



2. EU agri-food trade developments

DG AGRI G.1

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Trade developments for first half 2023

Trade by agri-food categories

Trade by main trading partners

Elements on EU agri-food trade diversification

By agri-food categories

By main trading partners



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Evolution of EU agri-food trade since 2020

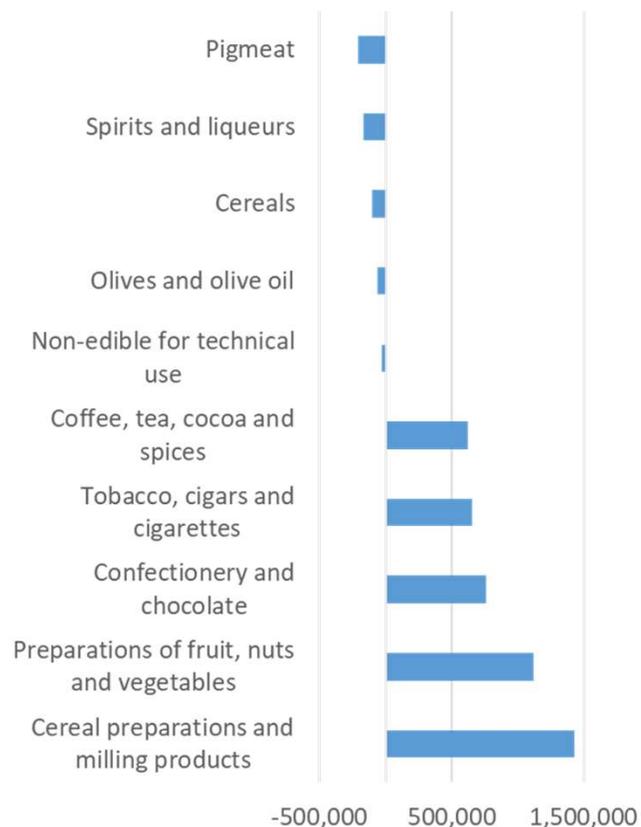
EU27: Trade of Agri-food products (million EUR)



Source: Comext

Evolution of exports by agri-food category

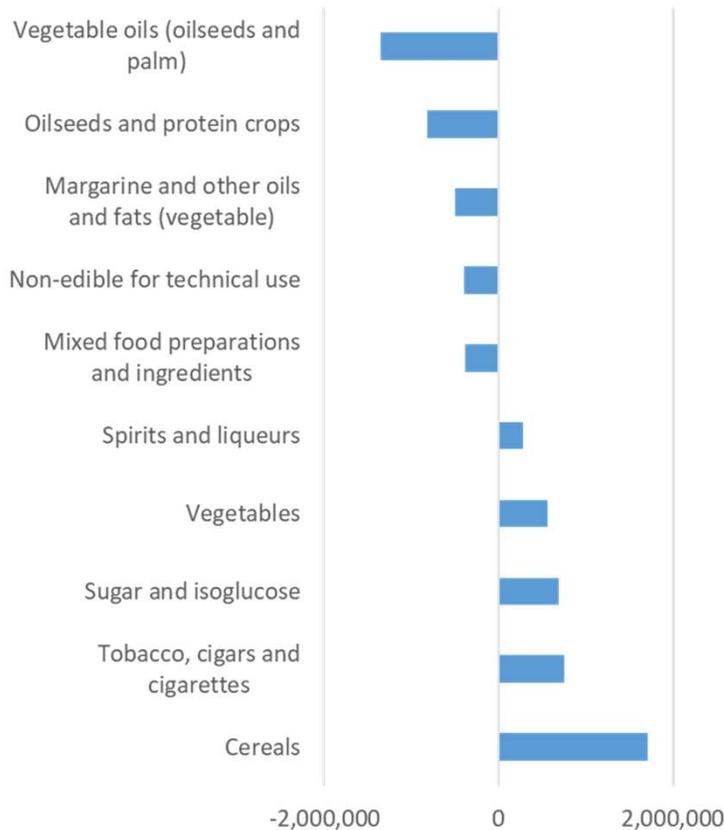
Main evolutions of exports in value, Jan-Jun 2022/2023 (in kEUR)



- Increase in exported value, but decrease in volumes for mosts products
- Exception is for exports of vegetable oils, oilseeds and cereals, who increased in volume, while prices decreased
- Reduction of exports of pigmeat and spirits and liqueurs

Evolution of imports by agri-food category

Main evolutions of imports in value, Jan-Jun
2022/2023 (in kEUR)

