



# MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS IN OCTOBER 2022

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## Note to the reader

The latest available consolidated trade data at EU level cover market developments until October 2022. 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).

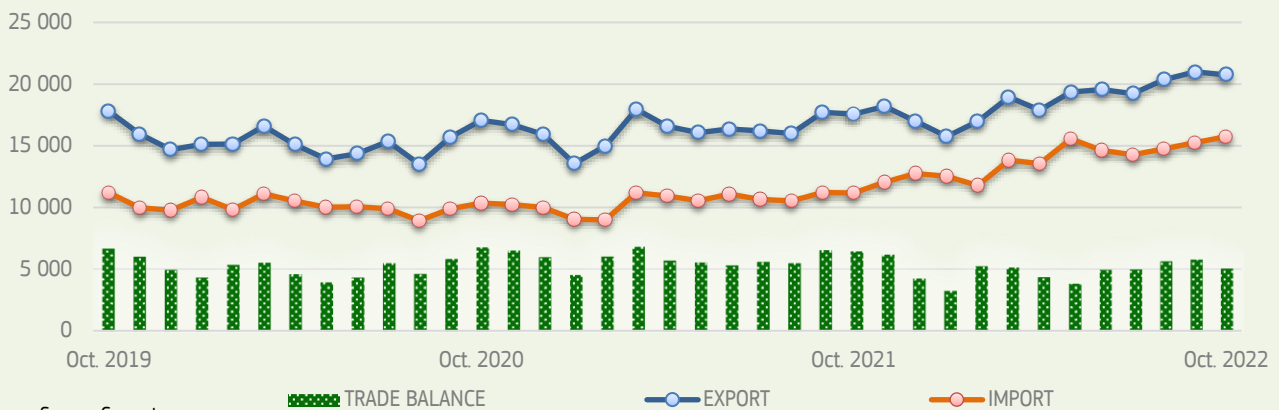
# HIGHLIGHTS: EU AGRI-FOOD IMPORTS INCREASE IN OCTOBER 2022 WEIGHED ON TRADE BALANCE

EU **imports** of agriculture and food products continued to increase for three months in a row, and reached **EUR 15.7 billion** (a 3% increase compared to the previous month). EU import value grew in October 2022 due to price increases, chiefly for soya meals, rapeseed, wheat and sunflower oil.

EU agri-food **exports** slightly decreased in October 2022, to reach **EUR 20.7 billion**, while still being the second highest point in 2022. The decrease of EU exports is mainly due to a drop in exports of spirits and liqueurs as well as for cheese and curd. While exported volumes of cheese and curd declined month-to-month, both volumes and prices dropped for the spirits and liqueurs exports. On the other hand, we observed an increase in exports of cereal preparations and wine.

In total, EU agri-food trade reached again a record value. The monthly trade flows reached their highest point for 2022, at EUR 36.5 billion. The **EU agri-food trade balance** declined month-to-month, to reach **EUR 5.0 billion**, a 13% drop compared to the previous month.

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



Source: Comext



# EU AGRI-FOOD EXPORTS

## EU EXPORTS TO CHINA PARTIALLY COMPENSATED LOSSES WITH US AND UK

EU agri-food exports decreased by 1.2% month-to-month, in value terms. For the two main trade partners, exports declined, i.e. for the United States (-5% compared to September, -EUR 137.6 million) and for the United Kingdom (-2%, -EUR 68.8 million). Exports to China increased month-to-month (+3%, +EUR 46 million) and exports to Switzerland remained stable.

EU top export products to **China** in October were cereal preparations (20% of total EU agri-food exports to China), frozen pigmeat (16%), pig offal (8%), spirits and liqueurs (7%) and wine (5%). After a stable and low first half of 2022, pig exports to China started to increase. Frozen pigmeat exports increased by 101% from July to October 2022, to reach EUR 248 million (a value not seen since June 2021) and offal exports rose by 18%.

