



Agri-food Trade developments in 2016

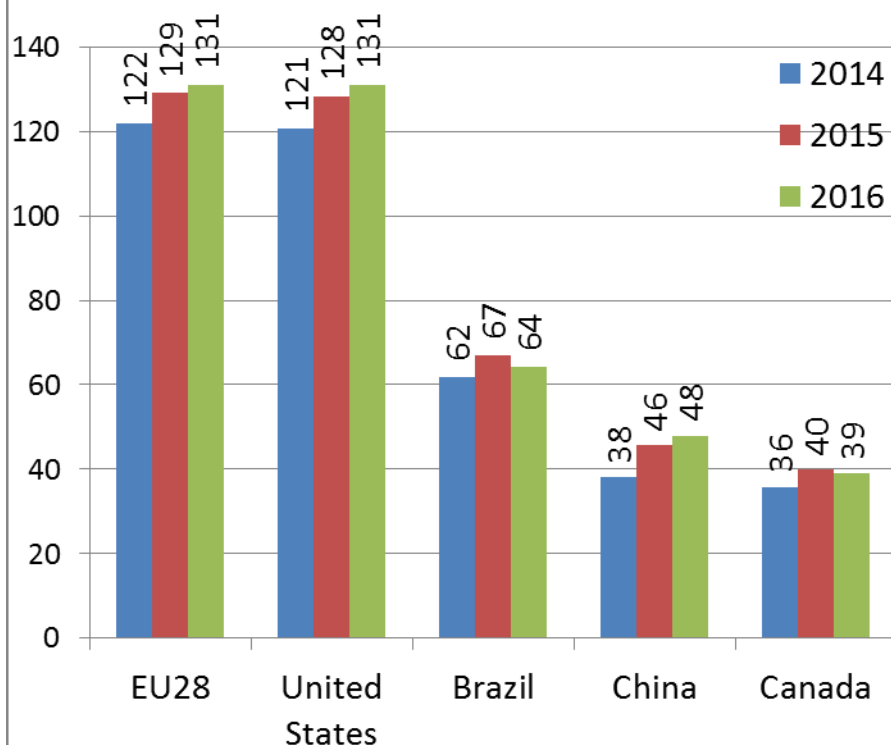
***CDG International Aspects of Agriculture
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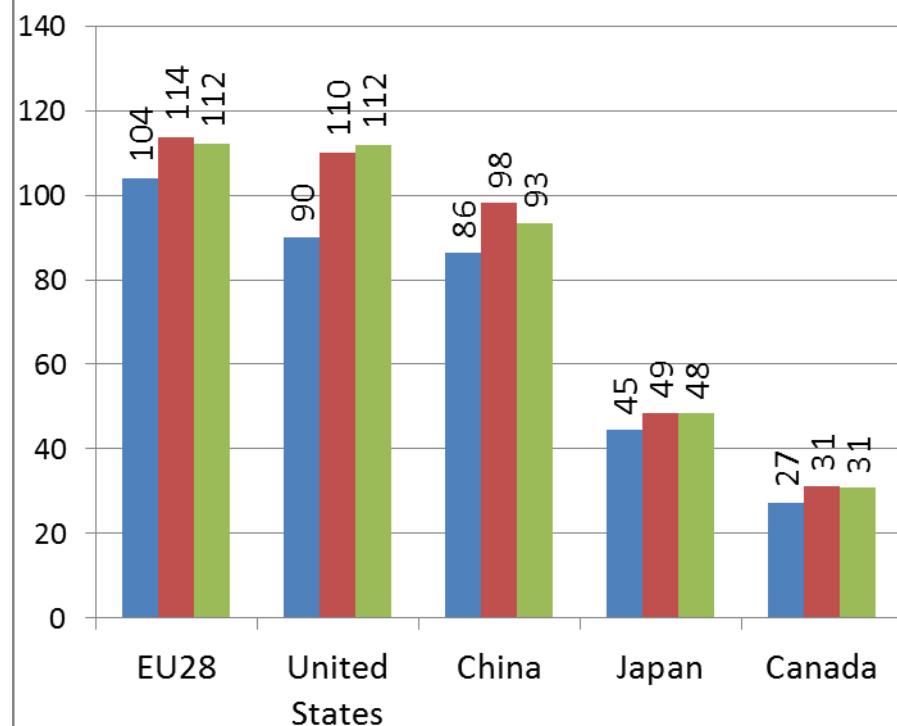
Mixed picture in world agri-food trade developments

