



European
Commission



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS IN JANUARY 2023

Publication: April 2023

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Data source: Eurostat COMEXT

Extraction date for statistics: 17/04/2023

Next issue will be published on 29/05/2023

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Note to the reader

The latest available consolidated trade data at EU level cover market developments in January 2023. 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:

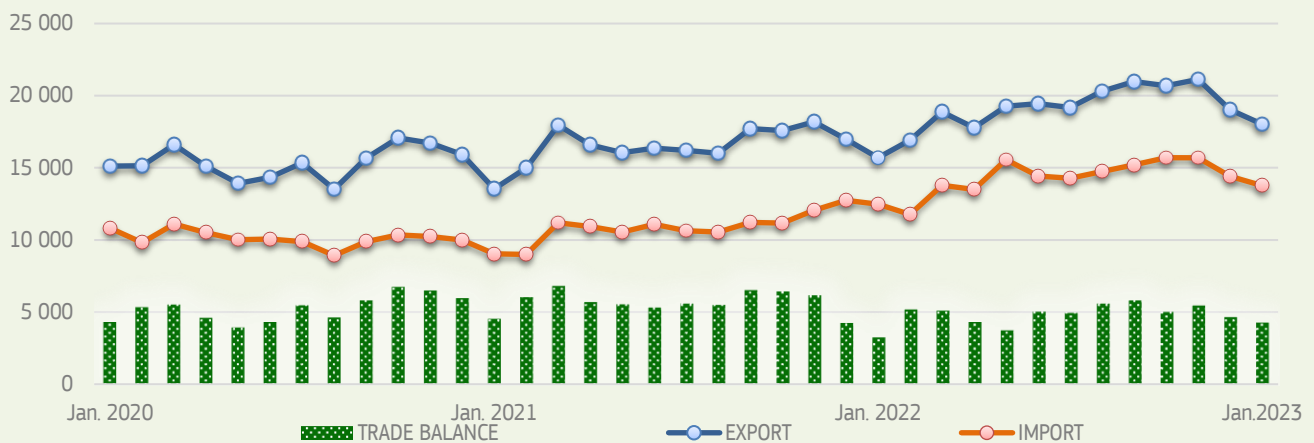
EU agri-food trade slow down in January 2023

In January 2023, agri-food trade (exports + imports) reached EUR 31.8 billion, after a sharp decline in December. This downward trend after the bump at the end of the year has been a usual pattern in recent years. Still, exports amounted EUR 18 billion and imports were at EUR 13.8 billion.

The EU trade balance for cereal preparations and milling products showed the most important surplus of all agri-food products (+EUR 1.4 billion). For cereals, the trade balance was also positive at +EUR 619 million. Looking at the beverage industry (wine, spirits and liqueurs and other beverages), the EU trade balance in January reached EUR 2.0 billion. Food industry products (including mixed food preparations and confectionery and chocolate) had a positive trade balance of EUR 1.7 billion.

Conversely, the EU had a negative trade balance in the meat sector. In January, the trade balance was negative for beef and veal (- EUR 1.8 billion), sheep and goat meat (- EUR 1.3 billion), poultry and eggs (- EUR 1.2 billion) and for pigmeat (- EUR 695 million).

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



Source: Comext



EU AGRI-FOOD EXPORTS

DECLINE IN EU EXPORT VALUES AT THE BEGINNING OF THE YEAR 2023

In January 2023 **EU agri-food exports** declined compared to December but still reached a value of **EUR 18.0 billion** (+EUR 2.3 billion compared to January 2022, +15%). The United Kingdom remains by far the first destination of EU agri-food exports, representing 22% of the total. The United States is second, with 11% and China remains third with 7%.

