



EU AGRI–FOOD TRADE: *overview in 2021 and 2022*

Civil Dialogue Group « International aspects of agriculture »

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DG AGRI G.1

Contents

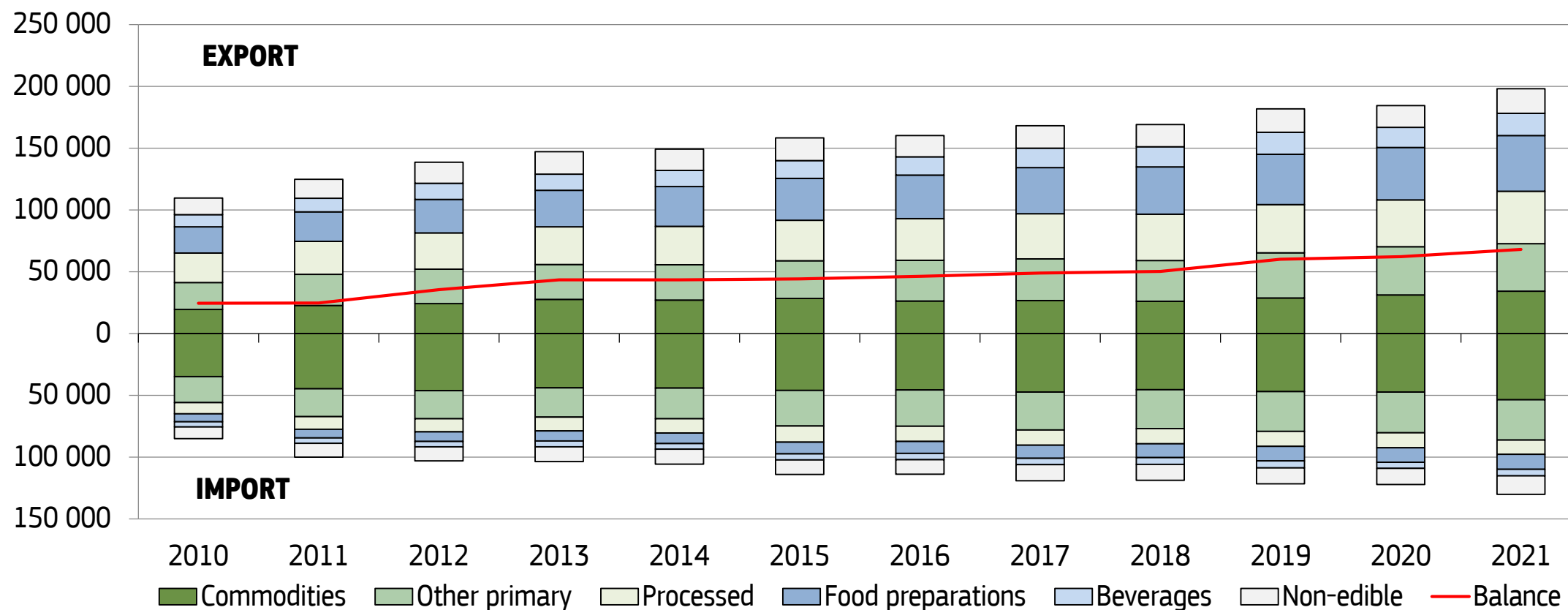
- 2021 sector/country-specific details
- Trade disruptions in early 2022
- Agri-food trade outlook



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Overall agri-food trade 2021: EU

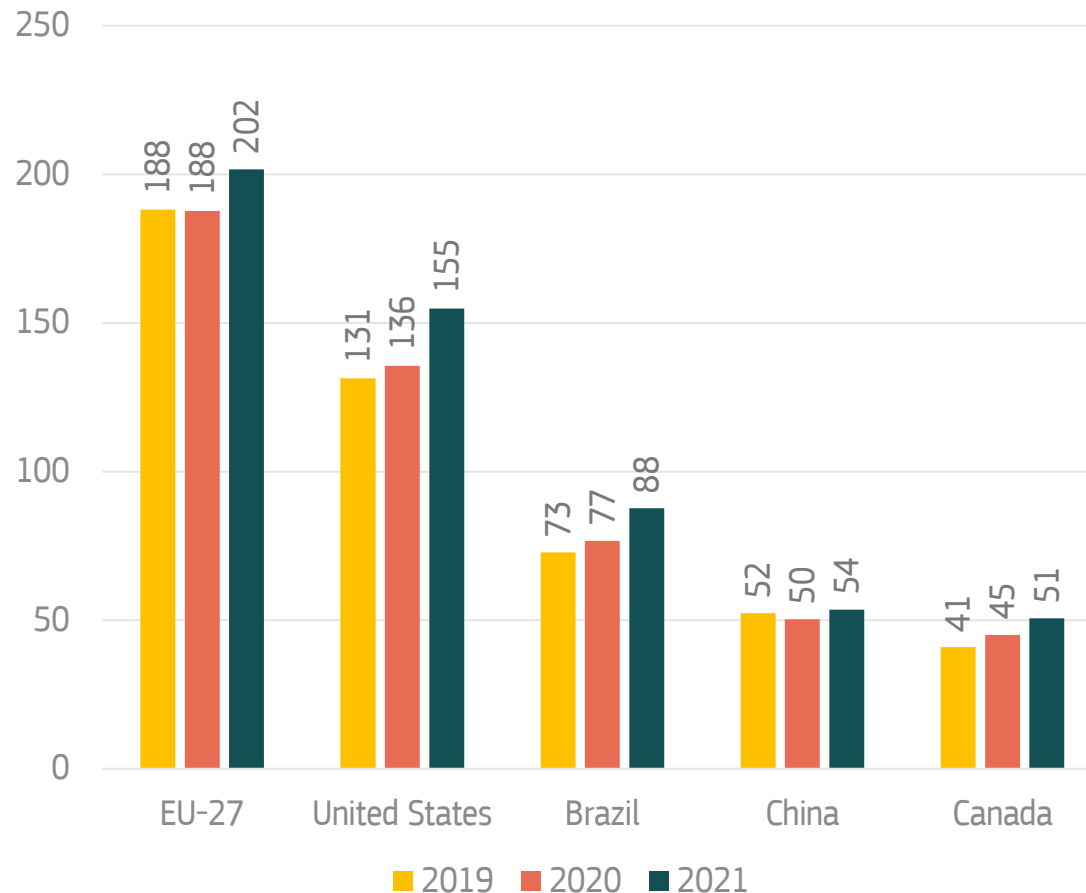
EU-27: Structure of Agri-Food Trade with Extra-EU27, 2010-2021 (in million EUR)