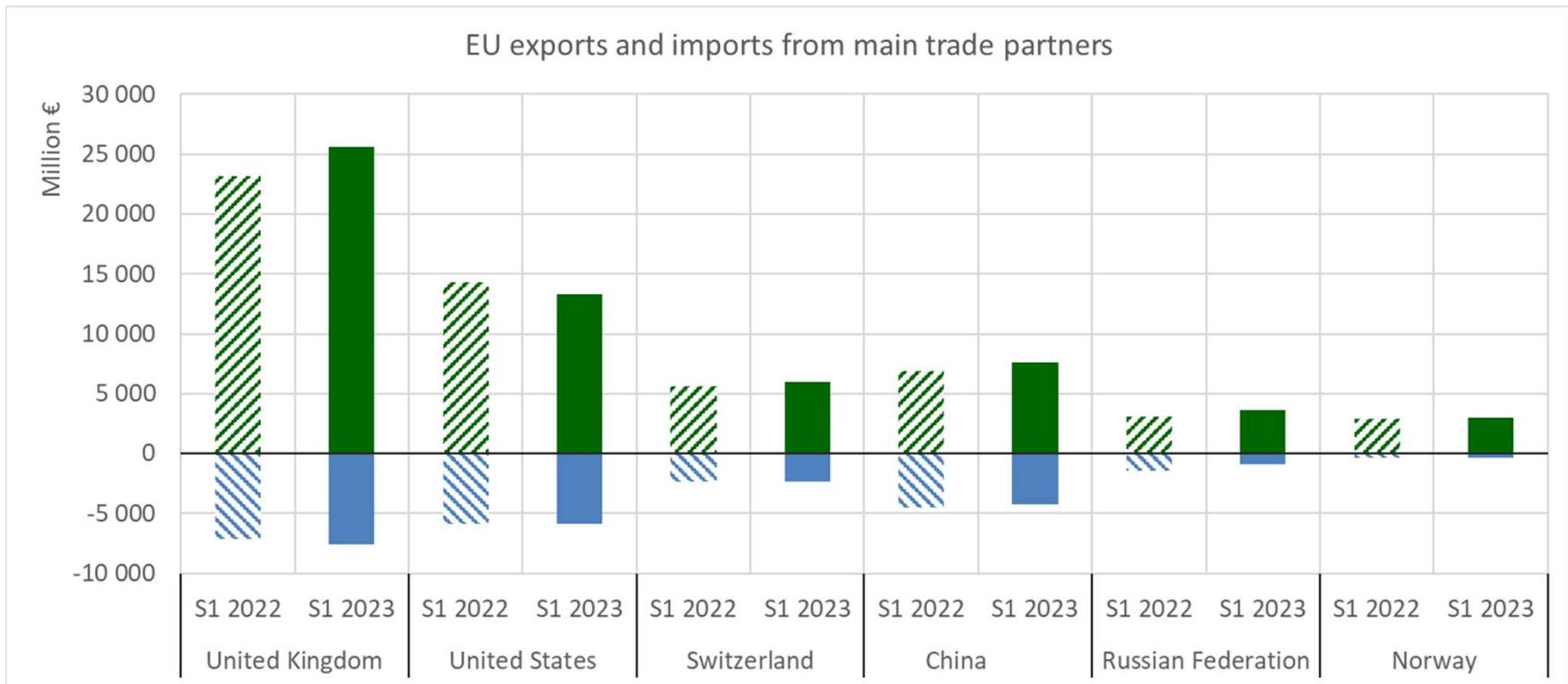


- Decrease of imports of vegetable oils and oilseeds both in value and in volume
- Cereal imports increased by around 40% in volume and in value
- Imports of sugar doubled in volume, a 150% increase in value due to higher prices

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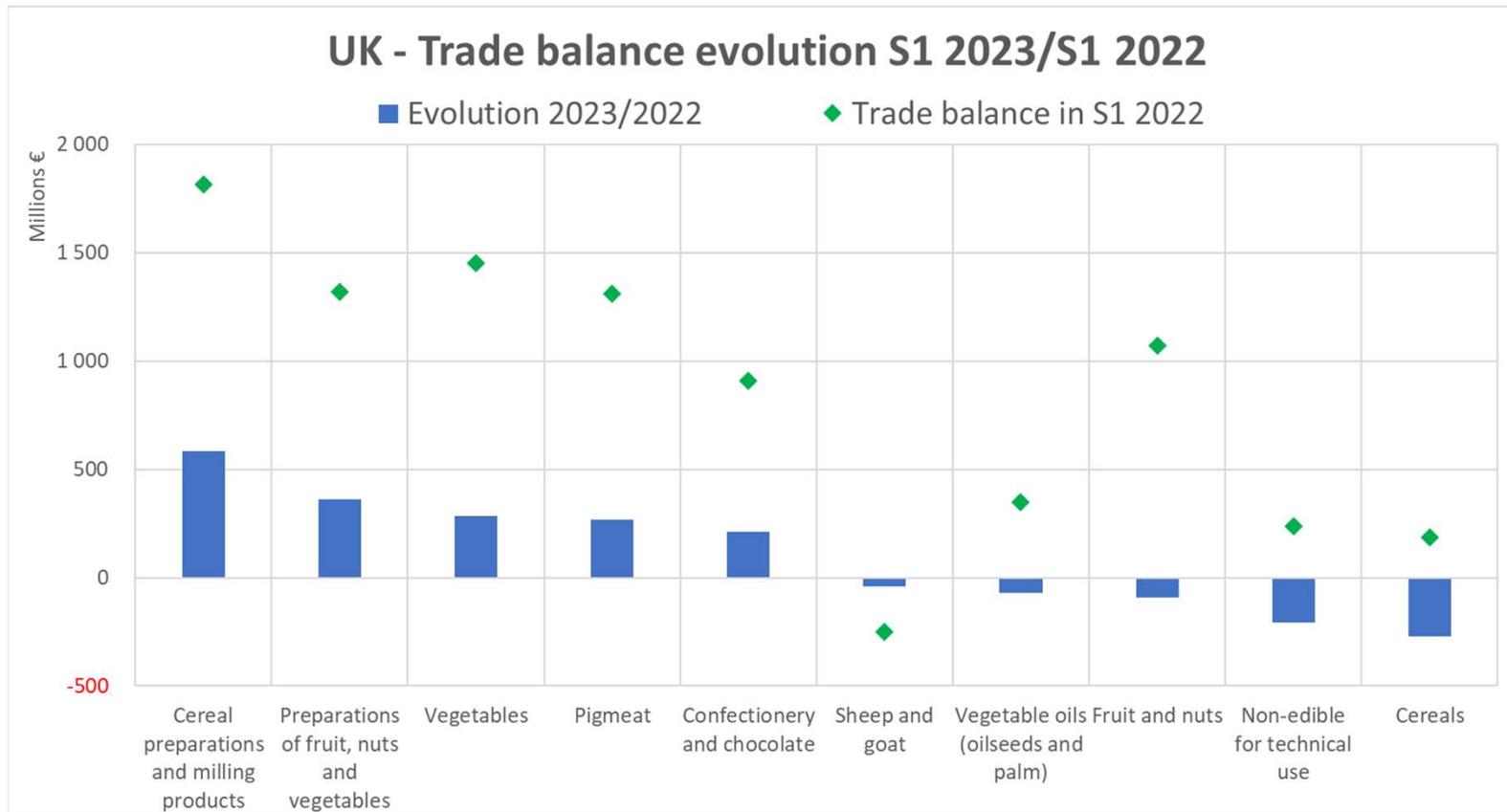
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EU trade balance improved in S1 2023



