Prices remain high since then). **Cereal preparations and milling products** exports also increased by 12% in March.

On the contrary, **sunflower seeds** and **rapeseed** exports dropped by 55% and 27% respectively (in quantity) in view of the uncertainty brought by the war in Ukraine. EU exports of **sunflower oil** increased by 5% in value terms, while exported quantities remain at the similar high level of February.

Regarding the livestock sector, export values increased in all sectors. **Poultry and eggs** exports increased by 19% month-to-month (also on the rise compared to March 2021). **Pigmeat** monthly export values remain relatively stable since August 2021. Exports of **dairy products** also increased by 14% in March compared to February. (+8% compared to March 2021).

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



EU AGRI-FOOD IMPORTS

EU IMPORTS VALUE UP BY 16% in MARCH 2022 MONTH-TO-MONTH

Looking at the monthly development in March 2022, EU imports from its top 10 partner countries increased month-to-month, except from Ukraine and the U.S (see the focus section for information on Ukraine). Regarding **the U.S**, the drop in import value is mainly coming from a decrease of quantities imported of soya beans and meal. Brazil (for beans and meals) and Argentina (meals) origins were largely more competitive. While import unit value dropped by 15% (Brazil origin) in March, unit value of soya beans from the US increased by 6%.

Trade developments in Q1-2022

Looking at the period Jan-Mar 2022 (Q1), EU imports from Brazil, the United Kingdom and Ukraine increased the most year-to-year. Import values increased respectively by 56%, 51% and 65%.

Cumulative monthly imports from **Brazil** reached €3.7 billion in Q1-2022, led by oilseeds and protein crops (€1.6 billion) and coffee, tea, coca and spices (€1.1 billion). Maize imports also rose to partially compensate the loss imports from Ukraine sources in March.

EU imported from the **United Kingdom** mainly spirits and liqueurs in Q1-2022, representing 15% of the total import bill of the EU to the UK (the UK

represents 58% of EU spirits and liqueurs imports in this period). Cereals preparations & milling products and dairy products continue to represent 10% each of the total EU import value from the UK.

HIGHEST IMPORT INCREASE FOR FRUIT AND NUTS IN MARCH 2022

In March 2022, EU monthly import bill increased mostly due to an increase in **coffee** (+20%), **soya meal** (32%) and **rapeseed** (+65%). These values are also significantly higher than a year ago in March 2021. In the case of rapeseed, the increase was only driven by a price effect. In the case of coffee and soya meal, imported quantities also increased compared to last year in the same period.

Apples and pears imports also increased substantially (+226% in value). It is still 20% lower than the import value in March 2021. But, in terms of quantity imported, volumes were higher than March 2021, showing a drop in import price compared to last year of about 24%. Chile and Argentina origins dropped at the benefit of South Africa and North Macedonia.

EU imports of cereals, notably **maize, sunflower oil** as well as **raw sugar** decreased in March compared to February. This materialized with a drop in the quantities imported month-to-month.

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



FOCUS

IMPACT OF THE WAR IN UKRAINE FOR AGRI-FOOD TRADE in March 2022

Ukraine has fertile soils and the agricultural sector produces agricultural and food commodities not only to feed its own population and its neighbours but also to many countries worldwide. Ukraine contributes to 12% of the global wheat trade, 15% of the maize and 50% of sunflower oil trade. **Agri-food trade flows with Ukraine** are therefore of **crucial importance** for the stability of the markets and, more importantly, the access to food for a huge number of people around the world.

In 2021, the **EU imported** €6.9 billion of agri-food products. **Sunflower oil** represented the highest import value for the EU (24% of total EU imports from Ukraine), followed closely by **maize** (24%) and **rapeseed** (+15%). In quantity terms, Ukraine share in EU imports reached 87%, 53% and 35% respectively. In March 2022, EU imports of these three commodities dropped by 10% (sunflower oil), 37% (maize) and 29% (rapeseed), compared to the same period a year ago. Concerning wheat, the quantity imported in the EU declined by 77% compared to March 2021.

EU food exports to Ukraine in 2021 were dominated by **cheese** (7% of EU total exports to Ukraine), **mixed food preparations** (6%), **cereals preparations** (6%) and **chocolate** (6%). In March 2022, EU export logistic chains were disrupted and the quantities exported to Ukraine dropped compared to March 2021. Volumes of cheese decreased by 85%, mixed food preparations by 61% and cereals preparations by 11%.