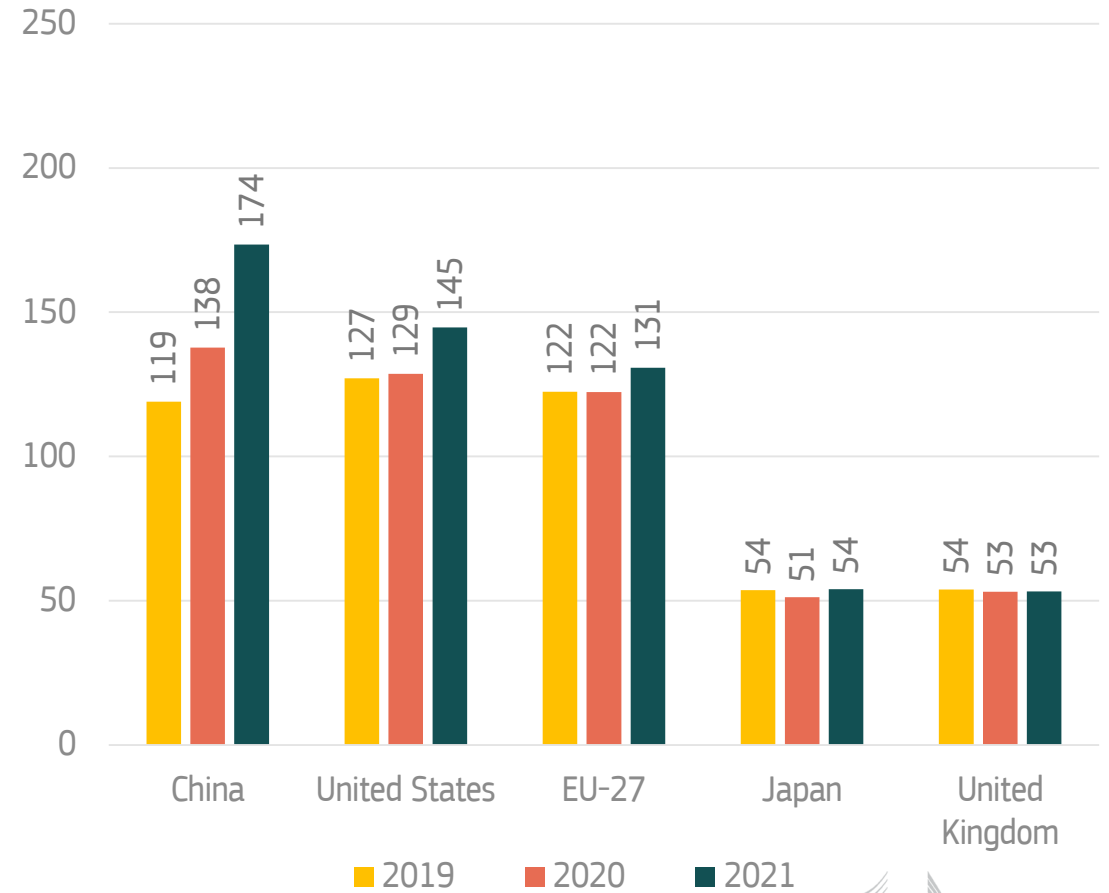
Source: COMEXT

Overall agri-food trade 2021: main trading countries

Top agri-food exporters (billion €)



Top agri-food importers (billion €)

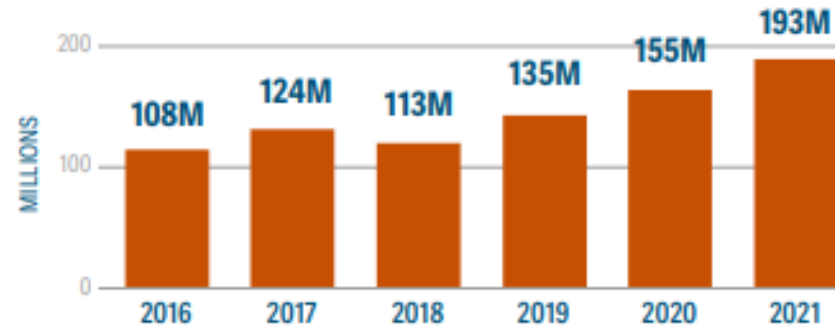


2021 GLOBAL FOOD SECURITY



CONFLICT

The population in Crisis or worse (IPC/CH Phase 3 or above) or equivalent nearly doubled between 2016 and 2021