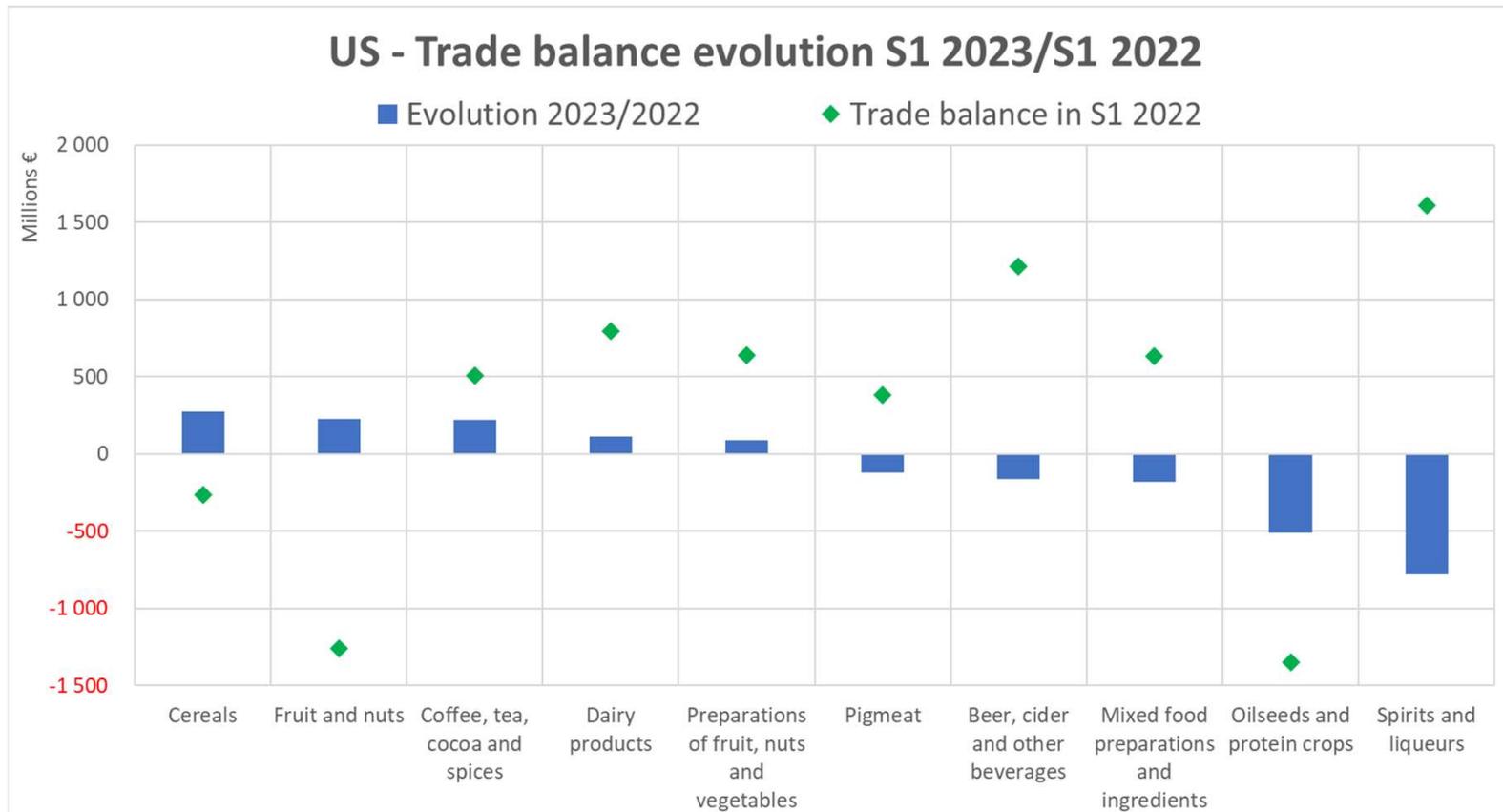
Source: COMEXT

Agri-food trade with the UK



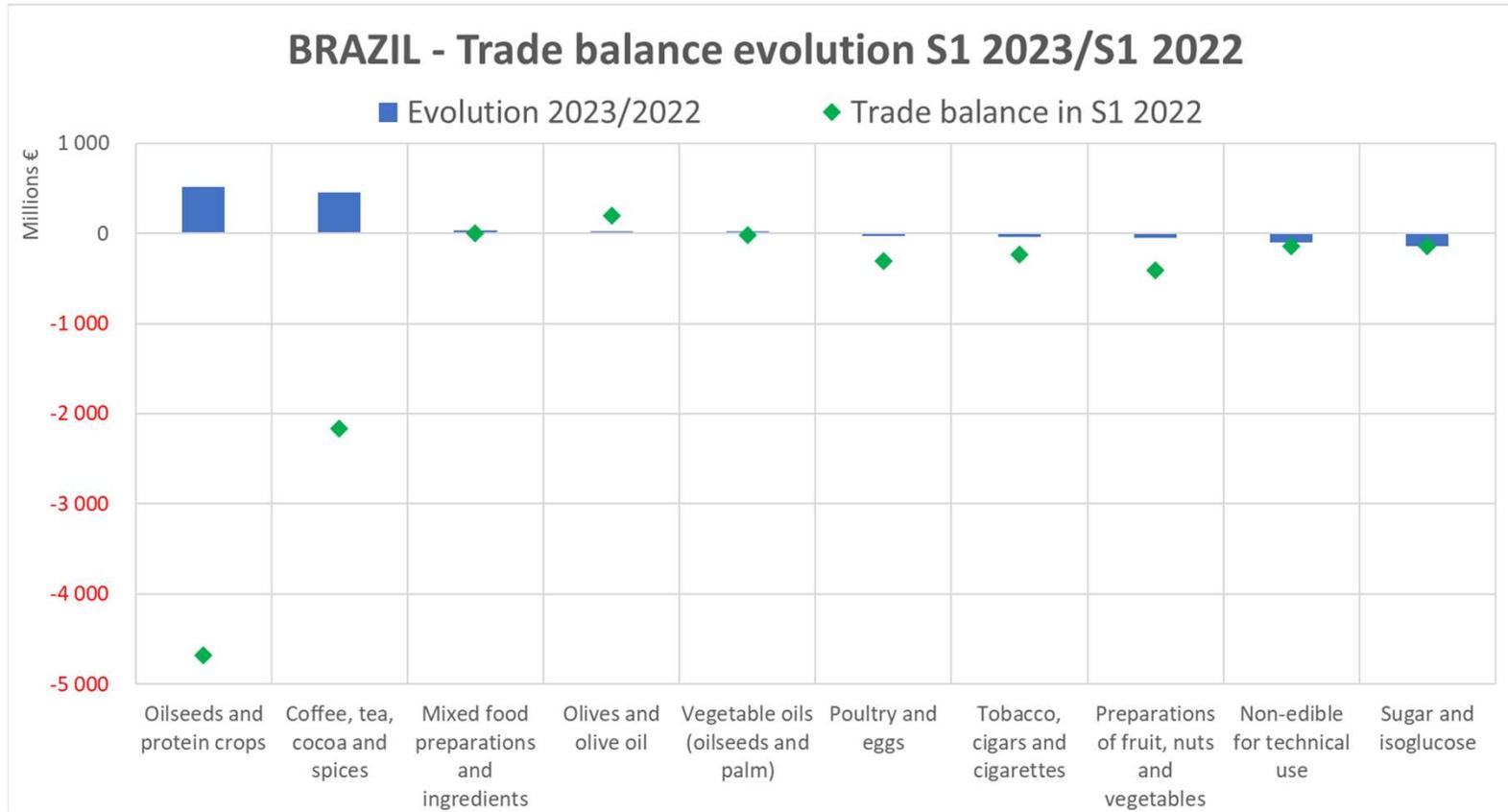
Source: COMEXT

Agri-food trade with the US



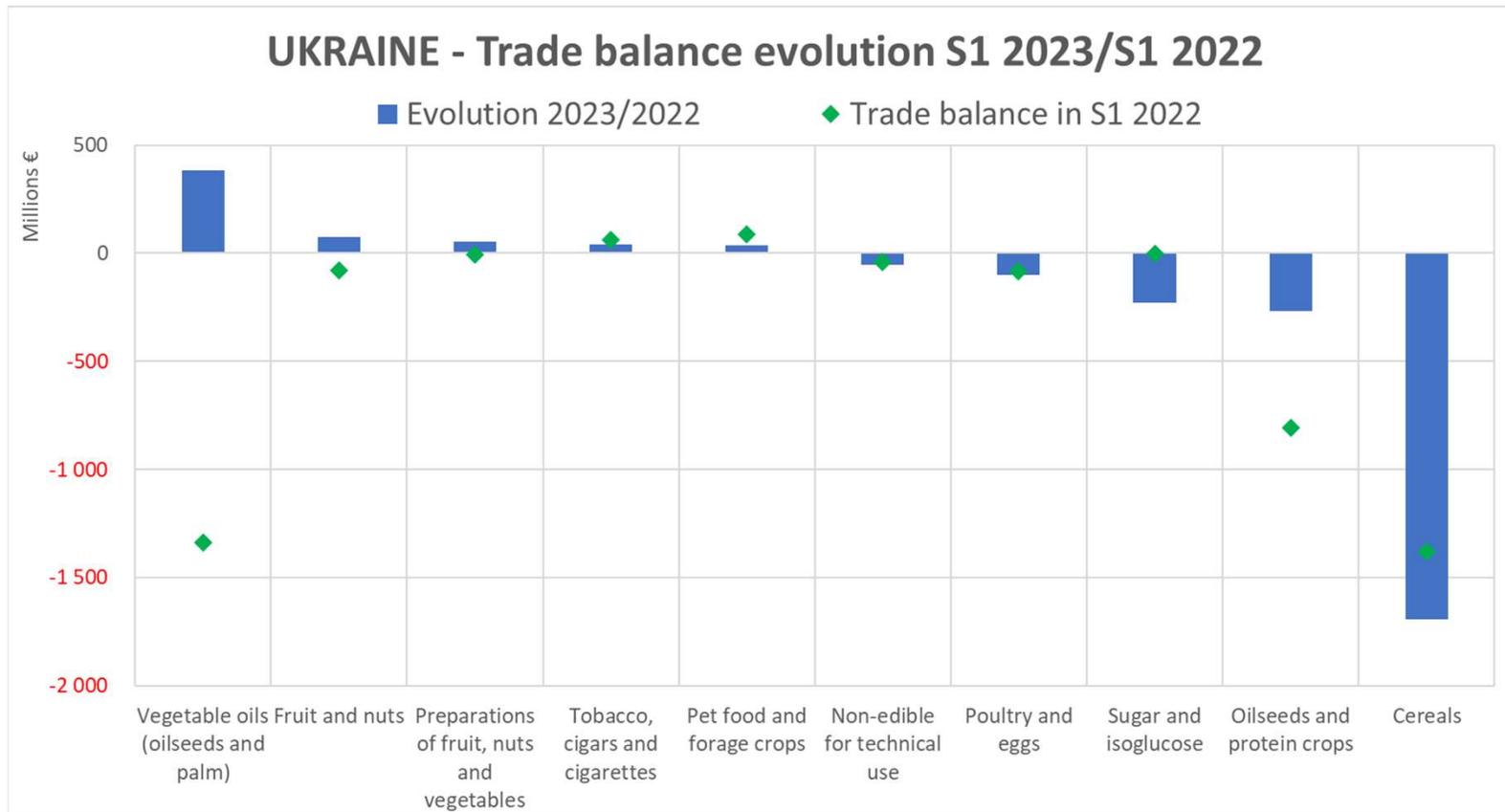