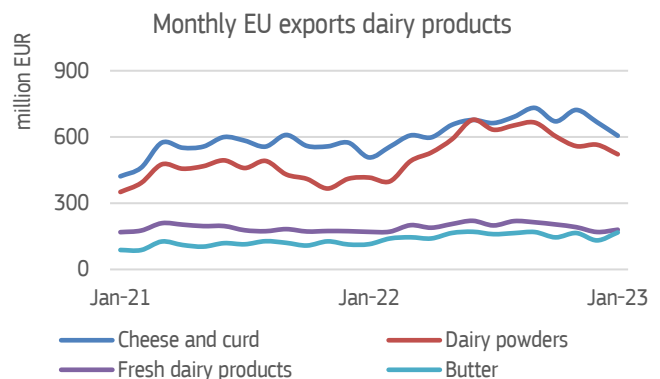
EU exports to **the UK** amounted EUR 3.9 billion. Compared to January 2022, exports to UK increased by EUR 0.6 billion. This is a 17% increase year-to-year. Export values of cereal preparations and mixed food preparations to the UK were 35% and 14% higher than January 2022, respectively. Wine exports to the UK were down by 9% compared to January 2022 and reached the lowest point for the past two years. This is driven mainly by a decline in quantities.

EU exports to **the US** totalled EUR 2.0 billion in January 2023 (+8% compared to January last year). For wine, the leading export product to the US, values continued their decline seen in the past months, since their highest point in May 2022. For spirits and liqueurs, despite the rebound in January, EU exports are still at a two-year low. For both wine and spirits, this is due to a decline in volumes exported. Regarding cereal preparations and mixed food preparations, EU exports to the US reached pre-war levels, in both quantity and value terms.

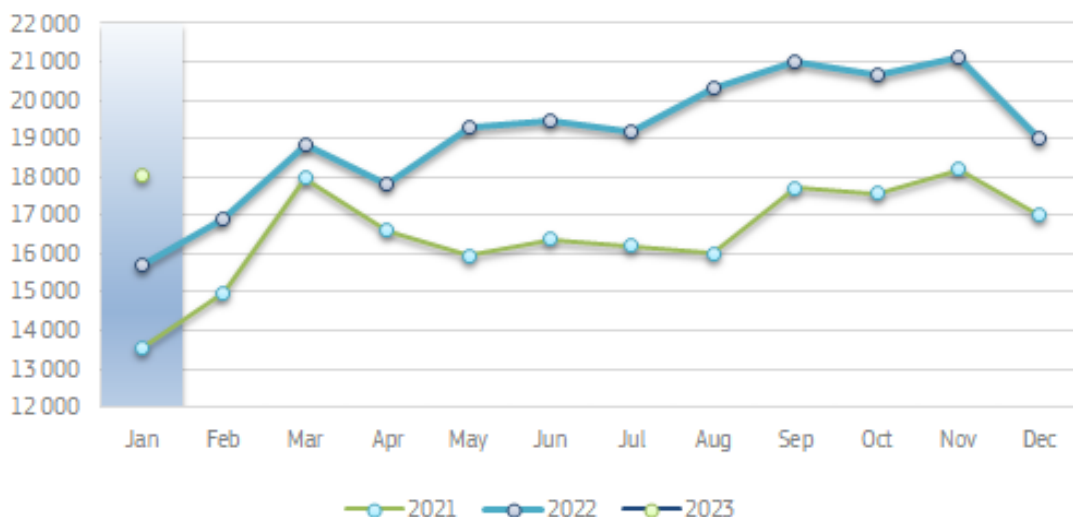
EU exports to **China** in January 2023 reached EUR 1.3 billion. It is a 19% increase year-to-year (+EUR 201 million). Despite the increase of EU pigmeat exports along the second semester of 2022, monthly exports in January 2023 fell by 16% (-207 thousand tonnes compared to December 2022). It is slightly below last year in January (-4%). EU exports of cereal preparations and milling products are keeping their upward trend over the past year (+57% year-to-year in value terms, +11% in quantity).