Source: COMEXT GTA

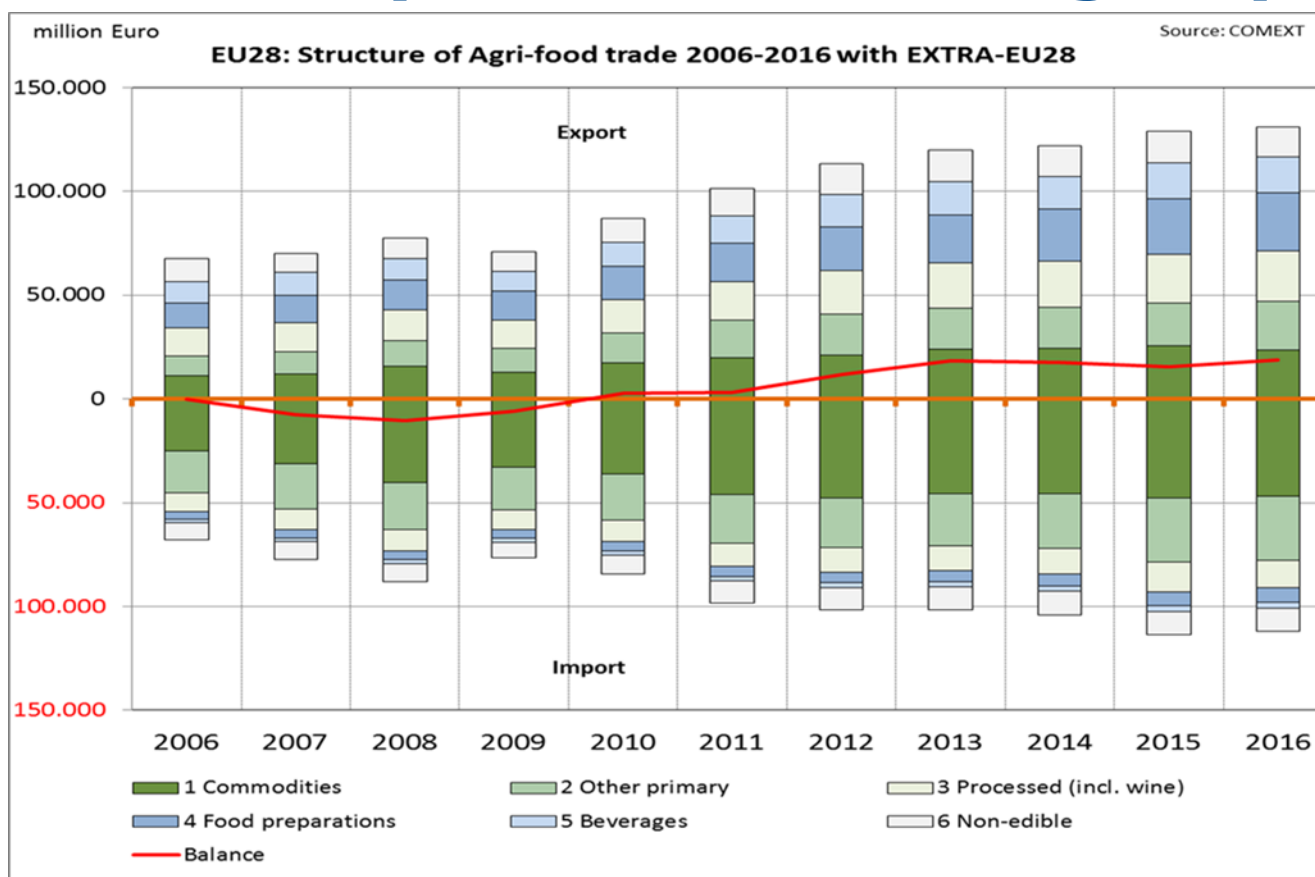
Exporters



Importers



