



European
Commission



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS IN APRIL 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 April 2022. In order to grasp the impact of the Russian aggression on Ukraine, April 2022 figures can be compared with the previous month (March 2022). Year-to-year change compares January-April period with the same period in 2021.

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: DROP IN EXPORTS TO RUSSIA AND CHINA IN APRIL WEIGHS ON EU TRADE BALANCE

EU agri-food exports declined by 5.4% in April compared to March 2022, weighted by exports to Russia (-26%) and to China (-11%). Total EU exports reached a value of **€17.9 billion** (still +8% compared to April 2021). This is particularly due to low pig meat and wheat exports to China and decline in cereals and oilseeds exports.

EU imported **€13.5 billion** in April, a slight decline compared to March (-1.2%). This is both price and quantity driven. This is due to an easing in world prices, notably for oilseeds and a decline in quantity imported, especially in cereals. In April 2022, the EU trade balance reached **€4.4 billion**, -16% compared to March. Over the period January-April 2022, EU trade flows are significantly higher compared to the same period last year (+10% for exports, +28% for imports).

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



Source: Comext



EU AGRI-FOOD EXPORTS

DECLINE OF EU EXPORTS TO RUSSIA IN APRIL. INCREASE TO UKRAINE AND AFRICA

In April 2022, EU agri-food exports decreased by 5.4% month-to-month. This monthly decrease is slightly smoother than previous years and exports are still 8% higher than April 2021.

EU exports in April are usually less dynamic than in March (see graph below). This year, the most significant decrease month-to-month occurred with EU exports to **Russia** (-26%, -EUR 128k). Both quantity exported and total value declined. Biggest value decline happened for cereals and oilseeds.

EU exports to **Ukraine** increased by 93% month-to-month. All EU export categories increased, except vegetable oils and vegetables. Particularly, EU exports of pigmeat, poultry and flours and flakes increased significantly, in volume terms.

EU exports to **sub-saharan Africa** increased in April, especially for oilseeds (+83%, in volumes), cereals (+27%) and cereals preparations (+14%). Unit value of these products also increased month-to-month. Dairy product exports slightly increased (+2%, in volumes).

Trade developments in January-April 2022

Looking at cumulative monthly trade in 2022, EU exports to the United Kingdom, the US and Japan increased the most compared to the same period

last year. Exports to China, Russia and Ukraine have been lower.

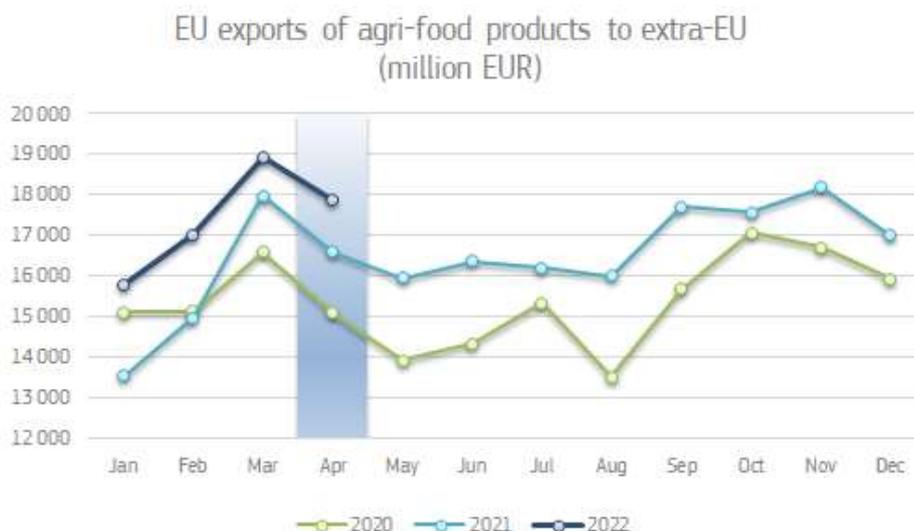
EU exports to **the UK** increased by 20% in Q1-2022, compared to low levels in Q1-2021. This was led by a sharp increase in butter (+69%, in volume), wheat (+25%) and maize (+46%) exports. In value terms, cereal preparations and milling products (+EUR 280k) and poultry and eggs (+EUR 270k) increased the most.