MOST OF EXPORT VALUES STILL HIGHER THAN JANUARY 2022

In January 2023, the EU exported mainly **cereal preparations and milling products** (EUR 1.9 billion EUR, +28% year-to-year). Cereals exports are also slightly up compared to last year (+4%) and reached EUR 1.1 billion. **Dairy products** are also higher than in January 2022 (+19%) and reached EUR 1.6 billion, mostly thanks to cheese and curd and dairy powders.



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



EU AGRI-FOOD IMPORTS

BRAZIL AND UKRAINE: MAIN SOURCES OF EU IMPORTS IN JANUARY 2023

In **January 2023**, EU agri-food imports reached **EUR 13.8 billion** (+EUR 1.3 billion year-to-year, +10%). Brazil remained the first import source for the EU, representing 10% of total imports. Ukraine ranked second, with 9% of imports in 2022. The US is the third import source of EU agri-food imports.

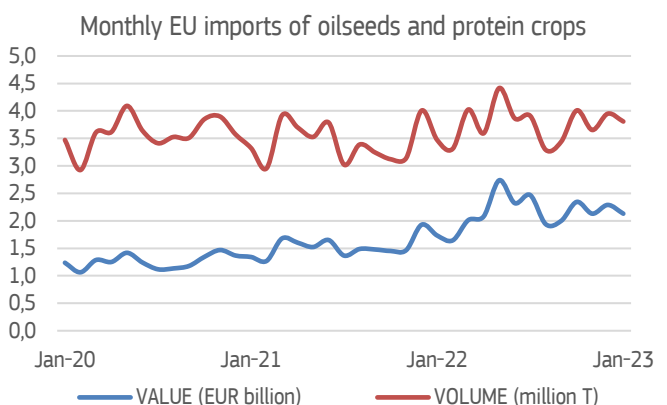
EU agri-food imports from **Brazil** reached EUR 1.3 billion in January 2023. This confirms Brazil as the first import source of the EU. Commodity prices in January 2023 remained high and EU import values from Brazil were 20% higher than January 2022. Maize imports increased most compared to January 2022 (+259%, +EUR 144 million)

In January 2023, EU imports from **Ukraine** increased by 16% year-to-year, to reach EUR 1.2 billion. While still high, EU imports of cereals declined for the second month in a row in January, reaching a value of EUR 608 million. Vegetable oil imports also dropped to EUR 138 million (-54% year-to-year) due to less volumes imported (106 thousand tonnes were imported in January 2023, compared to 241 thousand tonnes in January 2022). Fruit and nuts imports also declined compared to last year (-53%) to reach EUR 11.9 million.

OVERALL LESS DYNAMIC EU IMPORTS IN JANUARY 2023

EU **cereals** imports increased the most in January 2023, compared to last year. Import values are still 50% higher year-to-year, led by prices that remained elevated during this month and with dynamic trade. Indeed, the EU imported 3.9 million t in January 2023. This was slightly less compared to the previous month but still elevated compared to the same month in previous years.

Imports of **oilseeds and protein crops** remained relatively stable in the recent months. In January 2023, the EU imported 3.8 million t of oilseeds and protein crops (+10% year-to-year). This represents a value of EUR 2.1 billion (+23% year-to-year).