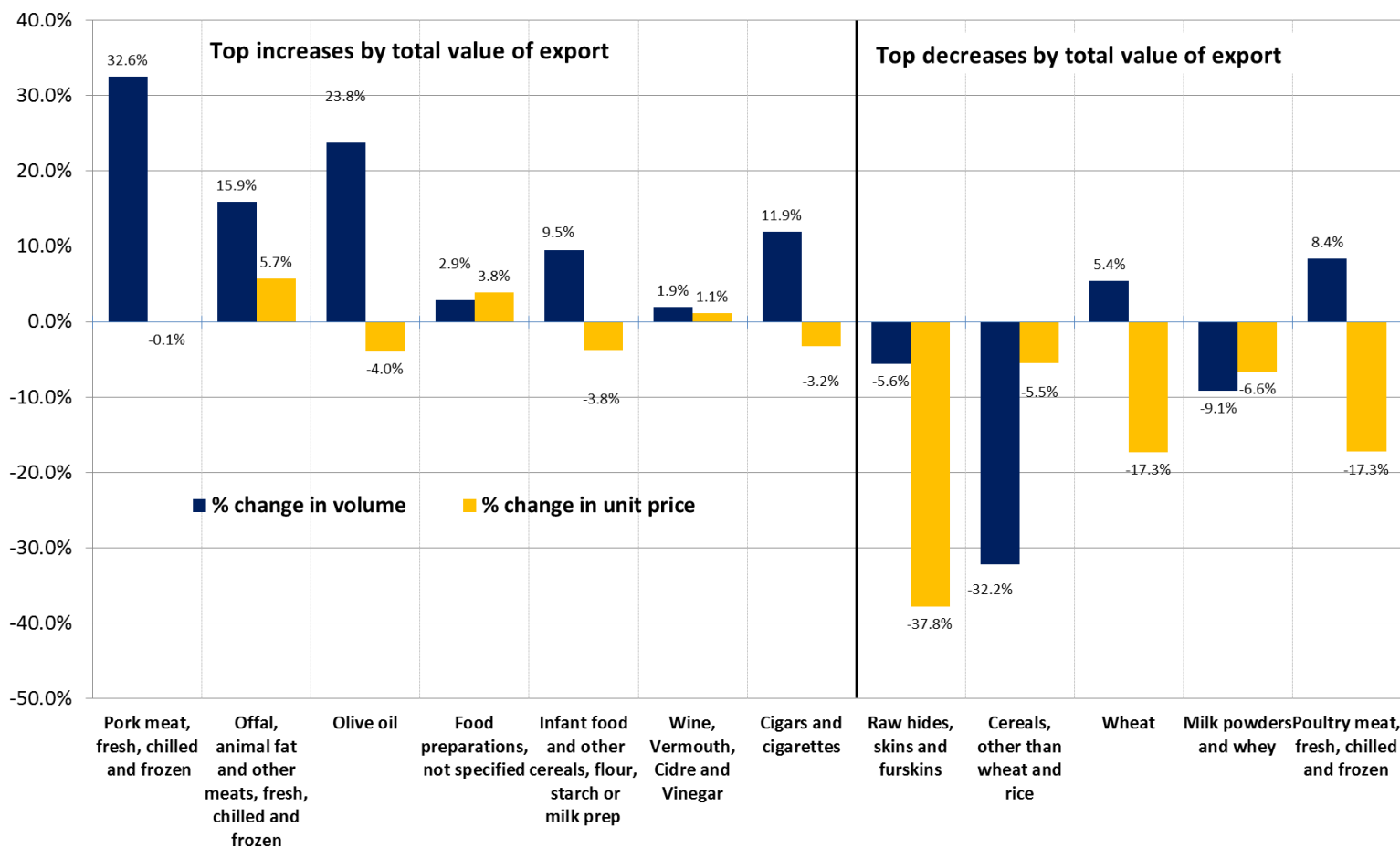
EU agri-food trade balance in 2016: record exports, decreasing imports