Regarding export flows to **China**, EU export values declined by EUR 2 billion compared to the same period last year. This is largely due to less pigmeat exports (-EUR 1.9 billion) and to a lesser extent rape oil exports (-EUR 156k). For both products, export volumes dropped. On the contrary, exports of cereal preparations (mainly price driven) and wheat increased.

EU CEREALS AND DAIRY PRODUCTS DYNAMIC SINCE JANUARY 2022

In the period January-April 2022, EU **cereals** exports increased the most (+26%, +EUR 1 million year-to-year). **Cereal preparations and milling products** (+15%, +EUR 881k) and **dairy products** (+13%, +EUR 714k) were also dynamic.

On the contrary, **pigmeat** and **horticulture** exports declined by 24% and 3% respectively. This is mainly due to the decline of pigmeat exports to China and of horticulture products to the UK and to Russia.



EU AGRI-FOOD IMPORTS

SLIGHT DECLINE IN EU IMPORT BILL IN APRIL 2022 MONTH-TO-MONTH

EU imports in April reached EUR 13.5 billion, 1.2% below the March figure. Most significant decline was recorded for imports from the United Kingdom and China while the biggest increase came from the United States.

Regarding **the UK**, the drop in import value is mainly coming from a decrease of quantities imported of spirits and liqueurs (-19%) as well as confectionery & chocolate (-24%) and cereal preparations and milling products (-17%).

EU imports in April from **China** decreased in almost all categories (mainly quantity driven). EU imports from China amounted to EUR 693 million in April. The EU imported less oilseed and protein crops (-69%, in volumes) as well as less coffee, tea, cocoa and spices (-25%) but the unit value of these products increased. The biggest imported category, other animal products (including honey, proteins, hides and skins and wool and silk), declined by 22% month-to-month.

Trade developments in January-April 2022

Looking at the period Jan-Apr 2022, EU imports from Brazil, the United Kingdom and China increased the most year-to-year. Import values increased respectively by 46%, 43% and 65%.

Cumulative monthly imports from **Brazil** reached EUR 5.4 billion in Jan-Apr 2022, led by soya beans and meals (EUR 2.5 billion) and coffee (EUR 1.4

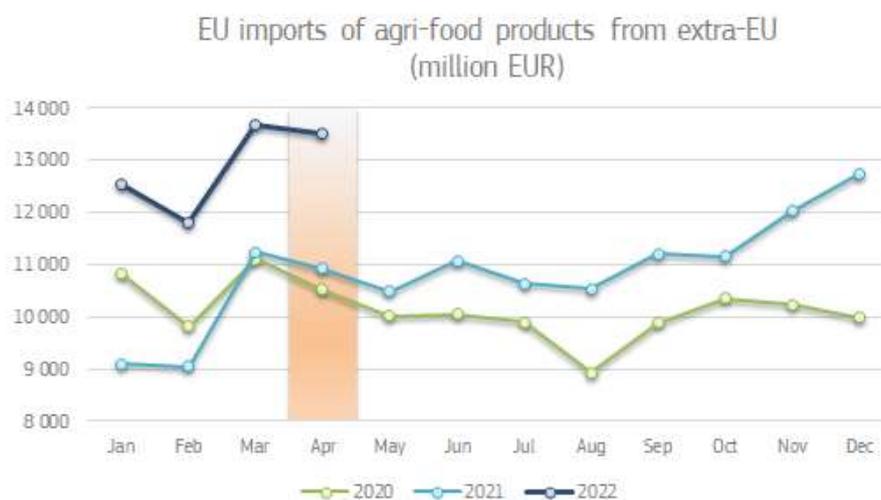
billion). Compared to the same period in 2021, unit import value of these products increased significantly. Coffee unit value increased by 96% while soya beans by 16%. For soya beans coming from the U.S., the unit value increased by 24%.