CLIMATE



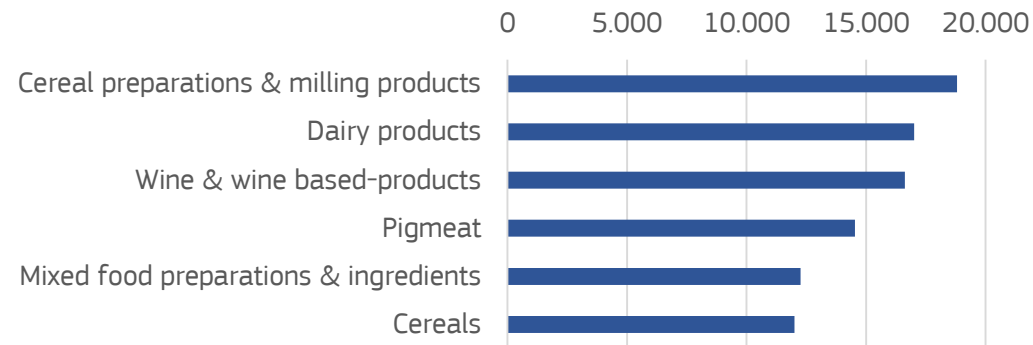
COVID-19

+ 25%

2021: AGRI FOOD EXPORTS

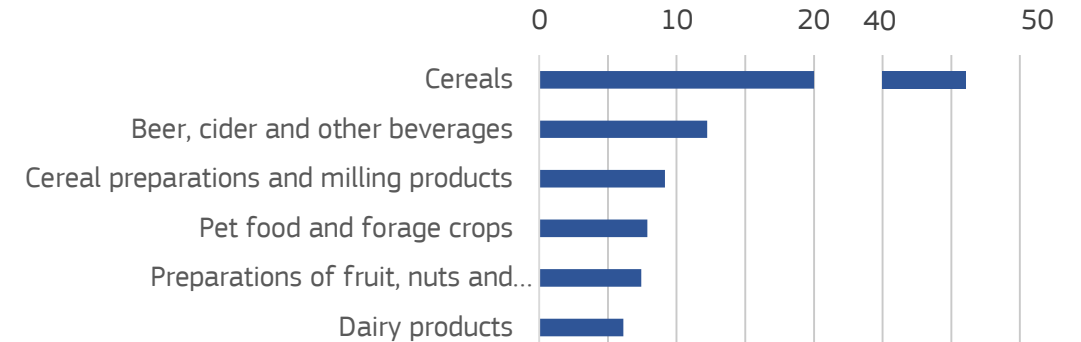
VALUES

Exports - top products in 2021 (million €)

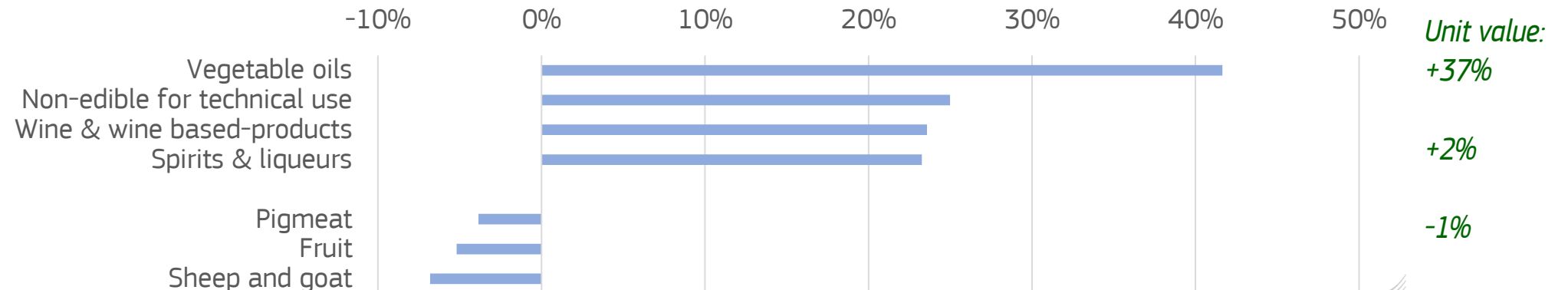


VOLUMES

Exports - top products in 2021 (million t)