### Trade developments in January-October 2022

EU exports to **the US** in the first ten months of 2022 reached EUR 24.4 billion. This is 29% higher than the three-year average for the same period. The rise has been coming from an increase in unit values of a

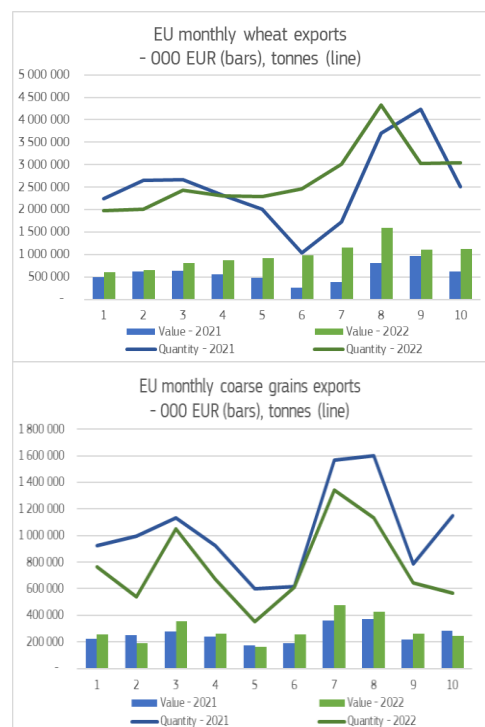
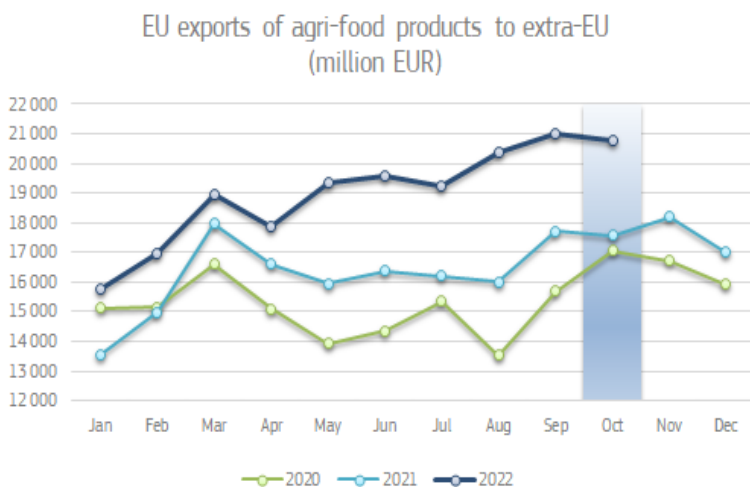
wide range of products. This was particularly the case for wine as well as for spirits and liqueurs, for which exported volumes decreased in 2022 compared to 2021, while export values increased.

EU exports to **the UK** have reached EUR 39.5 billion from January to October 2022 (+15% compared to 2021). For the most exported products to the UK, all unit price of EU exports increased compared to 2021 (mainly for poultry meat preparations and potatoes).

## HIGH EXPORT VALUES FOR CEREALS AND CEREAL PRODUCTS UNTIL OCTOBER 2022

Cereals exports from January to October reached a value of EUR 14.4 billion (+46% compared to the same period in 2021). Despite the steep increase in exported volumes during the summer (see graphs below), the total exports of cereals in 2022 was 4% lower compared to the same period in 2021. Cereals preparations exports were up by 22% (in value terms) in Jan-Oct 2022 compared to 2021.

In 2022, monthly wheat exports increased drastically over the summer (as shown below in the graph) both in terms of quantity exported and value. However, the average price of exported wheat for the EU declined over the period June-September (-9%).



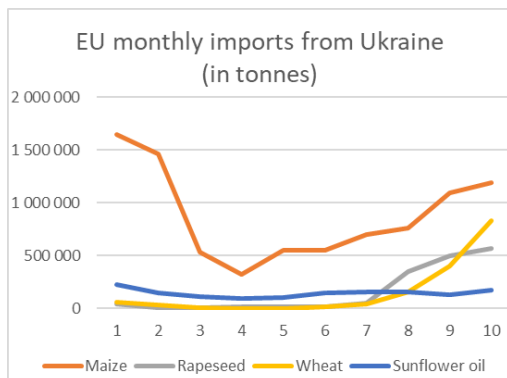
# EU AGRI-FOOD IMPORTS

## IMPORTS SLIGHTLY INCREASED IN OCTOBER 2022

EU imports in October 2022 reached EUR 15.7 billion. It is a 3% increase and reaching a new record level.

EU agri-food imports from **Brazil** declined in October 2022 (-17% compared to Sept.). Imports from **Ukraine** continued to increase (+25% compared to Sept.). Brazil and Ukraine are the top two countries for EU agri-food imports and the value of imports from these countries are 20% higher compared to the United Kingdom (which is the 3<sup>rd</sup> most important).