EU imports from **Ukraine** and **Australia** also increased substantially in the period Jan-Apr 2022 compared to last year. EU imports from Ukraine rose by 53% year-to-year, reaching EUR 2.9 billion. EU imports from Australia increased by 99%, reaching EUR 1.4 billion mainly from rapeseed and wool and silk imports (price and quantity driven). Wine imports also increased in value but volumes were stable.

HIGHEST IMPORT INCREASE FOR OILSEEDS AND PROTEIN CROPS IN APRIL 2022

The EU imports **coffee** mainly from Brazil, Vietnam and Uganda. Year-to-year, imports increased by 97%, 53% and 90%, respectively. In quantity terms, imports from Brazil and Vietnam remained stable, while imports from Uganda increased by 24% thanks to competitive price.

In March and April, EU **maize** imports from Ukraine declined significantly (-35% compared to March-April 2021) as well as from Serbia (-77%). Imports from the US, Canada, Moldova and Brazil partly compensated the loss. A slight increase of Russian origin was noted as well.



FOCUS (1/2)

EU MAIN IMPORT SOURCES BY CATEGORIES

PRODUCT	EU27 TRADE BALANCE 2021 (million t)	EU27 TRADE BALANCE 2021 (million EUR)	Main import sources	Share in import value
Oilseeds and protein crops	- 37.17	-16 119.95	Brazil Argentina United States	36% 16% 12%
Fruit and nuts	- 10.79	-14 982.67	United States Turkey Peru	11% 9% 7%
Coffee, tea, cocoa and spices	- 4.59	-10 886.18	Côte d'Ivoire Brazil Switzerland	16% 15% 10%
Vegetable oils (oilseeds and palm)	- 6.04	-5 421.10	Indonesia Ukraine Malaysia	28% 25% 16%
Non-edible for technical use	- 4.65	-3 302.71	Indonesia China Malaysia	24% 12% 9%
Margarine and other oils and fats (vegetable)	- 3.53	-2 120.08	Philippines Indonesia Malaysia	17% 14% 13%
Sheep and goat	0.0	- 365.10	United Kingdom New Zealand Australia	55% 38% 3%
Sugar and isoglucose	- 0.59	- 281.90	Brazil Mauritius Serbia	21% 9% 8%

FOCUS (2/2)

EU MAIN EXPORT DESTINATIONS BY CATEGORIES

PRODUCT	EU27 TRADE BALANCE 2021 (million €)	EU27 TRADE BALANCE 2021 (million EUR)	Main export destinations	Share in export value
Beef and veal	0.8	2 055.17	United Kingdom Israel Switzerland	38% 8% 5%
Horticulture	1.0	2 708.77	United Kingdom Switzerland Russian Federation	40% 13% 12%
Other animal products	1.6	2 884.05	United Kingdom China United States	19% 15% 14%
Preparations of fruit, nuts and vegetables	3.3	2 988.53	United Kingdom United States Switzerland	32% 14% 4%
Vegetables	2.7	3 117.78	United Kingdom Switzerland United States	38% 8% 7%
Tobacco, cigars and cigarettes	-0.2	3 212.38	Japan Norway United Kingdom	30% 10% 7%
Olive and olive oil	1.0	3 387.53	United States Brazil United Kingdom	34% 8% 8%
Poultry and eggs	1.6	3 515.26	United Kingdom Switzerland Ghana	43% 5% 5%
Pet food and forage crops	4.7	4 590.03	United Kingdom Russian Federation United States	19% 7% 7%
Spirits and liqueurs	0.6	5 110.48	United States China United Kingdom	39% 10% 9%
Cereals	25.3	5 817.18	Algeria China United Kingdom	12% 10% 6%
Confectionery and chocolate	0.9	6 591.33	United Kingdom United States Russian Federation	30% 13% 6%
Mixed food preparations and ingredients	1.8	6 678.40	United Kingdom United States Switzerland	18% 12% 5%
Beer, cider and other beverages	8.6	7 999.47	United States United Kingdom China	25% 19% 6%
Pigmeat	5.7	14 230.43	China United Kingdom Japan	36% 20% 9%
Cereal preparations and milling products	5.7	14 953.89	United Kingdom China United States	24% 13% 10%
Wine and wine based products	2.9	14 961.83	United States United Kingdom Switzerland	27% 19% 7%
Dairy products	5.5	15 249.54	United Kingdom China United States	17% 12% 9%