Most top increases due to quantity e.g. pork Most top decreases due to price – except cereals

Source: COMEXT

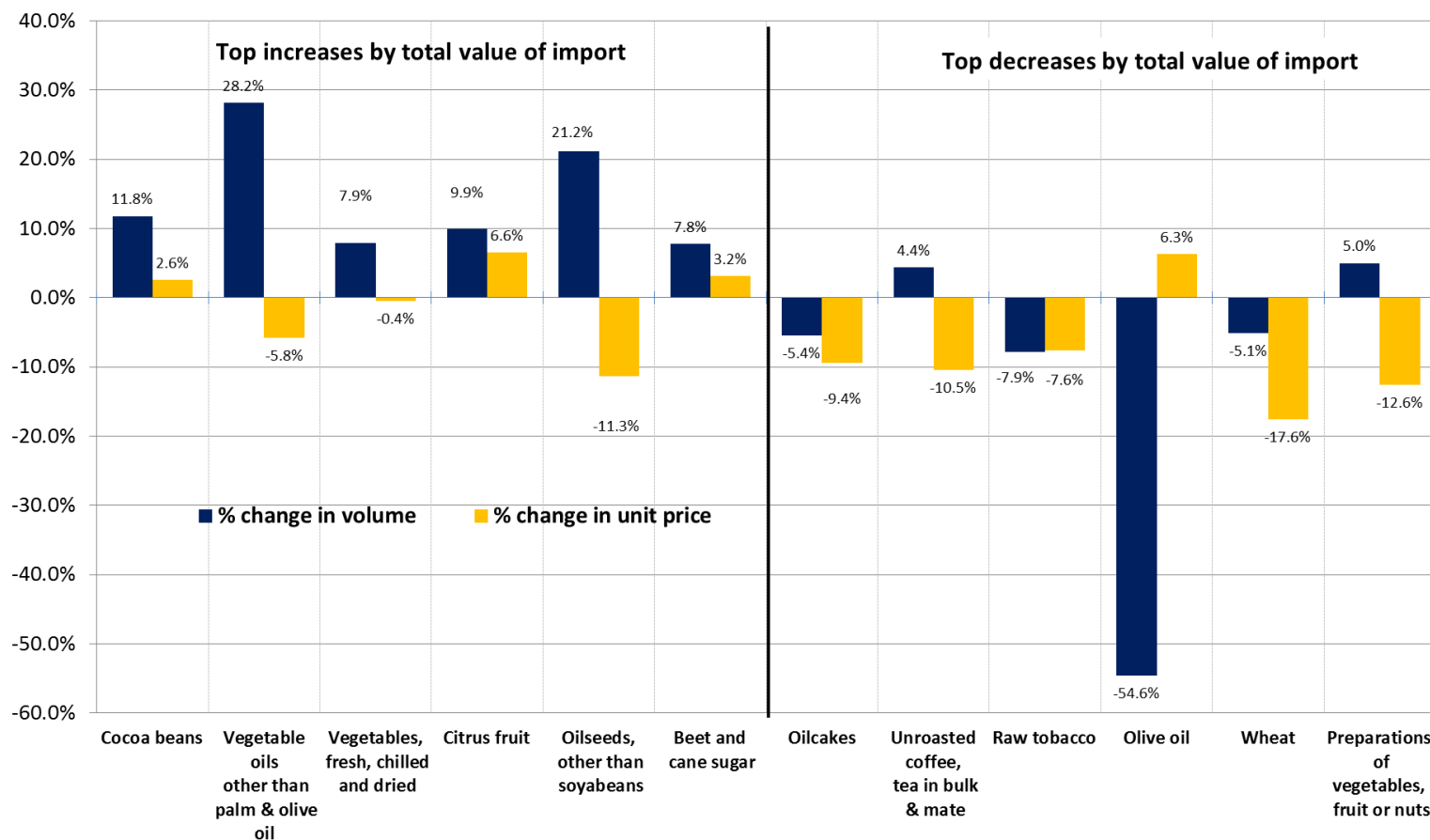
EU28 - Extra trade - Change in export volume and unit price - 2015/2016