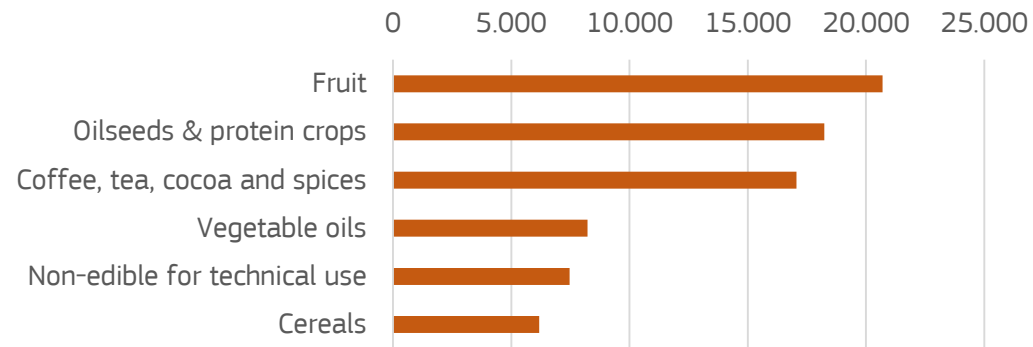
Exports - change in values in 2021



2021: AGRI FOOD IMPORTS

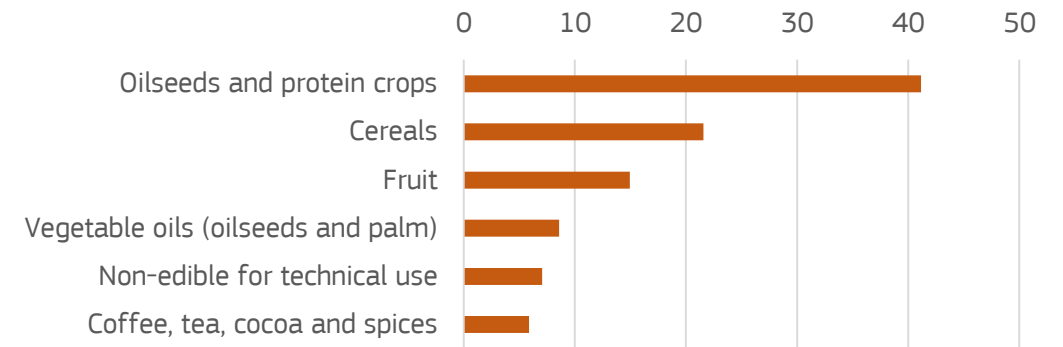
VALUES

Imports - top products in 2021 (million €)

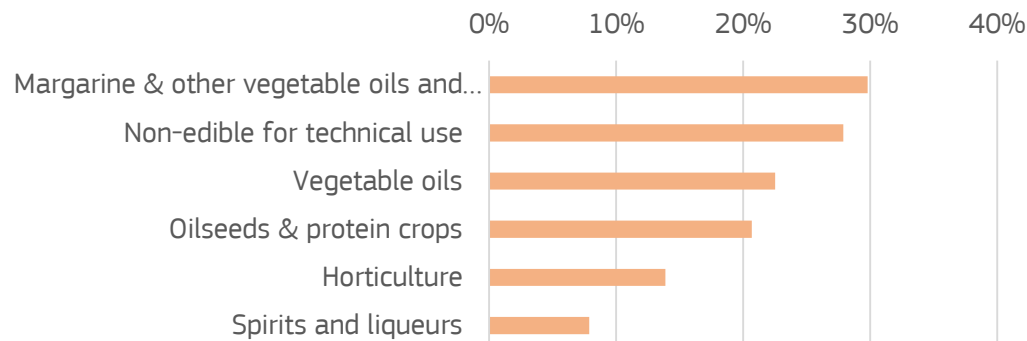


VOLUMES

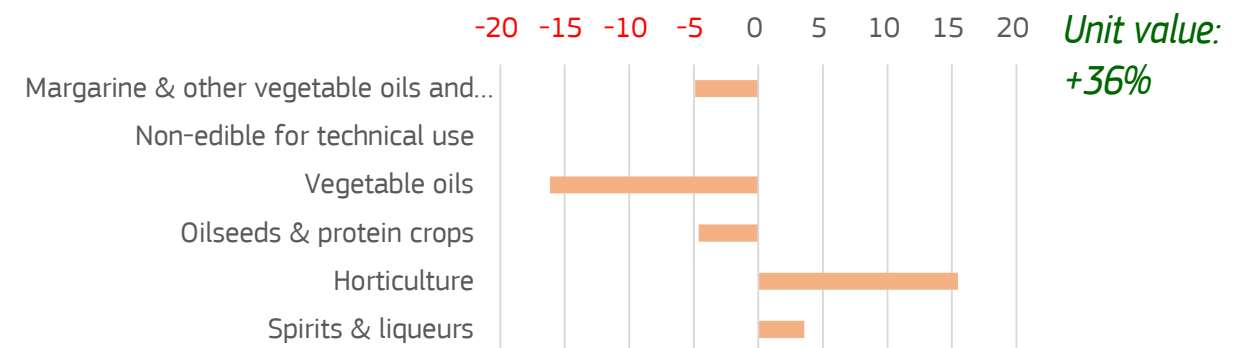
Imports - top products in 2021 (million t)