TABLE 1

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Apr21	Jan22-Apr22	Difference	
TOTAL AGRIFOOD	184 467	198 066	100%	63 088	69 592	6 504	10%
United Kingdom	41 962	41 934	21%	12 540	14 995	2 456	20%
United States	21 447	24 507	12%	7 398	8 854	1 456	20%
Japan	6 984	7 384	4%	2 245	2 661	416	19%
Switzerland	9 030	9 844	5%	3 354	3 747	392	12%
Korea, Republic of	3 029	3 940	2%	1 132	1 502	370	33%
Libya	868	932	0%	384	304	- 80	-21%
Hong Kong	2 541	2 157	1%	733	542	- 191	-26%
Ukraine	2 841	3 107	2%	1 024	796	- 228	-22%
Russian Federation	6 841	7 355	4%	2 456	2 202	- 254	-10%
China	17 684	17 137	9%	6 467	4 459	-2 008	-31%
Other countries	71 240	79 769	40%	25 354	29 528	4 174	16%

TABLE 2

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Apr21	Jan22-Apr22	Difference	
TOTAL AGRIFOOD	184 467	198 066	100%	63 088	69 592	6 504	10%
United Kingdom	41 962	41 934	21%	12 540	14 995	2 456	20%
United States	21 447	24 507	12%	7 398	8 854	1 456	20%
China	17 684	17 137	9%	6 467	4 459	- 2 008	-31%
Switzerland	9 030	9 844	5%	3 354	3 747	392	12%
Japan	6 984	7 384	4%	2 245	2 661	416	19%
Russian Federation	6 841	7 355	4%	2 456	2 202	- 254	-10%
Norway	4 844	5 407	3%	1 771	1 880	109	6%
Korea, Republic of	3 029	3 940	2%	1 132	1 502	370	33%
Canada	3 637	4 049	2%	1 193	1 444	251	21%
Morocco	2 165	2 366	1%	977	1 342	365	37%
Turkey	3 061	3 562	2%	1 199	1 328	129	11%
Saudi Arabia	4 305	3 630	2%	1 301	1 226	- 75	-6%
Australia	3 188	3 299	2%	972	1 144	171	18%
Algeria	2 989	2 950	1%	1 060	1 064	4	0%
Israel	2 141	2 648	1%	779	1 061	282	36%
Other countries	51 160	58 055	29%	18 244	20 682	2 438	13%

TABLE 3

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Apr21	Jan22-Apr22	Difference	
TOTAL AGRIFOOD	184 467	198 066	100%	63 088	69 592	6 504	10%
Cereals	11 414	12 001	6%	3 969	5 014	1 045	26%
Cereal preparations and milling products	18 778	18 805	9%	5 880	6 761	881	15%
Dairy products	15 988	17 010	9%	5 294	6 008	714	13%
Mixed food preparations and ingredients	11 208	12 264	6%	3 898	4 599	701	18%
Wine and wine based products	13 452	16 626	8%	4 783	5 341	558	12%
Fruit and nuts	6 026	5 713	3%	1 931	1 973	42	2%
Sheep and goat	617	575	0%	213	251	38	18%
Sugar and isoglucose	556	596	0%	171	206	35	21%
Horticulture	3 868	4 631	2%	1 823	1 763	- 59	-3%
Pigmeat	15 110	14 525	7%	5 495	4 201	-1 294	-24%
Other products	87 448	95 322	48%	29 632	33 474	3 842	13%