Imports from **Ukraine** started to increase in May, and attained EUR 9.5 billion for the period Jan-Oct 2022. The first top products (maize, sunflower oil, sunflower seeds and rapeseed) represented 70%. Highest increases in October were recorded for wheat (+EUR 131 million month-to-month), rapeseed (+EUR 66 million) and for sunflower oil (+EUR 58 million).

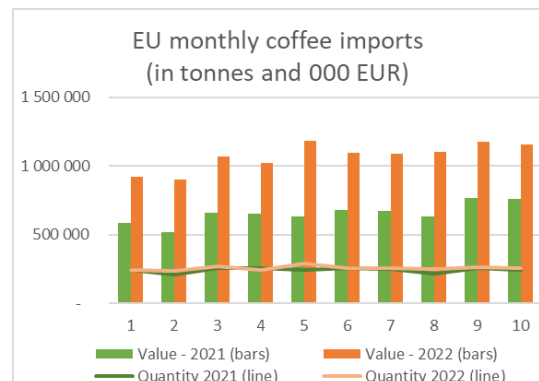


## LOWER EU PALM OIL IMPORTS IN JANUARY-OCTOBER 2022

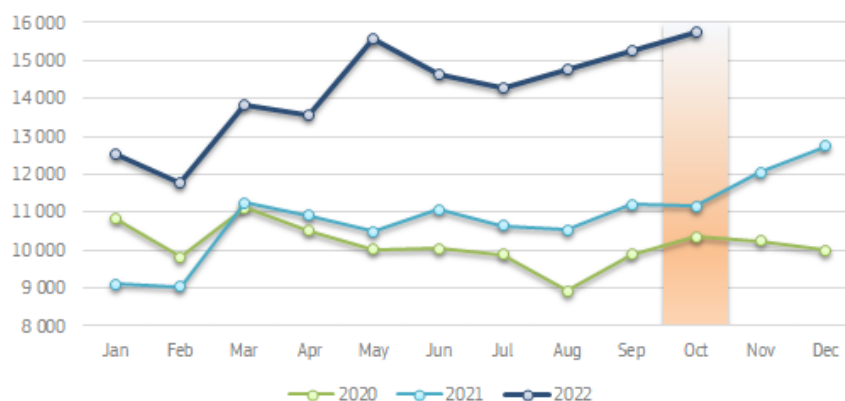
**Palm oil** imports retreated somewhat in October compared to September to reach in total 4.1 million tonnes for the period January-October 2022. This is 16% less compared to the same period in 2021. In the same time, the import value increased by 27%, to reach EUR 5.4 billion.

EU monthly imports of **maize** also dropped in October, after a peak in September (-19%). Compared to last year, the total EU imports from January to October reached 18.6 million tonnes (+66% compared to the same period in 2021).

Over the period January-October 2022, EU **coffee** imports reached EUR 10.7 billion. It is a 63% increase compared to last year in the same period. At the same time, the overall volumes imported increased very slightly, by 6% (see below).



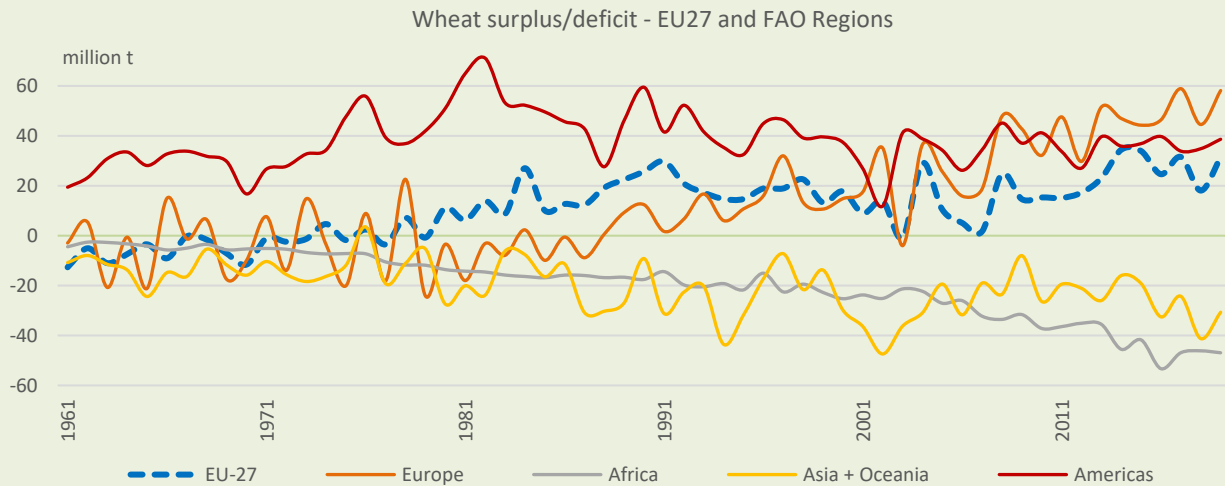
## EU imports of agri-food products from extra-EU (million EUR)