In March 2022, the **EU** increased its **exports** towards **North Africa** by 16% compared to March 2021. This mostly concerned oilseeds and protein crops towards Algeria and cereals (to all countries) (price driven) but also beef and veal (to Libya and Egypt), margarine & other vegetable oils, sugar & isoglucose, sheep & goat and vegetables (mainly quantity driven). EU exports of food commodities to **sub-Saharan Africa** increased in March 2022, compared to March 2021. In volume terms, the EU raised their exports of rice, maize, white sugar, pigmeat and sheep & goat while the unit import price of these commodities dropped year-to-year.

Ukraine total exports of **wheat** and wheat products dropped significantly in March (data consulted in June 16th), when the Russian aggression hit the country and the logistics of trade routes. More particularly, exports to main partners: Egypt by 26% (year-to-year), exports to Yemen fell by 55% and even no trade was recorded for wheat to Lebanon, Libya nor Nigeria. Similarly, **maize** exports fell drastically in March compared to the level of the same month of 2021. The biggest decline in exported volumes were recorded for China, Egypt and Iran. The drop reached respectively 63%, 94% and -74%. For **sunflower oil**, India, China, Iran and the UAE was hit the most by the reduction of Ukraine exports in March. Ukraine's exports to India dropped by 66% compared to March 2021. Reduction of exports to China reached 80% and no trade at all was recorded in March to Iran and the UAE.

TABLE 1

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Mar21	Jan22-Mar22	Difference	
TOTAL AGRIFOOD	184 467	198 064	100%	46 499	51 693	5 195	11%
United Kingdom	41 960	41 931	21%	9 091	11 099	2 008	22%
United States	21 447	24 507	12%	5 311	6 348	1 037	20%
Japan	6 984	7 384	4%	1 611	2 037	426	26%
Switzerland	9 030	9 844	5%	2 455	2 790	335	14%
Egypt	1 694	2 181	1%	424	755	331	78%
Libya	868	932	0%	301	233	- 67	-22%
Saudi Arabia	4 305	3 630	2%	1 008	910	- 98	-10%
Hong Kong	2 541	2 157	1%	534	396	- 138	-26%
Ukraine	2 841	3 107	2%	786	616	- 171	-22%
China	17 684	17 137	9%	4 786	3 365	-1 420	-30%
Other countries	75 112	85 253	43%	20 192	23 145	2 953	15%

TABLE 2

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Mar21	Jan22-Mar22	Difference	
TOTAL AGRIFOOD	184 467	198 064	100%	46 499	51 693	5 195	11%
United Kingdom	41 960	41 931	21%	9 091	11 099	2 008	22%
United States	21 447	24 507	12%	5 311	6 348	1 037	20%
China	17 684	17 137	9%	4 786	3 365	- 1 420	-30%
Switzerland	9 030	9 844	5%	2 455	2 790	335	14%
Japan	6 984	7 384	4%	1 611	2 037	426	26%
Russian Federation	6 841	7 356	4%	1 852	1 836	- 15	-1%
Norway	4 844	5 406	3%	1 294	1 384	90	7%
Korea, Republic of	3 029	3 940	2%	817	1 131	315	39%
Canada	3 637	4 049	2%	857	1 052	194	23%
Turkey	3 061	3 562	2%	916	1 024	108	12%
Morocco	2 165	2 366	1%	748	915	167	22%
Saudi Arabia	4 305	3 630	2%	1 008	910	- 98	-10%
Australia	3 188	3 299	2%	742	872	129	17%
Israel	2 141	2 648	1%	577	783	206	36%
Egypt	1 694	2 181	1%	424	755	331	78%
Other countries	52 456	58 824	30%	14 009	15 393	1 384	10%