TABLE 4

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Apr21	Jan22-Apr22	Difference	
TOTAL AGRIFOOD	184 467	198 066	100%	63 088	69 592	6 504	10%
Cereal preparations and milling products	18 778	18 805	9%	5 880	6 761	881	15%
Dairy products	15 988	17 010	9%	5 294	6 008	714	13%
Wine and wine based products	13 452	16 626	8%	4 783	5 341	558	12%
Cereals	11 414	12 001	6%	3 969	5 014	1 045	26%
Mixed food preparations and ingredients	11 208	12 264	6%	3 898	4 599	701	18%
Pigmeat	15 110	14 525	7%	5 495	4 201	- 1 294	-24%
Beer, cider and other beverages	9 713	10 013	5%	3 109	3 410	301	10%
Preparations of fruit, nuts and vegetables	8 060	8 409	4%	2 609	3 068	458	18%
Confectionery and chocolate	7 886	8 889	4%	2 527	2 919	391	15%
Vegetables	7 361	7 396	4%	2 634	2 779	145	6%
Spirits and liqueurs	6 820	8 408	4%	2 385	2 774	389	16%
Pet food and forage crops	6 506	7 343	4%	2 314	2 651	337	15%
Other animal products	6 510	7 531	4%	2 305	2 440	135	6%
Coffee, tea, cocoa and spices	5 932	6 176	3%	1 991	2 203	212	11%
Fruit and nuts	6 026	5 713	3%	1 931	1 973	42	2%
Other products	33 701	36 960	19%	11 964	13 452	1 488	12%

TABLE 5

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Apr21	Jan22-Apr22	Difference	
TOTAL AGRIFOOD	121 594	130 173	100%	40 295	51 547	11 252	28%
Brazil	11 362	13 537	10%	3 693	5 385	1 692	46%
United Kingdom	15 680	11 849	9%	3 206	4 594	1 388	43%
China	5 128	6 097	5%	1 756	2 898	1 141	65%
Ukraine	5 837	6 930	5%	1 870	2 866	996	53%
Australia	1 155	1 900	1%	699	1 399	699	100%
Cameroon	697	694	1%	269	241	- 28	-11%
Mexico	1 047	1 191	1%	364	330	- 34	-9%
Nigeria	477	655	1%	266	152	- 114	-43%
Côte d'Ivoire	3 302	3 340	3%	1 263	1 127	- 136	-11%
Canada	3 131	2 830	2%	983	785	- 198	-20%
Other countries	73 778	81 149	62%	25 925	31 770	5 845	23%

TABLE 6

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Apr21	Jan22-Apr22	Difference	
TOTAL AGRIFOOD	121 594	130 173	100%	40 295	51 547	11 252	28%
Brazil	11 362	13 537	10%	3 693	5 385	1 692	46%
United Kingdom	15 680	11 849	9%	3 206	4 594	1 388	43%
United States	9 587	9 260	7%	3 370	3 822	452	13%
China	5 128	6 097	5%	1 756	2 898	1 141	65%
Ukraine	5 837	6 930	5%	1 870	2 866	996	53%
Turkey	4 652	5 031	4%	1 621	1 936	315	19%
Indonesia	4 334	5 613	4%	1 435	1 911	476	33%
Argentina	4 378	5 187	4%	1 427	1 874	447	31%
Switzerland	4 596	4 521	3%	1 423	1 566	142	10%
Morocco	2 471	2 628	2%	1 184	1 448	264	22%
Australia	1 155	1 900	1%	699	1 399	699	100%
India	2 364	2 919	2%	1 058	1 177	118	11%
Côte d'Ivoire	3 302	3 340	3%	1 263	1 127	- 136	-11%
Russian Federation	1 785	2 175	2%	615	1 048	433	70%
Peru	2 425	2 708	2%	846	1 003	157	19%
Other countries	42 538	46 478	36%	14 829	17 494	2 666	18%