Source: COMEXT

Agri-food trade with Brazil



Source: COMEXT

Agri-food trade with Ukraine



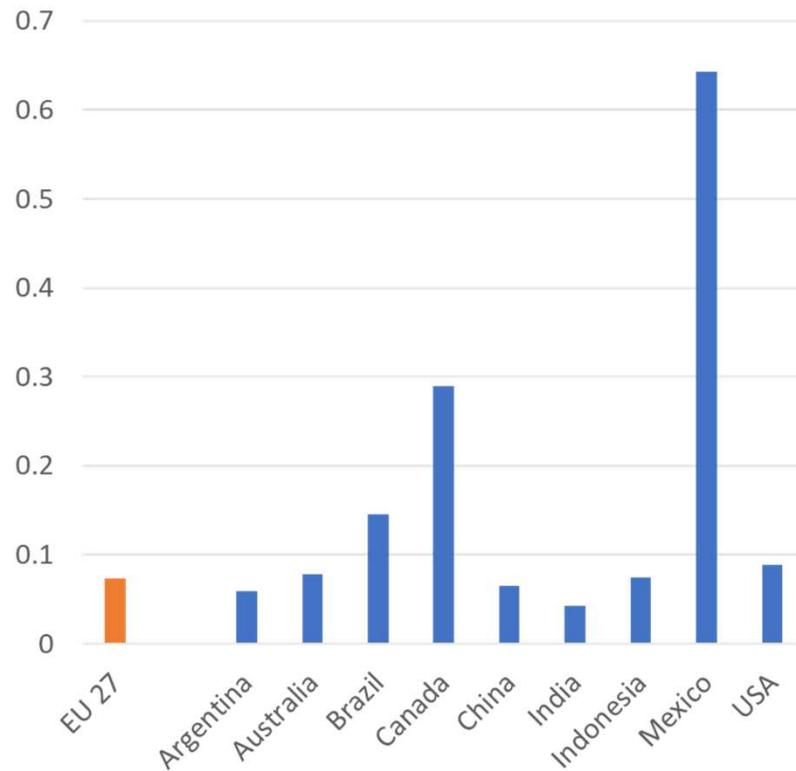
Source: COMEXT

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