Imports - highest value change in 2021

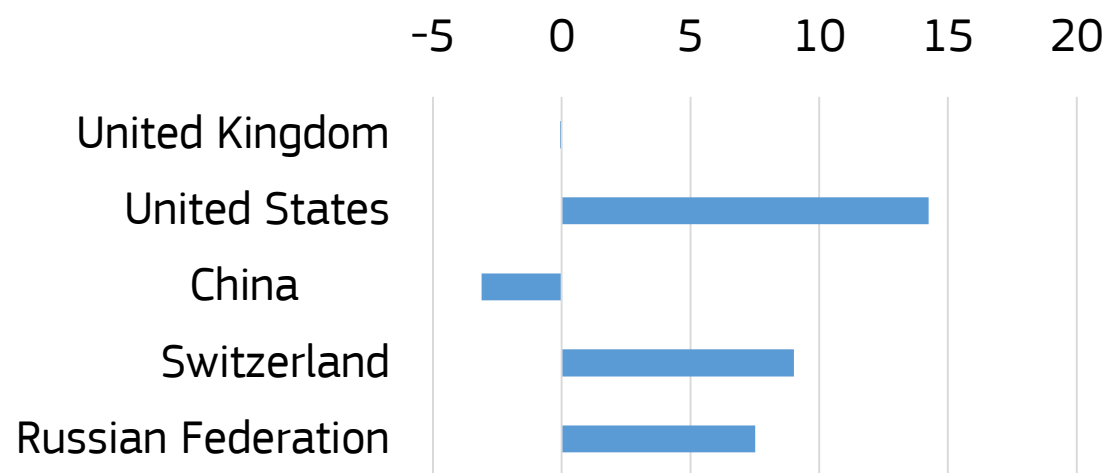


Imports - corresponding volume change in 2021 (%)



2021: AGRI FOOD PARTNERS

Exports value change per partner (%)



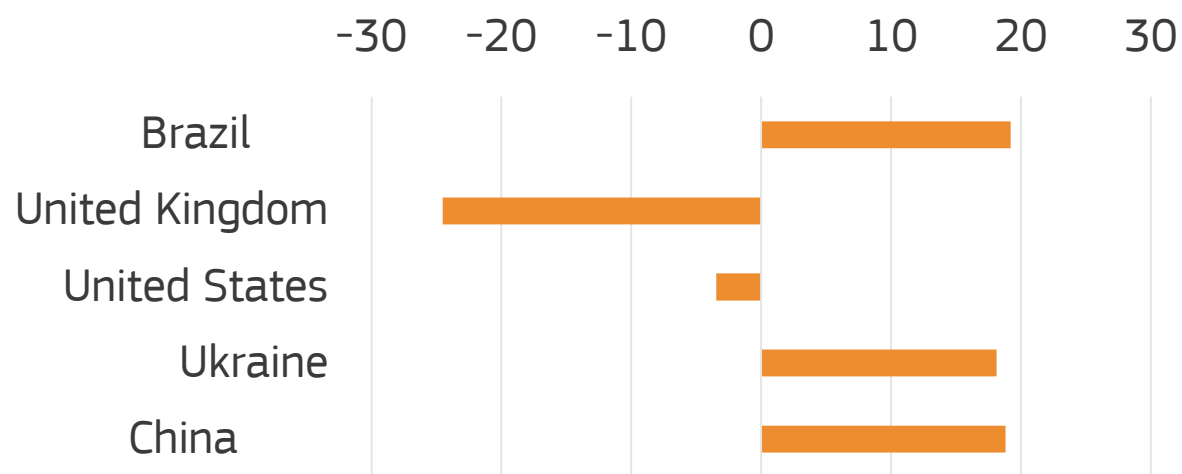
Source: Eurostat COMEXT

EXPORTS to UNITED STATES	Volume change	Unit value change
Wine & wine based products	19.0%	8%
Spirits & liqueurs	19.2%	-1%
Beer, cider and other beverages	-1.9%	-13%
Cereal preparations & milling products	3.0%	4%
Dairy products	14.5%	5%

EXPORTS to UNITED KINGDOM	Volume change	Unit value change
Cereal preparations and milling products	-3%	7%
Wine and wine based products	3%	22%
Dairy products	-6%	5%
Pigmeat	-3%	1%
Vegetables	-8%	11%

2021: AGRI FOOD PARTNERS

Imports value change per partner (%)



Source: Eurostat COMEXT

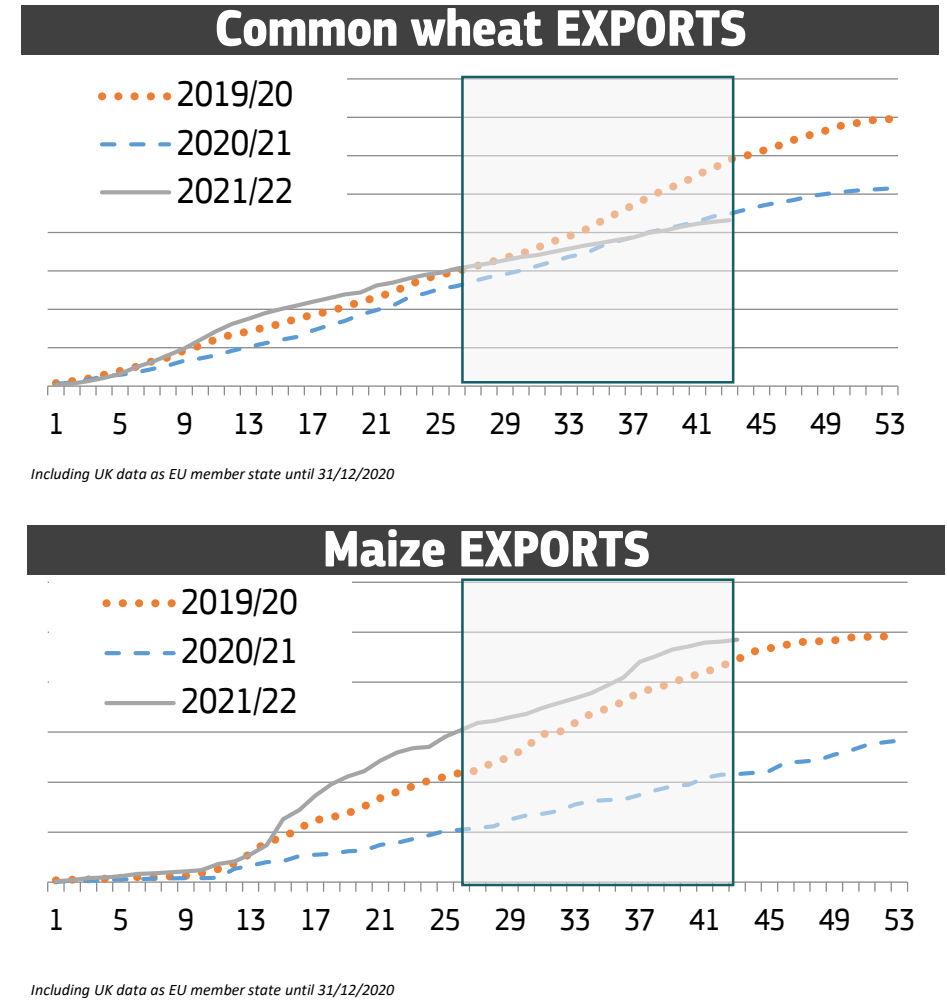
IMPORTS from <u>BRAZIL</u>	Volume change	Unit value change
Oilseeds and protein crops	0%	32%
Coffee, tea, cocoa and spices	11%	12%
Preparations of fruit, nuts and vegetables	-7%	-1%
Fruit	12%	2%
Cereals	-23%	35%