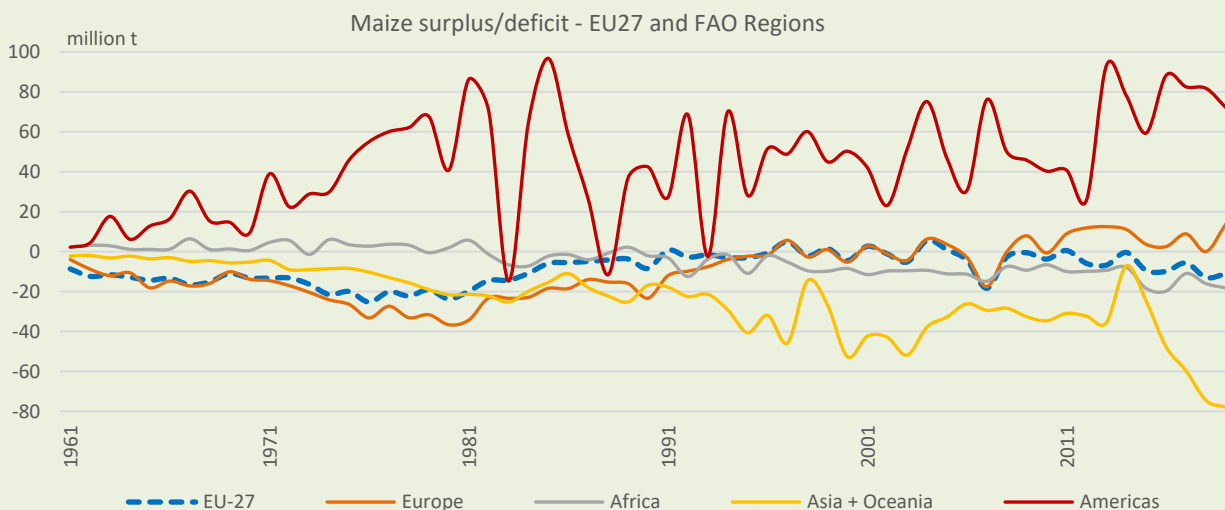
## FOCUS

### Wheat and maize surplus and deficit across world regions (1961 – 2019)

Global food security was recently compromised further by the effects of the COVID-19 pandemic and the Russian invasion of Ukraine, jeopardising the livelihoods of million people. International organisations have called to support efficient production and trade as part of the response to the global food security crisis. This section presents historical evolutions in consumption and production trends across FAO regions namely Europe and Central Asia<sup>1</sup>, Africa, Asia-Oceania and the Americas.



For wheat, there is a remarkable deficit in Asia, driven by an increase in consumption over the whole period, mainly driven by China and India, which is not matched by an increase in production. Similarly, in Africa, per capita consumption grew until the 2000s and then plateaus but, with a growing population, increased urbanisation and stagnating production, the deficit has widened. In parallel, other regions steadily increased their net exporting status.



As regards maize, the consumption in Europe slightly increased, but more slowly than production, which allowed a reduction of the deficit. Starting in 2010, the deficit of maize in the EU-27 was slowly reinstated. Asia's consumption grew steadily and was not matched by an equivalent production increase, resulting in large imports during the last decade. The surplus in the Americas has been driven by the USA until the 2000s (in parallel of an increase in consumption) and then by Brazil and Argentina (where at the same time consumption increased markedly since the mid-1990s).