Most import increases by volume decreases due to price effect – except olive oil

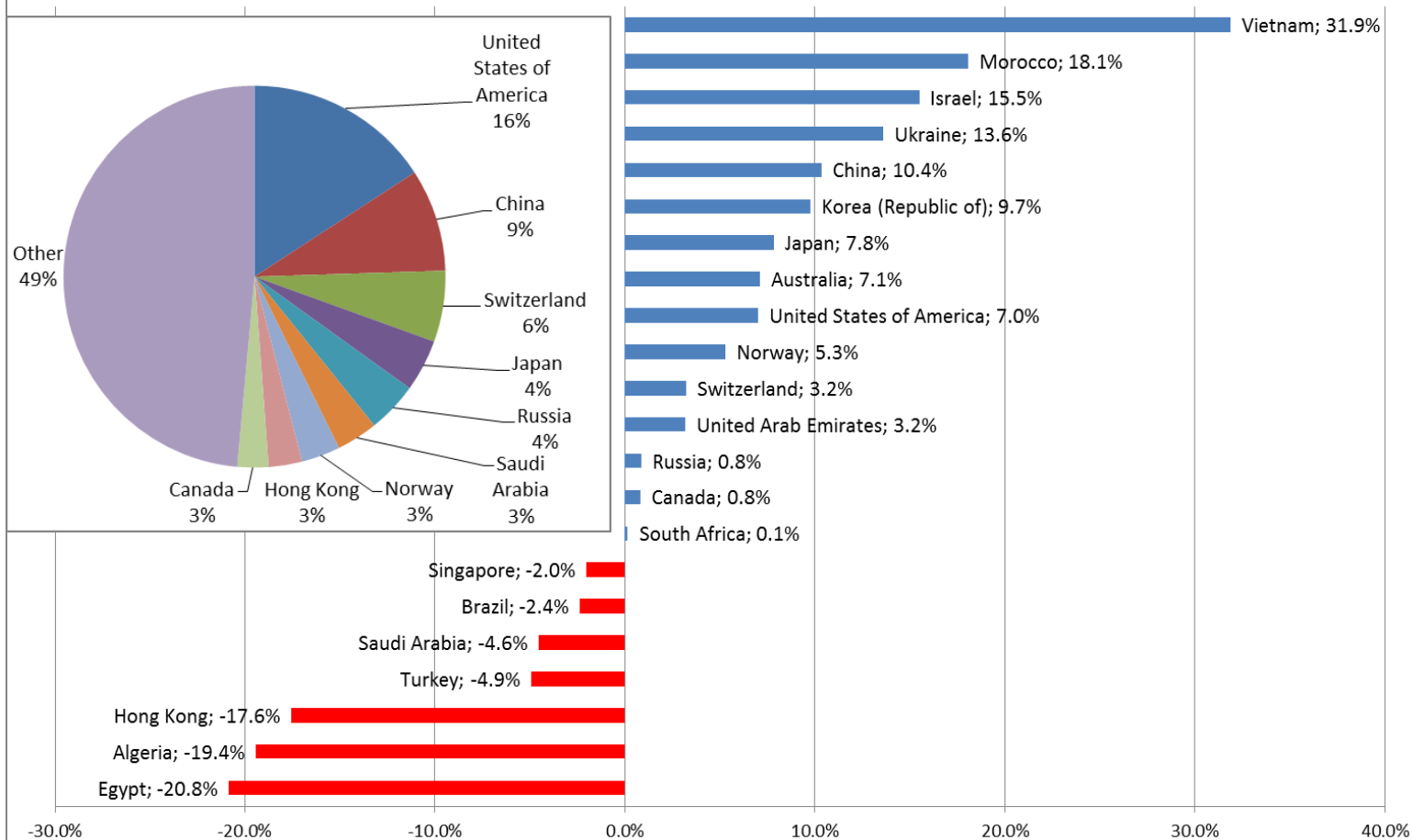
Source: COMEXT

EU28 - Extra trade - Change in import volume and unit price - 2015/2016

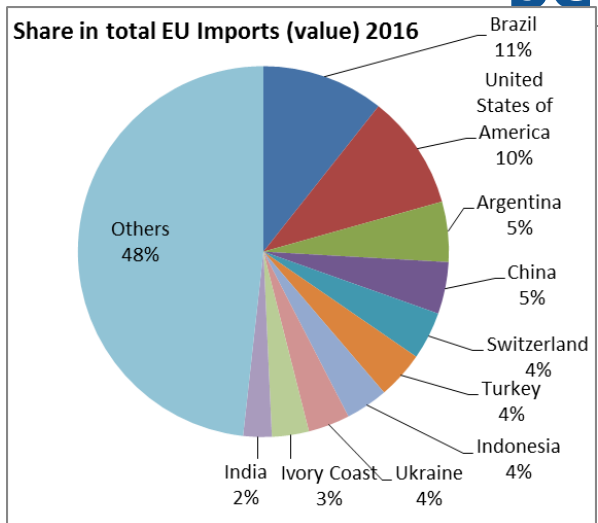


Exports: Russia now 5th destination, exports to Vietnam pick up

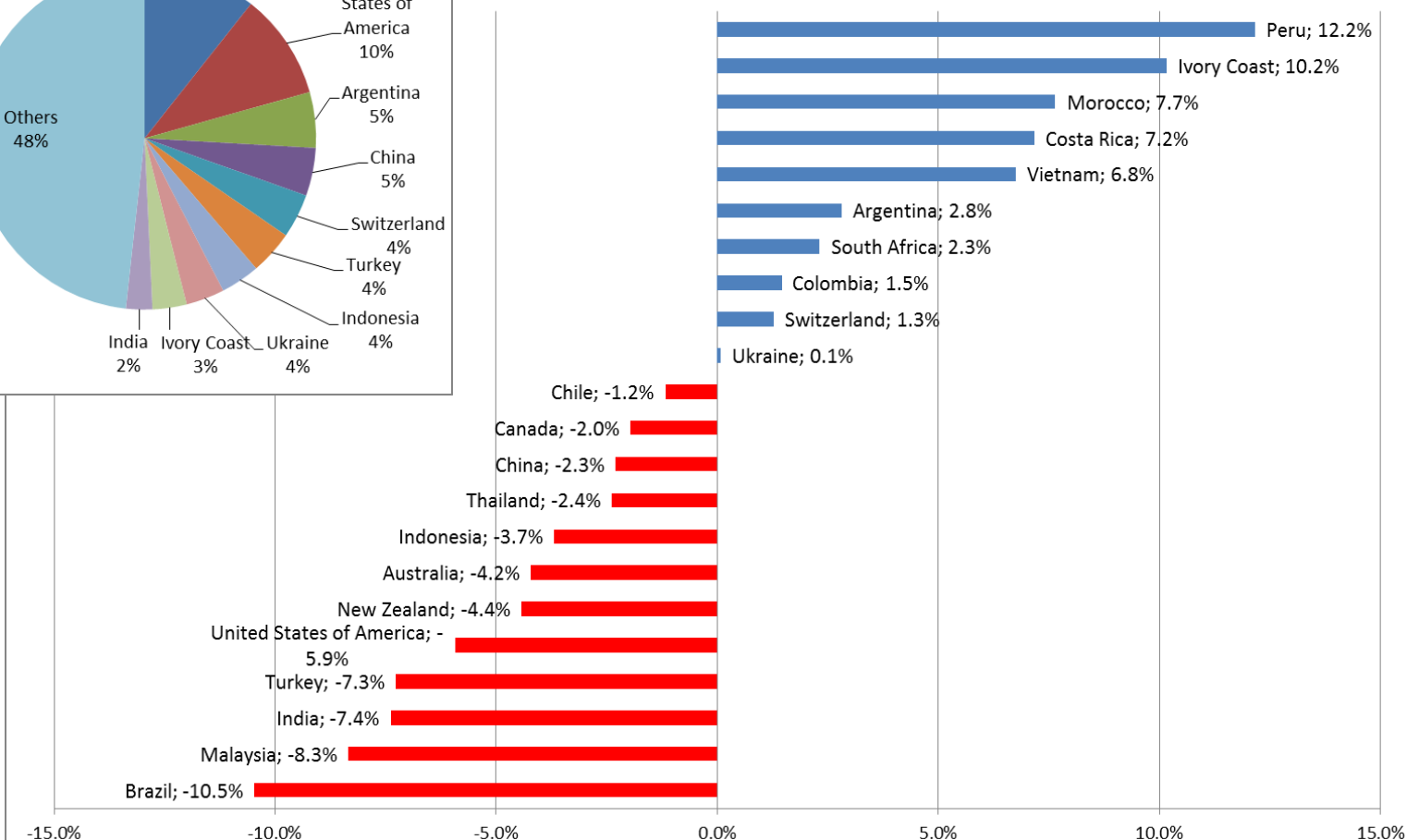
Change Export 2015-2016



Imports: more imports of cocoa beans benefit the Ivory Coast



Change Import 2015-2016





Medium Term Prospects (2026)

2016 EU Agricultural Outlook: main market results



Main cereals more dominant in area, but yield growth low

Increase of production and use of main cereals mainly driven by feed use

Meals more important in oilseed complex



World dairy demand to expand, especially in Africa and Asia

The EU to become first world exporter, just in front of NZ

A moderate production increase in the EU



Stable meat consumption in EU but growing world demand by 2026

EU meat production to grow moderately

88-95% of EU meat production goes to domestic consumer