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

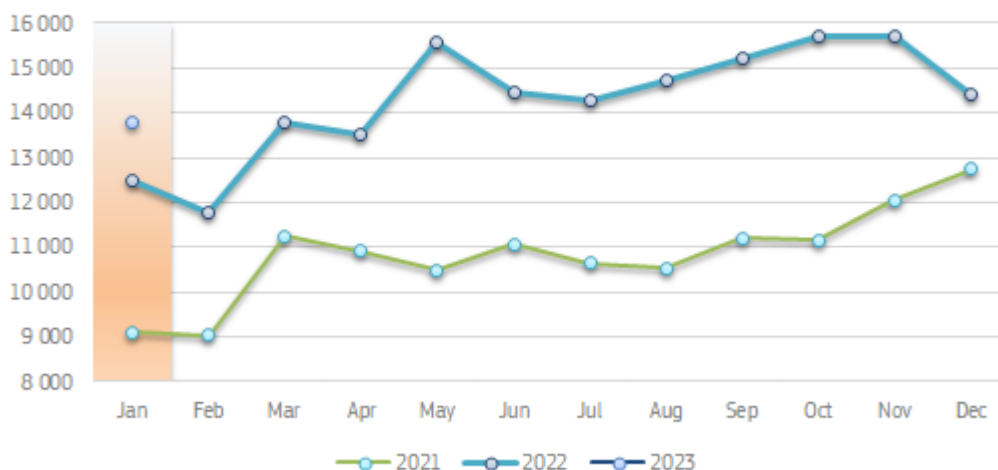


TABLE 1

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2021	2022	Share 2022	Jan22	Jan23		
TOTAL AGRIFOOD	198 141	229 304	100%	15 691	18 028	2 336	15%
United Kingdom	41 946	47 859	21%	3 366	3 945	579	17%
China	17 148	15 803	7%	1 054	1 255	201	19%
United States	24 518	28 989	13%	1 892	2 044	152	8%
Switzerland	9 858	11 187	5%	826	936	110	13%
Türkiye	3 569	4 159	2%	325	433	108	33%
Canada	4 049	4 725	2%	319	306	- 13	-4%
Sudan	204	257	0%	44	25	- 20	-44%
Korea, Republic of	3 940	4 608	2%	351	315	- 36	-10%
Tunisia	558	1 071	0%	102	60	- 42	-41%
Egypt	2 184	2 843	1%	241	162	- 78	-33%
Other countries	90 167	107 802	47%	7 173	8 547	1 374	19%

TABLE 2

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2021	2022	Share 2022	Jan22	Jan23		
TOTAL AGRIFOOD	198 141	229 304	100%	15 691	18 028	2 336	15%
United Kingdom	41 946	47 859	21%	3 366	3 945	579	17%
United States	24 518	28 989	13%	1 892	2 044	152	8%
China	17 148	15 803	7%	1 054	1 255	201	19%
Switzerland	9 858	11 187	5%	826	936	110	13%
Russian Federation	7 341	7 129	3%	661	660	- 2	0%
Japan	7 378	8 315	4%	608	600	- 9	-1%
Norway	5 412	5 952	3%	408	485	77	19%
Türkiye	3 569	4 159	2%	325	433	108	33%
Saudi Arabia	3 631	4 817	2%	279	360	81	29%
Morocco	2 368	4 010	2%	278	357	78	28%
Korea, Republic of	3 940	4 608	2%	351	315	- 36	-10%
Canada	4 049	4 725	2%	319	306	- 13	-4%
Australia	3 302	3 832	2%	272	304	32	12%
United Arab Emirates	2 346	3 256	1%	202	269	66	33%
Israel	2 649	3 174	1%	221	262	41	18%
Other countries	58 685	71 487	31%	4 631	5 500	869	19%

TABLE 3

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22	Jan23	Difference	
TOTAL AGRIFOOD	198 141	229 304	100%	15 691	18 028	2 336	15%
Cereal preparations and milling products	18 814	22 930	10%	1 510	1 940	430	28%
Dairy products	16 990	20 400	9%	1 345	1 597	252	19%
Preparations of fruit, nuts and vegetables	8 415	10 496	5%	696	910	215	31%
Vegetable oils (oilseeds and palm)	2 810	4 023	2%	223	407	184	83%
Confectionery and chocolate	8 885	10 266	4%	703	875	172	24%
Wine and wine based products	16 641	18 255	8%	1 105	1 116	11	1%
Sheep and goat	578	679	0%	39	47	8	21%
Non-edible for technical use	4 171	4 810	2%	382	375	- 7	-2%
Spirits and liqueurs	8 413	9 744	4%	644	637	- 8	-1%
Sugar and isoglucose	596	619	0%	60	51	- 9	-15%
Other products	111 827	127 082	55%	8 985	10 073	1 088	12%