1. FAO Europe region includes 54 countries from continental Europe, including Russia and the Balkan peninsula.

**TABLE 1**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Oct21	Jan22-Oct22	Difference	
<b>TOTAL AGRIFOOD</b>	<b>184 462</b>	<b>198 141</b>	<b>100%</b>	<b>162 977</b>	<b>189 797</b>	<b>26 820</b>	<b>16%</b>
United Kingdom	41 962	41 946	21%	34 318	39 533	5 215	15%
United States	21 447	24 518	12%	20 301	24 428	4 127	20%
Morocco	2 165	2 368	1%	1 877	3 344	1 467	78%
Switzerland	9 030	9 858	5%	8 080	9 212	1 132	14%
Saudi Arabia	4 305	3 631	2%	3 025	3 886	861	28%
Ukraine	2 841	3 109	2%	2 485	2 382	- 102	-4%
Cambodia	252	419	0%	390	250	- 140	-36%
Hong Kong	2 540	2 159	1%	1 804	1 508	- 296	-16%
Russian Federation	6 840	7 341	4%	5 952	5 615	- 337	-6%
China	17 684	17 148	9%	14 633	12 701	-1 932	-13%
Other countries	75 396	85 643	43%	70 114	86 938	16 824	24%

**TABLE 2**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Oct21	Jan22-Oct22	Difference	
<b>TOTAL AGRIFOOD</b>	<b>184 462</b>	<b>198 141</b>	<b>100%</b>	<b>162 977</b>	<b>189 797</b>	<b>26 820</b>	<b>16%</b>
United Kingdom	41 962	41 946	21%	34 318	39 533	5 215	15%
United States	21 447	24 518	12%	20 301	24 428	4 127	20%
China	17 684	17 148	9%	14 633	12 701	- 1 932	-13%
Switzerland	9 030	9 858	5%	8 080	9 212	1 132	14%
Japan	6 984	7 378	4%	6 093	6 862	769	13%
Russian Federation	6 840	7 341	4%	5 952	5 615	- 337	-6%
Norway	4 844	5 412	3%	4 489	4 958	469	10%
Canada	3 637	4 049	2%	3 372	4 041	669	20%
Saudi Arabia	4 305	3 631	2%	3 025	3 886	861	28%
Korea, Republic of	3 029	3 940	2%	3 217	3 852	636	20%
Morocco	2 165	2 368	1%	1 877	3 344	1 467	78%
Türkiye	3 061	3 569	2%	2 808	3 270	462	16%
Australia	3 188	3 302	2%	2 716	3 205	490	18%
Algeria	2 989	2 948	1%	2 529	3 097	568	22%
United Arab Emirates	2 122	2 346	1%	1 877	2 671	793	42%
Other countries	51 176	58 386	29%	47 691	59 123	11 432	24%

**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-Oct21	Jan22-Oct22	Difference	
<b>TOTAL AGRIFOOD</b>	<b>184 462</b>	<b>198 141</b>	<b>100%</b>	<b>162 977</b>	<b>189 797</b>	<b>26 820</b>	<b>16%</b>
Cereals	11 413	11 993	6%	9 879	14 395	4 516	46%
Cereal preparations and milling products	18 777	18 814	9%	15 430	18 770	3 340	22%
Dairy products	15 988	16 990	9%	14 086	16 972	2 887	20%
Mixed food preparations and ingredients	11 208	12 263	6%	10 027	12 222	2 196	22%
Preparations of fruit, nuts and vegetables	8 059	8 415	4%	6 848	8 486	1 638	24%
Fruit and nuts	6 029	5 712	3%	4 563	4 807	244	5%
Sheep and goat	617	578	0%	504	587	83	17%
Sugar and isoglucose	555	596	0%	443	474	32	7%
Horticulture	3 868	4 643	2%	3 892	3 772	- 120	-3%
Pigmeat	15 110	14 527	7%	12 301	11 304	- 997	-8%
Other products	92 838	103 611	52%	85 004	98 008	13 003	15%