TABLE 7

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2020	2021	Share 2021	Jan21-Apr21	Jan22-Apr22		
TOTAL AGRIFOOD	121 594	130 173	100%	40 295	51 547	11 252	28%
Oilseeds and protein crops	15 115	18 269	14%	5 904	7 527	1 623	27%
Coffee, tea, cocoa and spices	15 944	17 062	13%	5 511	6 980	1 469	27%
Non-edible for technical use	5 841	7 477	6%	1 941	3 262	1 321	68%
Cereals	5 771	6 181	5%	1 750	2 928	1 178	67%
Vegetable oils (oilseeds and palm)	6 712	8 232	6%	2 023	3 171	1 148	57%
Beer, cider and other beverages	1 943	2 013	2%	560	669	108	19%
Wine and wine based products	1 775	1 664	1%	470	519	49	10%
Sugar and isoglucose	843	878	1%	269	302	33	12%
Pigmeat	415	294	0%	88	114	26	30%
Olives and olive oil	751	636	0%	232	246	14	6%
Other products	66 484	67 466	52%	21 545	25 829	4 284	20%

TABLE 8

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2020	2021	Share 2021	Jan21-Apr21	Jan22-Apr22		
TOTAL AGRIFOOD	121 594	130 173	100%	40 295	51 547	11 252	28%
Oilseeds and protein crops	15 115	18 269	14%	5 904	7 527	1 623	27%
Fruit and nuts	21 050	20 695	16%	6 940	7 157	217	3%
Coffee, tea, cocoa and spices	15 944	17 062	13%	5 511	6 980	1 469	27%
Non-edible for technical use	5 841	7 477	6%	1 941	3 262	1 321	68%
Vegetable oils (oilseeds and palm)	6 712	8 232	6%	2 023	3 171	1 148	57%
Cereals	5 771	6 181	5%	1 750	2 928	1 178	67%
Mixed food preparations and ingredients	5 182	5 587	4%	1 690	2 205	514	30%
Vegetables	4 146	4 278	3%	1 710	2 037	327	19%
Preparations of fruit, nuts and vegetables	5 412	5 420	4%	1 728	1 972	244	14%
Other animal products	4 660	4 652	4%	1 368	1 853	485	35%
Margarine and other oils and fats (vegetable)	3 023	3 938	3%	1 196	1 602	406	34%
Cereal preparations and milling products	3 757	3 851	3%	1 194	1 541	347	29%
Spirits and liqueurs	3 060	3 296	3%	810	1 217	407	50%
Pet food and forage crops	2 705	2 754	2%	836	1 108	271	32%
Tobacco, cigars and cigarettes	2 468	2 299	2%	761	950	189	25%
Other products	16 748	16 180	12%	4 930	6 037	1 107	22%

TABLE 9

AGRI-FOOD TRADE BALANCE (MILLION EUR)

TRADE BALANCE			
PRODUCT/PERIOD	Exports Jan22-Apr22	Imports Jan22-Apr22	Trade balance Jan22-Apr22
	million EUR		
TOTAL AGRIFOOD	69 592	51 547	18 045
Beef and veal	1 367	756	611
Pigmeat	4 201	114	4 087
Poultry and eggs	1 735	576	1 159
Sheep and goat	251	420	- 169
Dairy products	6 008	731	5 277
Other animal products	2 440	1 853	587
Cereals	5 014	2 928	2 086
Cereal preparations and milling products	6 761	1 541	5 220
Oilseeds and protein crops	846	7 527	-6 681
Vegetable oils (oilseeds and palm)	1 089	3 171	-2 082
Margarine and other oils and fats (vegetable)	685	1 602	- 917
Sugar and isoglucose	206	302	- 95
Confectionery and chocolate	2 919	844	2 075
Vegetables	2 779	2 037	743
Fruit	1 973	7 157	-5 184
Preparations of fruit, nuts and vegetables	3 068	1 972	1 096
Olives and olive oil	1 483	246	1 236
Wine and wine based products	5 341	519	4 822
Spirits and liqueurs	2 774	1 217	1 557
Beer, cider and other beverages	3 410	669	2 741
Coffee, tea, cocoa and spices	2 203	6 980	-4 777
Mixed food preparations and ingredients	4 599	2 205	2 394
Pet food and forage crops	2 651	1 108	1 544
Tobacco, cigars and cigarettes	1 866	950	915
Horticulture	1 763	791	972
Non-edible for technical use	1 595	3 262	-1 666
Unspecified	566	69	497



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