IMPORTS from <u>UNITED KINGDOM</u>	Volume change	Unit value change
Spirits & liqueurs	-6%	10%
Cereal preparations & milling products	-23%	15%
Mixed food preparations & ingredients	-29%	23%
Dairy products	-20%	-6%
Other animal products	-37%	19%

2022 EU and global agri-food trade

Immediate impact on trade flows

- Reduced **imports** of soya, rapeseed and sunflower, and less soya and sunflower meals -> impacts on feed prices and food processing.
- Fertilizers EU imports from Russia are continuing - Trade flows high in March, considerably declined in April
- Food items: *what disruptions to report ?*
- Wheat **exports** at 2020/21 levels and maize exports slightly up: *what expectations for the next months ?*
- Higher oilseed meals exports – less rapeseed oil exports.

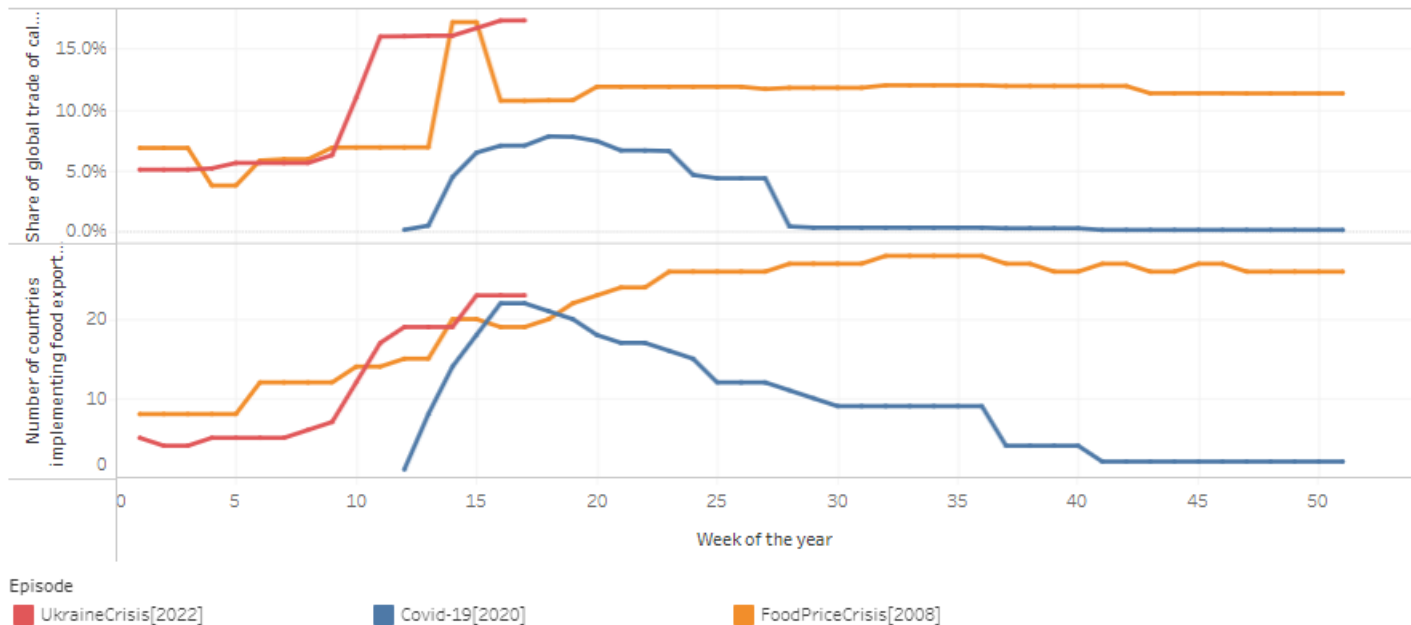


2022 EU and global agri-food trade

Immediate trade policy responses

- Increased number of **agri-food export restrictions** in the wake of the Russian aggression:
 - (April 28) Indonesia implemented a ban on palm oil exports.
- Also imposed on fertiliser trade:
 - Nitrogen export restrictions: Russia export quota on nitrogen and complex fertilisers
 - Phosphate export restrictions