TABLE 4

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22	Jan23	Difference	
TOTAL AGRIFOOD	198 141	229 304	100%	15 691	18 028	2 336	15%
Cereal preparations and milling products	18 814	22 930	10%	1 510	1 940	430	28%
Dairy products	16 990	20 400	9%	1 345	1 597	252	19%
Mixed food preparations and ingredients	12 263	14 873	6%	1 026	1 158	132	13%
Cereals	11 993	16 856	7%	1 086	1 154	68	6%
Wine and wine based products	16 641	18 255	8%	1 105	1 116	11	1%
Pigmeat	14 527	13 791	6%	986	1 057	71	7%
Preparations of fruit, nuts and vegetables	8 415	10 496	5%	696	910	215	31%
Confectionery and chocolate	8 885	10 266	4%	703	875	172	24%
Beer, cider and other beverages	10 002	10 917	5%	781	862	81	10%
Vegetables	7 408	8 262	4%	683	781	98	14%
Pet food and forage crops	7 361	8 573	4%	624	688	64	10%
Spirits and liqueurs	8 413	9 744	4%	644	637	- 8	-1%
Other animal products	7 531	8 199	4%	565	630	65	11%
Coffee, tea, cocoa and spices	6 180	7 369	3%	514	630	116	23%
Tobacco, cigars and cigarettes	5 504	6 154	3%	460	562	102	22%
Other products	37 214	42 218	18%	2 963	3 429	467	16%

TABLE 5

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22	Jan23	Difference	
TOTAL AGRIFOOD	130 122	171 562	100%	12 470	13 775	1 305	10%
Brazil	13 548	20 163	12%	1 106	1 325	218	20%
Ukraine	6 927	13 205	8%	1 037	1 202	165	16%
United Kingdom	11 874	15 260	9%	1 016	1 156	140	14%
Canada	2 834	2 973	2%	257	381	124	48%
Australia	1 901	3 756	2%	278	393	115	41%
Moldova, Republic of	517	1 104	1%	86	56	- 30	-35%
Algeria	134	148	0%	39	8	- 31	-80%
Russian Federation	2 175	2 313	1%	219	185	- 34	-15%
Philippines	1 019	1 514	1%	120	74	- 47	-39%
China	6 109	9 789	6%	765	702	- 63	-8%
Other countries	83 083	101 339	59%	7 546	8 294	748	10%

TABLE 6

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22	Jan23	Difference	
TOTAL AGRIFOOD	130 122	171 562	100%	12 470	13 775	1 305	10%
Brazil	13 548	20 163	12%	1 106	1 325	218	20%
Ukraine	6 927	13 205	8%	1 037	1 202	165	16%
United States	9 254	12 265	7%	1 139	1 182	42	4%
United Kingdom	11 874	15 260	9%	1 016	1 156	140	14%
China	6 109	9 789	6%	765	702	- 63	-8%
Türkiye	5 033	5 623	3%	517	560	43	8%
Indonesia	5 649	6 711	4%	473	538	64	14%
Argentina	5 171	6 961	4%	428	481	53	12%
Australia	1 901	3 756	2%	278	393	115	41%
Switzerland	4 523	4 846	3%	380	389	9	2%
Canada	2 834	2 973	2%	257	381	124	48%
Morocco	2 639	3 256	2%	332	338	7	2%
Côte d'Ivoire	3 259	3 509	2%	252	304	53	21%
Peru	2 711	3 390	2%	289	282	- 7	-2%
India	2 921	3 664	2%	274	277	4	1%
Other countries	45 769	56 192	33%	3 927	4 265	339	9%