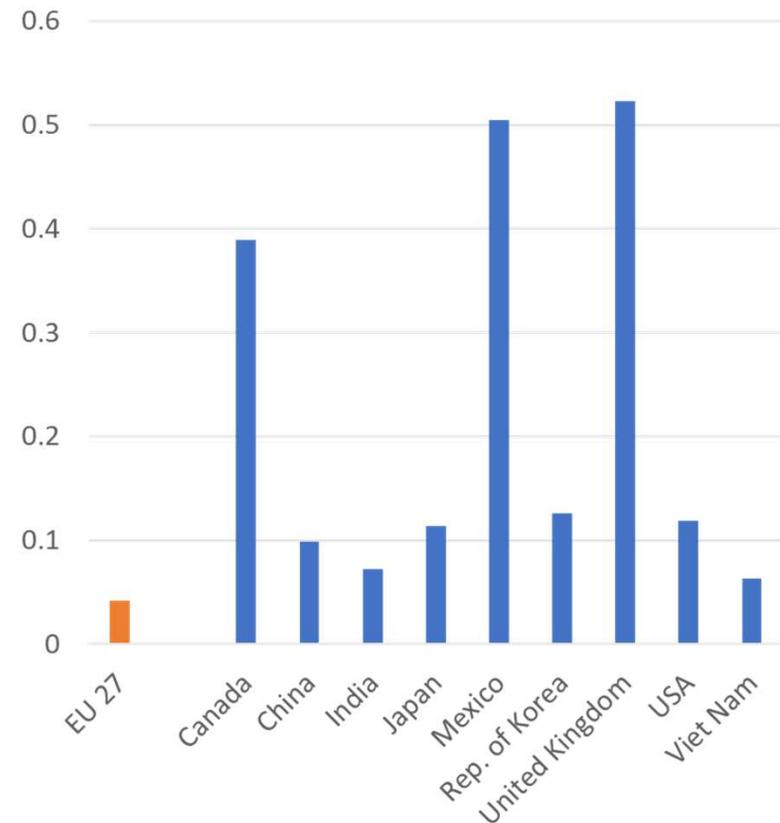
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Diversification of the EU's total agri-food trade compared to other major importers and exporters