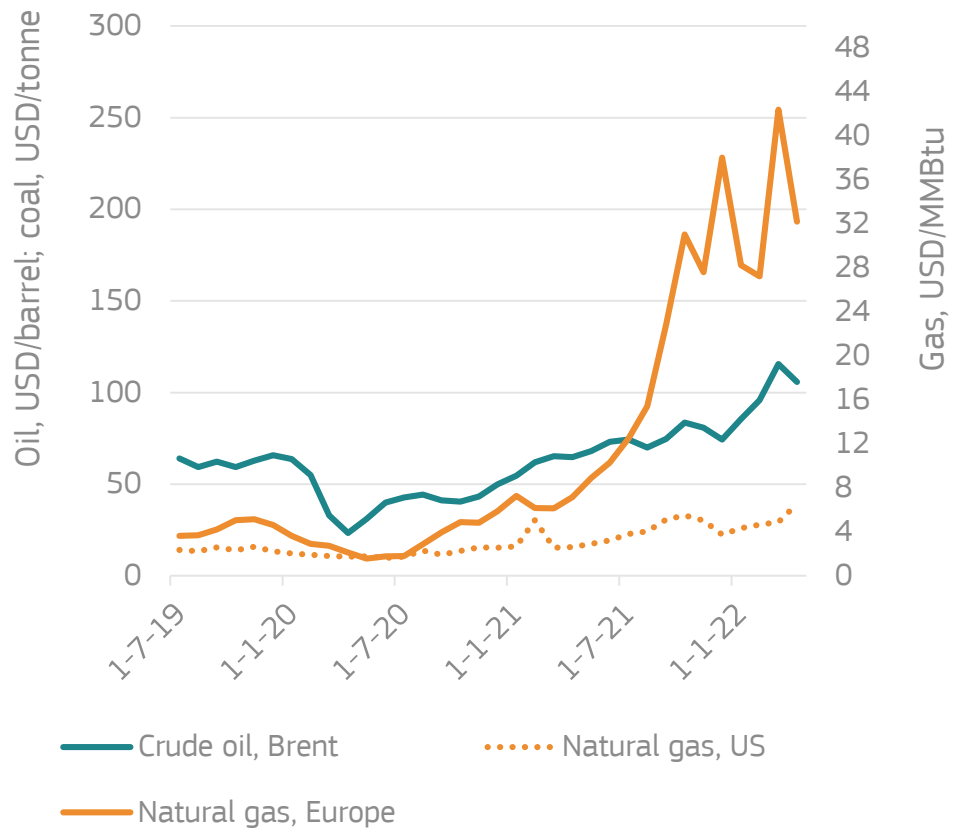
Number of countries implementing Food Export restrictions and associated share in global trade of calories



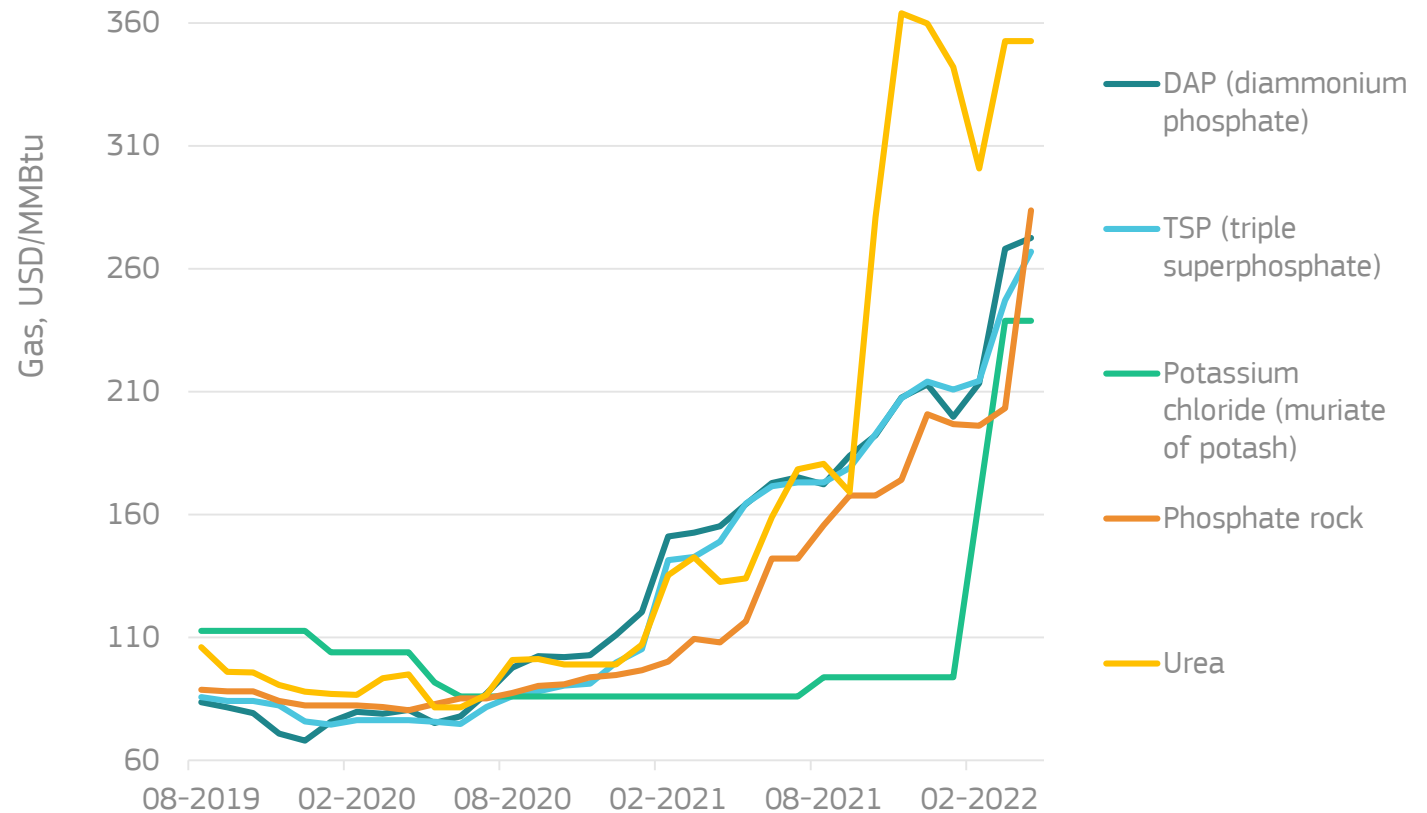
Source: Food Export & Fertilizer Restrictions Tracker: David Laborde (IFPRI), and maintained by David Laborde and Abdullah Mamun (IFPRI)