**TABLE 4**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Oct21	Jan22-Oct22	Difference	
<b>TOTAL AGRIFOOD</b>	<b>184 462</b>	<b>198 141</b>	<b>100%</b>	<b>162 977</b>	<b>189 797</b>	<b>26 820</b>	<b>16%</b>
Cereal preparations and milling products	18 777	18 814	9%	15 430	18 770	3 340	22%
Dairy products	15 988	16 990	9%	14 086	16 972	2 887	20%
Wine and wine based products	13 452	16 641	8%	13 788	15 250	1 463	11%
Cereals	11 413	11 993	6%	9 879	14 395	4 516	46%
Mixed food preparations and ingredients	11 208	12 263	6%	10 027	12 222	2 196	22%
Pigmeat	15 110	14 527	7%	12 301	11 304	- 997	-8%
Beer, cider and other beverages	9 712	10 002	5%	8 330	9 112	781	9%
Preparations of fruit, nuts and vegetables	8 059	8 415	4%	6 848	8 486	1 638	24%
Confectionery and chocolate	7 885	8 885	4%	7 202	8 386	1 184	16%
Spirits and liqueurs	6 820	8 413	4%	7 031	8 316	1 285	18%
Pet food and forage crops	6 505	7 361	4%	6 055	7 122	1 067	18%
Other animal products	6 509	7 531	4%	6 255	6 805	550	9%
Vegetables	7 361	7 408	4%	5 875	6 461	586	10%
Coffee, tea, cocoa and spices	5 934	6 180	3%	5 076	6 100	1 024	20%
Tobacco, cigars and cigarettes	5 606	5 504	3%	4 590	5 010	420	9%
Other products	34 123	37 214	19%	30 203	35 085	4 882	16%



**TABLE 5**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2020	2021	Share 2021	Jan21-Oct21	Jan22-Oct22		
<b>TOTAL AGRIFOOD</b>	<b>121 600</b>	<b>130 121</b>	<b>100%</b>	<b>105 320</b>	<b>141 878</b>	<b>36 558</b>	<b>35%</b>
Brazil	11 362	13 548	10%	11 455	17 034	5 580	49%
Ukraine	5 837	6 927	5%	5 262	9 550	4 288	81%
China	5 128	6 109	5%	4 830	8 095	3 266	68%
United Kingdom	15 685	11 874	9%	9 418	12 446	3 029	32%
United States	9 587	9 254	7%	7 314	10 177	2 863	39%
Guyana	85	87	0%	75	67	- 8	-11%
Panama	285	191	0%	157	148	- 10	-6%
Iran, Islamic Republic of	355	400	0%	324	302	- 22	-7%
Ghana	1 240	1 337	1%	1 124	1 080	- 44	-4%
Nigeria	477	650	0%	572	429	- 143	-25%
Other countries	71 559	79 744	61%	64 790	82 549	17 759	27%

**TABLE 6**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2020	2021	Share 2021	Jan21-Oct21	Jan22-Oct22		
<b>TOTAL AGRIFOOD</b>	<b>121 600</b>	<b>130 121</b>	<b>100%</b>	<b>105 320</b>	<b>141 878</b>	<b>36 558</b>	<b>35%</b>
Brazil	11 362	13 548	10%	11 455	17 034	5 580	49%
United Kingdom	15 685	11 874	9%	9 418	12 446	3 029	32%
United States	9 587	9 254	7%	7 314	10 177	2 863	39%
Ukraine	5 837	6 927	5%	5 262	9 550	4 288	81%
China	5 128	6 109	5%	4 830	8 095	3 266	68%
Argentina	4 378	5 171	4%	4 263	5 696	1 433	34%
Indonesia	4 334	5 649	4%	4 482	5 468	986	22%
Türkiye	4 652	5 033	4%	4 021	4 526	505	13%
Switzerland	4 596	4 523	3%	3 664	3 980	317	9%
Australia	1 155	1 901	1%	1 593	3 342	1 749	110%
India	2 364	2 921	2%	2 457	3 144	687	28%
Côte d'Ivoire	3 302	3 259	3%	2 802	2 995	193	7%
Viet Nam	2 168	2 222	2%	1 812	2 908	1 096	60%
Malaysia	2 249	2 656	2%	2 094	2 883	789	38%
Peru	2 425	2 711	2%	2 102	2 739	637	30%
Other countries	42 377	46 363	36%	37 752	46 894	9 142	24%

**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-Oct21	Jan22-Oct22	Difference	
<b>TOTAL AGRIFOOD</b>	<b>121 600</b>	<b>130 121</b>	<b>100%</b>	<b>105 320</b>	<b>141 878</b>	<b>36 558</b>	<b>35%</b>
Oilseeds and protein crops	15 115	18 250	14%	14 854	21 342	6 488	44%
Cereals	5 771	6 188	5%	4 839	9 679	4 840	100%
Coffee, tea, cocoa and spices	15 944	16 946	13%	13 840	18 378	4 538	33%
Non-edible for technical use	5 841	7 489	6%	5 863	9 936	4 073	69%
Vegetable oils (oilseeds and palm)	6 713	8 238	6%	6 523	9 239	2 717	42%
Sugar and isoglucose	831	863	1%	660	889	229	35%
Horticulture	1 688	1 928	1%	1 608	1 796	188	12%
Wine and wine based products	1 775	1 664	1%	1 344	1 530	186	14%
Olives and olive oil	751	636	0%	497	594	97	20%
Pigmeat	415	293	0%	239	306	67	28%
Other products	66 756	67 625	52%	55 054	68 189	13 135	24%