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-Mar21	Jan22-Mar22		
TOTAL AGRIFOOD	184 467	198 064	100%	46 499	51 693	5 195	11%
Cereals	11 414	11 997	6%	3 064	3 719	655	21%
Cereal preparations and milling products	18 779	18 805	9%	4 376	5 027	651	15%
Wine and wine based products	13 452	16 626	8%	3 270	3 870	601	18%
Dairy products	15 988	17 012	9%	3 851	4 391	541	14%
Mixed food preparations and ingredients	11 208	12 265	6%	2 888	3 420	531	18%
Sugar and isoglucose	556	596	0%	136	162	26	19%
Fruit and nuts	6 026	5 713	3%	1 437	1 462	25	2%
Sheep and goat	617	575	0%	152	175	23	15%
Horticulture	3 867	4 631	2%	1 333	1 323	- 10	-1%
Pigmeat	15 111	14 524	7%	4 066	3 153	- 913	-22%
Other products	87 449	95 321	48%	21 927	24 991	3 065	14%

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-Mar21	Jan22-Mar22		
TOTAL AGRIFOOD	184 467	198 064	100%	46 499	51 693	5 195	11%
Cereal preparations and milling products	18 779	18 805	9%	4 376	5 027	651	15%
Dairy products	15 988	17 012	9%	3 851	4 391	541	14%
Wine and wine based products	13 452	16 626	8%	3 270	3 870	601	18%
Cereals	11 414	11 997	6%	3 064	3 719	655	21%
Mixed food preparations and ingredients	11 208	12 265	6%	2 888	3 420	531	18%
Pigmeat	15 111	14 524	7%	4 066	3 153	- 913	-22%
Beer, cider and other beverages	9 713	10 012	5%	2 247	2 535	288	13%
Preparations of fruit, nuts and vegetables	8 061	8 409	4%	1 924	2 274	350	18%
Confectionery and chocolate	7 887	8 889	4%	1 914	2 248	335	17%
Vegetables	7 361	7 396	4%	2 014	2 075	61	3%
Spirits and liqueurs	6 820	8 408	4%	1 691	2 024	333	20%
Pet food and forage crops	6 505	7 343	4%	1 719	1 979	260	15%
Other animal products	6 510	7 531	4%	1 679	1 813	134	8%
Coffee, tea, cocoa and spices	5 932	6 176	3%	1 485	1 652	167	11%
Fruit and nuts	6 026	5 713	3%	1 437	1 462	25	2%
Other products	33 701	36 959	19%	8 877	10 052	1 175	13%

TABLE 5

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Mar21	Jan22-Mar22	Difference	
TOTAL AGRIFOOD	121 595	130 163	100%	29 377	38 018	8 641	29%
Brazil	11 362	13 537	10%	2 420	3 770	1 350	56%
United Kingdom	15 681	11 839	9%	2 240	3 379	1 140	51%
Ukraine	5 837	6 930	5%	1 441	2 382	941	65%
China	5 128	6 096	5%	1 325	2 200	875	66%
Australia	1 155	1 900	1%	470	937	467	99%
Cuba	176	176	0%	58	34	- 23	-41%
Mexico	1 047	1 191	1%	266	239	- 28	-10%
Nigeria	477	655	1%	202	100	- 102	-50%
Côte d'Ivoire	3 302	3 340	3%	927	818	- 109	-12%
Canada	3 131	2 830	2%	757	564	- 194	-26%
Other countries	74 299	81 667	63%	19 272	23 595	4 323	22%

TABLE 6

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Mar21	Jan22-Mar22	Difference	
TOTAL AGRIFOOD	121 595	130 163	100%	29 377	38 018	8 641	29%
Brazil	11 362	13 537	10%	2 420	3 770	1 350	56%
United Kingdom	15 681	11 839	9%	2 240	3 379	1 140	51%
United States	9 587	9 260	7%	2 728	2 928	200	7%
Ukraine	5 837	6 930	5%	1 441	2 382	941	65%
China	5 128	6 096	5%	1 325	2 200	875	66%
Turkey	4 652	5 031	4%	1 213	1 485	273	22%
Indonesia	4 334	5 613	4%	1 080	1 419	339	31%
Argentina	4 378	5 187	4%	969	1 295	325	34%
Switzerland	4 596	4 521	3%	1 085	1 200	115	11%
Morocco	2 471	2 628	2%	840	1 015	175	21%
Australia	1 155	1 900	1%	470	937	467	99%
India	2 364	2 919	2%	727	851	125	17%
Russian Federation	1 785	2 176	2%	460	843	383	83%
Côte d'Ivoire	3 302	3 340	3%	927	818	- 109	-12%
Peru	2 425	2 708	2%	645	772	127	20%
Other countries	42 538	46 477	36%	10 807	12 723	1 916	18%