Export diversification index of top 10 agri-food exporters in 2021

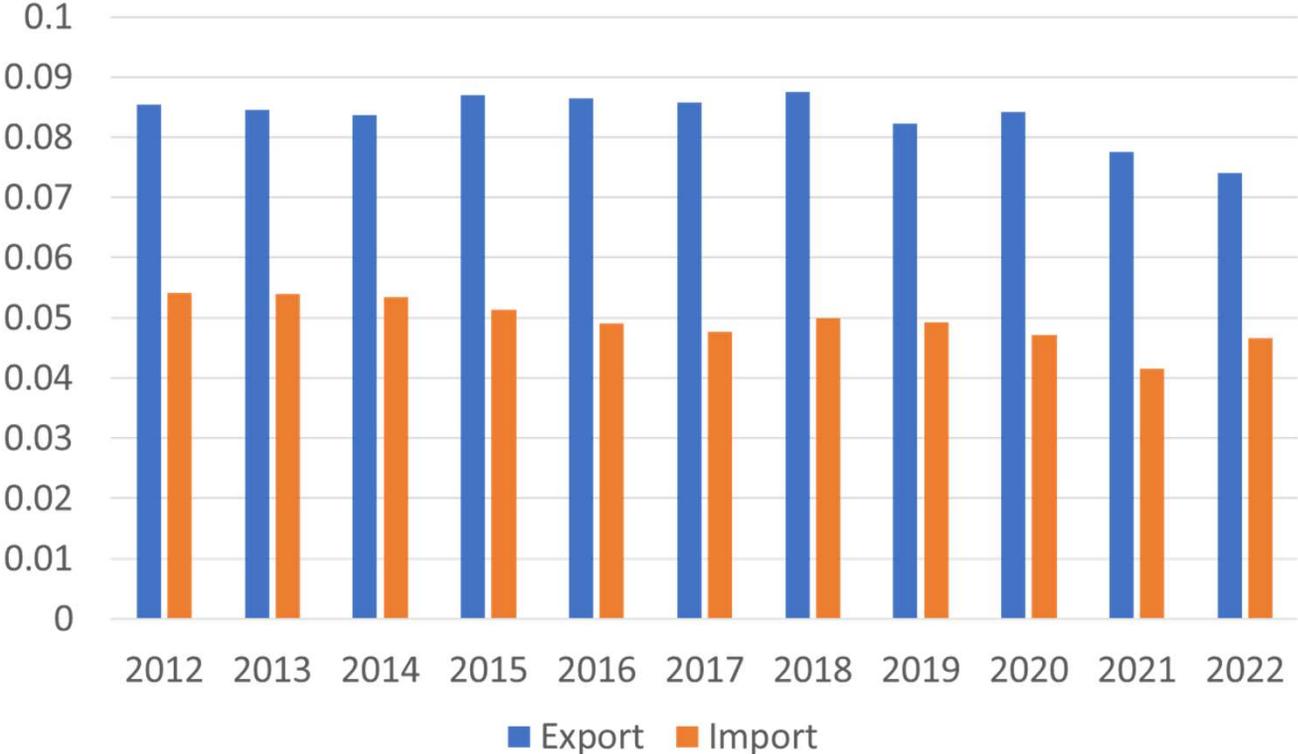


Import diversification index of top 10 agri-food importers in 2021



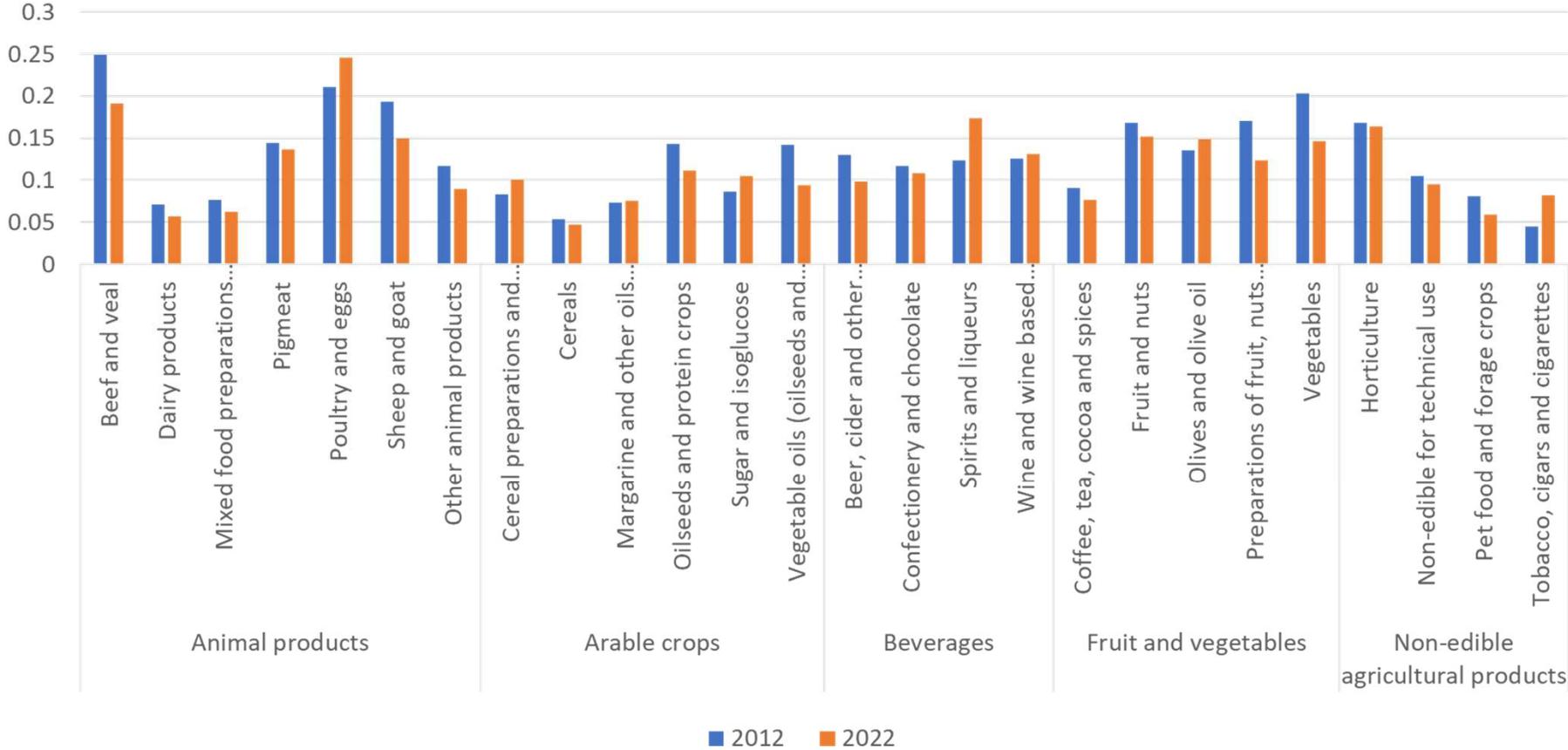
Evolution of EU's export and import diversification