2022/23: macroeconomic context

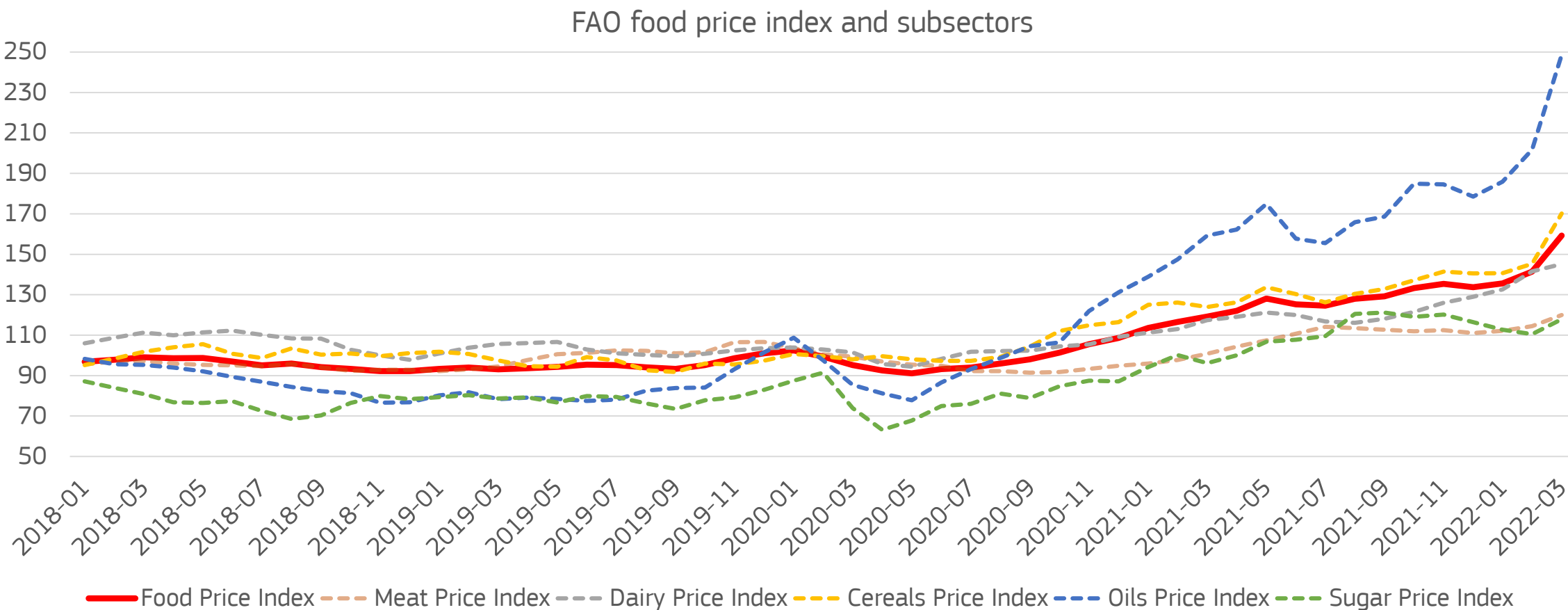
Energy prices



Fertiliser prices (index 2018-2019 = 100)



2022/23: macroeconomic context



2022/23: considerations for the trade outlook

Fert.

- Russia is 14% of the **phosphate** world trade (Finland, Poland and also Brazil are highly dependant)
- For **nitrogen**: 13% of urea and 22% of ammonia global trade

Prod.

- Fair crop conditions in **Russia** and uncertainties in **Ukraine**.
- **Stable global wheat** production in 2022/23

Trade

Global trade supply

- UKR shipments significantly down, Russia exports are forecast at a below-average level.
- + Canada exports could increase and ARG close to record levels. EU exports could increase to 36.0m t (+7.8%).

Global trade demand

- Imports from China and Egypt could decrease.
- + Dry conditions in Algeria and Morocco

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Thank you



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