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-Mar21	Jan22-Mar22	Difference	
TOTAL AGRIFOOD	121 595	130 163	100%	29 377	38 018	8 641	29%
Oilseeds and protein crops	15 114	18 269	14%	4 299	5 458	1 159	27%
Coffee, tea, cocoa and spices	15 944	17 062	13%	4 079	5 218	1 139	28%
Non-edible for technical use	5 841	7 476	6%	1 390	2 376	986	71%
Cereals	5 771	6 180	5%	1 299	2 224	925	71%
Vegetable oils (oilseeds and palm)	6 712	8 232	6%	1 485	2 367	882	59%
Sheep and goat	1 011	940	1%	210	272	62	30%
Wine and wine based products	1 776	1 664	1%	342	385	44	13%
Sugar and isoglucose	843	878	1%	181	223	42	23%
Pigmeat	415	294	0%	65	82	17	25%
Olives and olive oil	751	636	0%	170	163	- 7	-4%
Other products	67 415	68 532	53%	15 857	19 248	3 391	21%

TABLE 8

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Mar21	Jan22-Mar22	Difference	
TOTAL AGRIFOOD	121 595	130 163	100%	29 377	38 018	8 641	29%
Oilseeds and protein crops	15 114	18 269	14%	4 299	5 458	1 159	27%
Fruit and nuts	21 050	20 695	16%	5 070	5 231	161	3%
Coffee, tea, cocoa and spices	15 944	17 062	13%	4 079	5 218	1 139	28%
Non-edible for technical use	5 841	7 476	6%	1 390	2 376	986	71%
Vegetable oils (oilseeds and palm)	6 712	8 232	6%	1 485	2 367	882	59%
Cereals	5 771	6 180	5%	1 299	2 224	925	71%
Mixed food preparations and ingredients	5 182	5 586	4%	1 221	1 647	426	35%
Vegetables	4 146	4 278	3%	1 253	1 484	231	18%
Preparations of fruit, nuts and vegetables	5 412	5 420	4%	1 284	1 462	178	14%
Other animal products	4 658	4 647	4%	1 010	1 397	387	38%
Cereal preparations and milling products	3 757	3 851	3%	858	1 172	315	37%
Margarine and other oils and fats (vegetable)	3 023	3 938	3%	871	1 144	273	31%
Spirits and liqueurs	3 061	3 298	3%	531	890	359	68%
Pet food and forage crops	2 705	2 753	2%	613	831	218	35%
Tobacco, cigars and cigarettes	2 468	2 299	2%	573	736	163	28%
Other products	16 748	16 179	12%	3 540	4 379	839	24%

TABLE 9

AGRI-FOOD TRADE BALANCE (MILLION EUR)

TRADE BALANCE			
PRODUCT/PERIOD	Exports Jan22- Mar22	Imports Jan22- Mar22	Trade balance Jan22-Mar22
	million EUR		
TOTAL AGRIFOOD	51 693	38 018	13 676
Beef and veal	1 019	517	502
Pigmeat	3 153	82	3 071
Poultry and eggs	1 277	406	871
Sheep and goat	175	272	- 97
Dairy products	4 391	537	3 854
Other animal products	1 813	1 397	417
Cereals	3 719	2 224	1 495
Cereal preparations and milling products	5 027	1 172	3 854
Oilseeds and protein crops	686	5 458	-4 772
Vegetable oils (oilseeds and palm)	777	2 367	-1 590
Margarine and other oils and fats (vegetable)	517	1 144	- 627
Sugar and isoglucose	162	223	- 60
Confectionery and chocolate	2 248	646	1 603
Vegetables	2 075	1 484	591
Fruit	1 462	5 231	-3 769
Preparations of fruit, nuts and vegetables	2 274	1 462	812
Olives and olive oil	1 040	163	877
Wine and wine based products	3 870	385	3 485
Spirits and liqueurs	2 024	890	1 133
Beer, cider and other beverages	2 535	488	2 046
Coffee, tea, cocoa and spices	1 652	5 218	-3 566
Mixed food preparations and ingredients	3 420	1 647	1 773
Pet food and forage crops	1 979	831	1 148
Tobacco, cigars and cigarettes	1 460	736	724
Horticulture	1 323	607	716
Non-edible for technical use	1 207	2 376	-1 170
Unspecified	408	53	356



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