TABLE 7

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22	Jan23	Difference	
TOTAL AGRIFOOD	130 122	171 562	100%	12 470	13 775	1 305	10%
Cereals	6 188	12 734	7%	895	1 343	448	50%
Oilseeds and protein crops	18 250	25 702	15%	1 733	2 130	398	23%
Tobacco, cigars and cigarettes	2 306	3 702	2%	202	371	169	84%
Coffee, tea, cocoa and spices	16 946	21 946	13%	1 651	1 752	101	6%
Sugar and isoglucose	878	1 399	1%	63	150	87	139%
Horticulture	1 928	2 097	1%	178	173	- 5	-3%
Margarine and other oils and fats (vegetable)	3 931	5 114	3%	397	391	- 6	-1%
Non-edible for technical use	7 489	11 633	7%	742	724	- 18	-2%
Mixed food preparations and ingredients	5 590	6 706	4%	554	496	- 58	-10%
Vegetable oils (oilseeds and palm)	8 239	11 026	6%	878	700	- 178	-20%
Other products	58 376	69 505	41%	5 177	5 545	368	7%

TABLE 8

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2021	2022	Share 2022	Jan22	Jan23	Difference	
TOTAL AGRIFOOD	130 122	171 562	100%	12 470	13 775	1 305	10%
Oilseeds and protein crops	18 250	25 702	15%	1 733	2 130	398	23%
Coffee, tea, cocoa and spices	16 946	21 946	13%	1 651	1 752	101	6%
Fruit and nuts	20 720	22 196	13%	1 693	1 702	10	1%
Cereals	6 188	12 734	7%	895	1 343	448	50%
Non-edible for technical use	7 489	11 633	7%	742	724	- 18	-2%
Vegetable oils (oilseeds and palm)	8 239	11 026	6%	878	700	- 178	-20%
Preparations of fruit, nuts and vegetables	5 419	6 527	4%	505	535	30	6%
Mixed food preparations and ingredients	5 590	6 706	4%	554	496	- 58	-10%
Other animal products	4 668	6 085	4%	439	486	47	11%
Vegetables	4 283	5 070	3%	460	475	15	3%
Cereal preparations and milling products	3 856	4 862	3%	402	445	43	11%
Margarine and other oils and fats (vegetable)	3 931	5 114	3%	397	391	- 6	-1%
Tobacco, cigars and cigarettes	2 306	3 702	2%	202	371	169	84%
Spirits and liqueurs	3 301	4 415	3%	255	315	60	23%
Pet food and forage crops	2 761	3 518	2%	279	294	16	6%
Other products	16 175	20 328	12%	1 384	1 614	230	17%

TABLE 9

AGRI-FOOD TRADE BALANCE (MILLION EUR)

TRADE BALANCE			
PRODUCT/PERIOD	Exports Jan23	Imports Jan23	Trade balance Jan23
	million EUR		
TOTAL AGRIFOOD	18 028	13 775	4 253
Cereal preparations and milling products	1 940	496	1 444
Mixed food preparations and ingredients	1 158	164	994
Wine and wine based products	1 116	205	911
Dairy products	1 597	724	873
Confectionery and chocolate	875	173	702
Beer, cider and other beverages	862	180	682
Cereals	1 154	535	619
Preparations of fruit, nuts and vegetables	910	294	616
Pet food and forage crops	688	134	554
Coffee, tea, cocoa and spices	630	150	481
Tobacco, cigars and cigarettes	562	87	476
Spirits and liqueurs	637	198	439
Vegetables	781	371	410
Non-edible for technical use	375	30	345
Horticulture	346	47	298
Fruit and nuts	514	315	199
Olives and olive oil	377	247	131
Unspecified	86	0	86
Vegetable oils (oilseeds and palm)	407	475	- 68
Other animal products	630	700	- 69
Oilseeds and protein crops	252	486	- 235
Margarine and other oils and fats (vegetable)	189	445	- 257
Sugar and isoglucose	51	391	- 341
Pigmeat	1 057	1 752	- 695
Poultry and eggs	465	1 702	-1 238
Sheep and goat	47	1 343	-1 296
Beef and veal	322	2 130	-1 808
<i>Fish and fish products</i>	676	2 635	-1 959
TOTAL AGRIFOOD AND FISH	18 704	16 410	2 294



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