2016 EU Agricultural Outlook: main market results



World sugar market deficit resulting in higher prices

EU to increase production after quota expiry in 2017

Competition from isoglucose and lower biofuels use



Most of EU biofuels demand remains policy driven

EU still a biodiesel market but ethanol shows some increase

Recent policy proposal for after 2020 compatible with outlook



Wine, olive oil, fruit and vegetables: important sectors but diversity of situations

Relative stagnation/decline of domestic consumption but exports keep growing. Adding value is key.

Impact on agricultural income



- Real income per farmer to maintain or slightly increase
- The expected increase in production costs offset by increasing value of production



- Real income for the overall sector to decline
- Income not projected to follow a steady pattern



Further Information

EU agri-food trade with all countries and regions:

http://ec.europa.eu/agriculture/trade-analysis/statistics/index_en.htm

Medium-term prospects for EU agricultural markets and income:

http://ec.europa.eu/agriculture/markets-and-prices/medium-term-outlook/index_en.htm

*Easy access to the texts of existing bilateral agreements
(trade profiles included):*

http://ec.europa.eu/agriculture/bilateral-relations/index_en.htm



Non edible
products

Non-edible products

Non-food and non-feed products (tobacco and cigarettes, raw hides and skins, cotton and other fibres, and ornamental flowers...)

Products of the
food and drink industry

Beverages

spirits, waters, soft drinks and beers

Food preparations

multi-ingredient products the agricultural component of which represents only a small part of the final value (confectioneries, chocolate, pasta, biscuits, infant food)

Agricultural
food and feed products

Agricultural processed products incl. wine

wine, cheese, olive oil, processed fruits and vegetables...

Other primary agricultural products

meat, fruit and vegetables

Commodities

highly standardised products mostly traded in bulk (cereals, vegetable oils, milk powders, cocoa, coffee beans...)

EU28 Agri-food import and export (2014)