Exports and Imports concentration index of total agri-food exports and imports of the EU



EU exports are well diversified across most product categories

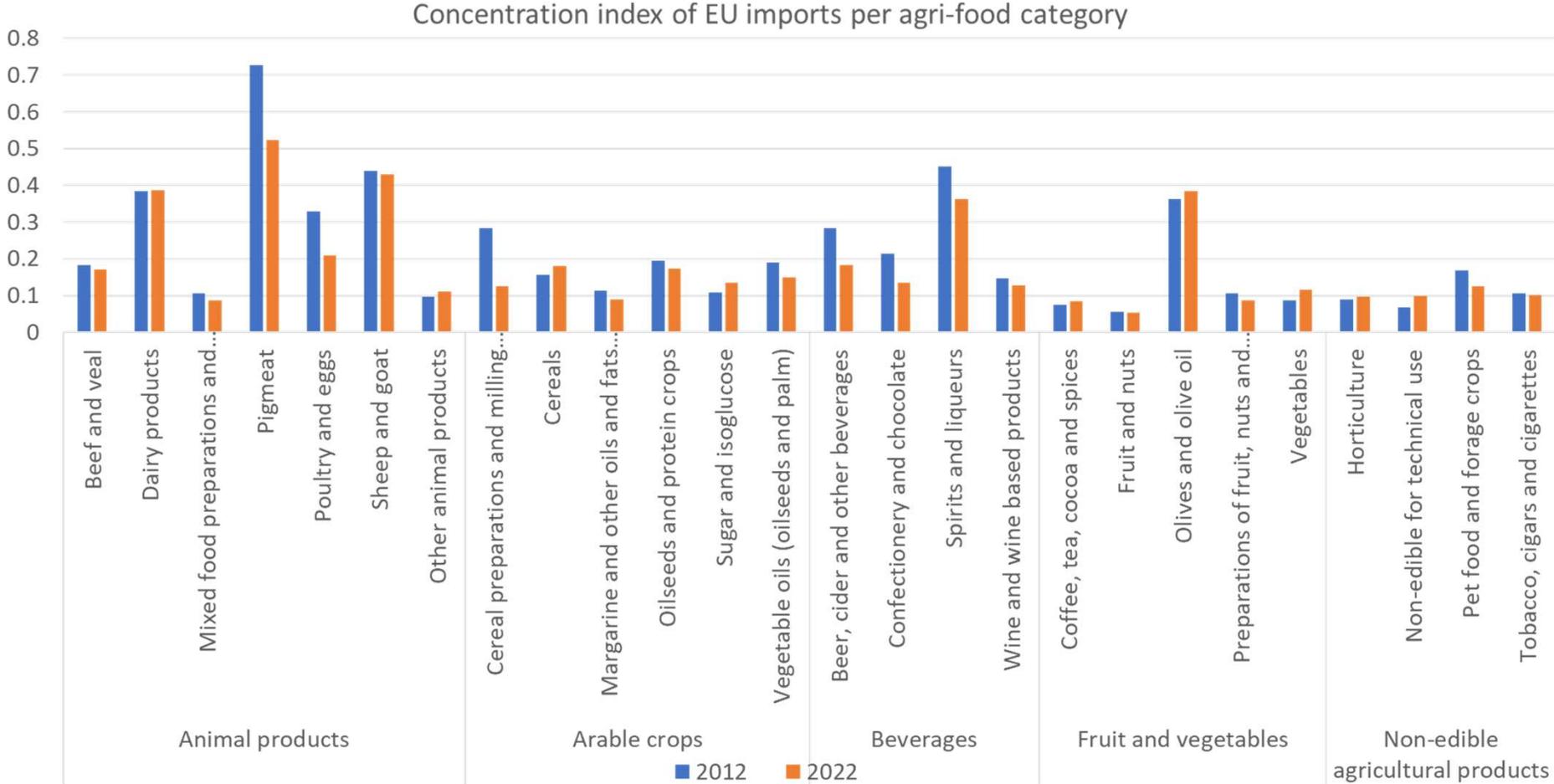
Concentration index of EU exports per agri-food category



Shares of the 3 top origins of EU exports for selected agri-food products

Category	2012		2022	
Beef and veal	United Kingdom	46%	United Kingdom	42%
	Türkiye	15%	Israel	9%
	Russian Federation	10%	Switzerland	5%
Cereal preparations and milling products	United Kingdom	25%	United Kingdom	24%
	United States	7%	China	14%
	China	6%	United States	12%
Dairy products	United Kingdom	21%	United Kingdom	17%
	Russian Federation	10%	China	9%
	United States	7%	United States	9%
Poultry and eggs	United Kingdom	44%	United Kingdom	49%
	Russian Federation	6%	Switzerland	5%
	Saudi Arabia	5%	Saudi Arabia	4%
Spirits and liqueurs	United States	29%	United States	39%
	Russian Federation	11%	China	9%
	Singapore	10%	United Kingdom	8%
Wine and wine based products	United States	23%	United States	28%
	United Kingdom	22%	United Kingdom	19%
	Switzerland	8%	Switzerland	7%