**TABLE 8**

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Oct21	Jan22-Oct22	Difference	
<b>TOTAL AGRIFOOD</b>	<b>121 600</b>	<b>130 121</b>	<b>100%</b>	<b>105 320</b>	<b>141 878</b>	<b>36 558</b>	<b>35%</b>
Oilseeds and protein crops	15 115	18 250	14%	14 854	21 342	6 488	44%
Fruit and nuts	21 051	20 720	16%	17 234	18 672	1 438	8%
Coffee, tea, cocoa and spices	15 944	16 946	13%	13 840	18 378	4 538	33%
Non-edible for technical use	5 841	7 489	6%	5 863	9 936	4 073	69%
Cereals	5 771	6 188	5%	4 839	9 679	4 840	100%
Vegetable oils (oilseeds and palm)	6 713	8 238	6%	6 523	9 239	2 717	42%
Mixed food preparations and ingredients	5 182	5 590	4%	4 550	5 658	1 108	24%
Preparations of fruit, nuts and vegetables	5 412	5 419	4%	4 448	5 337	888	20%
Other animal products	4 660	4 668	4%	3 685	4 990	1 305	35%
Margarine and other oils and fats (vegetable)	3 023	3 931	3%	3 125	4 354	1 229	39%
Vegetables	4 146	4 283	3%	3 440	4 167	727	21%
Cereal preparations and milling products	3 759	3 856	3%	3 108	4 018	910	29%
Spirits and liqueurs	3 060	3 301	3%	2 582	3 536	955	37%
Pet food and forage crops	2 705	2 761	2%	2 225	2 922	697	31%
Tobacco, cigars and cigarettes	2 468	2 306	2%	1 896	2 846	950	50%
Other products	16 751	16 175	12%	13 108	16 803	3 695	28%

TABLE 9

AGRI-FOOD TRADE BALANCE (MILLION EUR)

TRADE BALANCE			
PRODUCT/PERIOD	Exports Jan22-Oct22	Imports Jan22-Oct22	Trade balance Jan22-Oct22
	million EUR		
<b>TOTAL AGRIFOOD</b>	<b>189 797</b>	<b>141 878</b>	<b>47 920</b>
Dairy products	16 972	2 084	14 888
Cereal preparations and milling products	18 770	4 018	14 752
Wine and wine based products	15 250	1 530	13 720
Pigmeat	11 304	306	10 999
Beer, cider and other beverages	9 112	1 967	7 145
Mixed food preparations and ingredients	12 222	5 658	6 564
Confectionery and chocolate	8 386	2 253	6 133
Spirits and liqueurs	8 316	3 536	4 780
Cereals	14 395	9 679	4 716
Pet food and forage crops	7 122	2 922	4 200
Olives and olive oil	4 230	594	3 636
Preparations of fruit, nuts and vegetables	8 486	5 337	3 149
Poultry and eggs	4 846	1 923	2 923
Vegetables	6 461	4 167	2 294
Tobacco, cigars and cigarettes	5 010	2 846	2 165
Horticulture	3 772	1 796	1 976
Other animal products	6 805	4 990	1 815
Unspecified	1 729	134	1 595
Beef and veal	3 549	2 219	1 330
Sugar and isoglucose	474	889	- 414
Sheep and goat	587	1 093	- 506
Margarine and other oils and fats (vegetable)	1 931	4 354	-2 423
Vegetable oils (oilseeds and palm)	3 245	9 239	-5 995
Non-edible for technical use	3 846	9 936	-6 090
Coffee, tea, cocoa and spices	6 100	18 378	-12 278
Fruit and nuts	4 807	18 672	-13 865
Oilseeds and protein crops	2 068	21 342	-19 274
<i>Fish and fish products</i>	<i>6 076</i>	<i>26 300</i>	<i>-20 224</i>
<b>TOTAL AGRIFOOD AND FISH</b>	<b>195 873</b>	<b>168 177</b>	<b>27 696</b>



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