EU agri-food imports are concentrated for some categories of products



Shares of the 3 top origins of EU imports for selected agri-food products

Category	2012		2022	
Coffee, tea, cocoa and spices	Brazil	17%	Brazil	21%
	Côte d'Ivoire	12%	Côte d'Ivoire	13%
	Viet Nam	9%	Viet Nam	8%
Dairy products	United Kingdom	56%	United Kingdom	58%
	Switzerland	23%	Switzerland	21%
	New Zealand	10%	New Zealand	8%
Fruit and nuts	United States	12%	United States	12%
	Türkiye	10%	Türkiye	8%
	South Africa	7%	Peru	8%
Oilseeds and protein crops	Brazil	36%	Brazil	32%
	Argentina	19%	Argentina	15%
	Ukraine	9%	Ukraine	14%
Pigmeat	United Kingdom	85%	United Kingdom	72%
	Chile	5%	Switzerland	7%
	Switzerland	5%	Serbia	5%
Sheep and goat	New Zealand	54%	United Kingdom	47%
	United Kingdom	38%	New Zealand	46%
	Australia	3%	Australia	3%

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Country analysis

United Kingdom	2022 value (000EUR)	% in total EU	2022 volume (T)	% in total EU
EXPORTS from the EU	47 841 299			
Cereal preparations and milling products	5 521 400	24%	2 589 470	29%
Dairy products	3 467 794	17%	1 056 590	18%
Wine and wine based products	3 381 658	19%	768 464	22%
IMPORTS to the EU	15 263 261			
Spirits and liqueurs	2 505 061	57%	454 517	57%
Cereal preparations and milling products	1 495 094	31%	759 635	19%
Dairy products	1 473 538	58%	1 022 067	82%

United States	2022 value (000EUR)	% in total EU	2022 volume (T)	% in total EU
EXPORTS from the EU	28 983 270			
Wine and wine based products	5 041 821	28%	770 482	22%
Spirits and liqueurs	3 767 160	39%	365 886	26%
Beer, cider and other beverages	2 357 346	22%	2 015 869	16%
IMPORTS to the EU	12 249 635			
Oilseeds and protein crops	3 280 160	13%	5 354 973	12%
Fruit and nuts	2 728 374	12%	560 133	4%
Non-edible for technical use	1 034 688	9%	505 446	6%

EU agri-food trade with the UK is **generally well diversified** with a wide range of products both exported and imported.

EU agri-food trade with the US is **moderately diversified** with a range of products exported (beverages mainly) and a certain number of product categories imported.

Country analysis

Brazil	2022 value (000EUR)	% in total EU	2022 volume (T)	% in total EU
EXPORTS from the EU	2 351 707			
Olives and olive oil	435 359	9%	102 112	7%
Preparations of fruit, nuts and vegetables	215 887	2%	210 759	3%
Wine and wine based products	171 015	1%	49 700	1%
IMPORTS to the EU	20 172 298			
Oilseeds and protein crops	8 191 608	32%	15 139 958	34%
Coffee, tea, cocoa and spices	4 530 954	21%	1 097 183	18%
Cereals	2 322 733	18%	7 773 440	21%

EU agri-food trade with Brazil is **well diversified on the export side but much less on the import side** with some categories taking the lion share of the trade flows.

China	2022 value (000EUR)	% in total EU	2022 volume (T)	% in total EU
EXPORTS from the EU	15 793 764			
Pigmeat	3 426 745	25%	1 501 966	30%
Cereal preparations and milling products	3 317 611	14%	412 414	5%
Dairy products	1 923 182	9%	862 240	15%
IMPORTS to the EU	9 793 274			
Non-edible for technical use	1 808 247	16%	1 184 977	14%
Other animal products	1 576 853	26%	186 804	12%
Mixed food preparations and ingredients	1 016 017	15%	167 620	10%

EU agri-food trade with China is **moderately diversified** with key exported commodities, which represent respectively fifth of total EU agri-food exports to China.

Key results - Countries

- Both from total trade value and market share, **the UK** is a central trade partner for the EU
- The EU relies slightly more on the **US** when it comes to export flows compared to imports.
- EU agri-food trade with **China** is moderately diversified
Key exported commodities (pigmeat, cereal preparations and milling products) that represent respectively fifth of total EU agri-food exports to China
- **Brazil** is a key trade partner for EU imports
Brazil does not show high market shares when it comes to EU exports
- EU agri-food exports to **Ukraine** are well diversified
A wide range of products exported but EU imports are less diversified

Conclusions

- EU total agri-food trade is well diversified overall, with numerous trade partners.
- Since 2012, EU agri-food trade showed a slight trend towards a greater diversification of its trade partners for exports and imports.
- The EU has the most diversified total agri-food imports among the major agri-food global powerhouses and one of the most diversified exports.
- For some products, some partner countries represent a large share of EU exports or imports and these dependencies could lead to market instability in case trade flows are interrupted.
- The size of the EU, as a major agri-food importer and exporter, enables the EU to have balanced trade relations with its partners, who also rely on the EU for their own trade.

❖ QUESTIONS?

- a. Click on RAISE HAND (**YELLOW** = you have indicated your wish to take the floor)
- b. Wait until we give you the floor (**BLUE** = microphone is open but muted)
- c. Click on SPEAK to start speaking (**RED** = microphone is active and you can speak)
- d. Click on SPEAK again to mute after you have finished (**BLUE** = microphone is muted)

