



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS IN JULY 2022

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Note to the reader

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

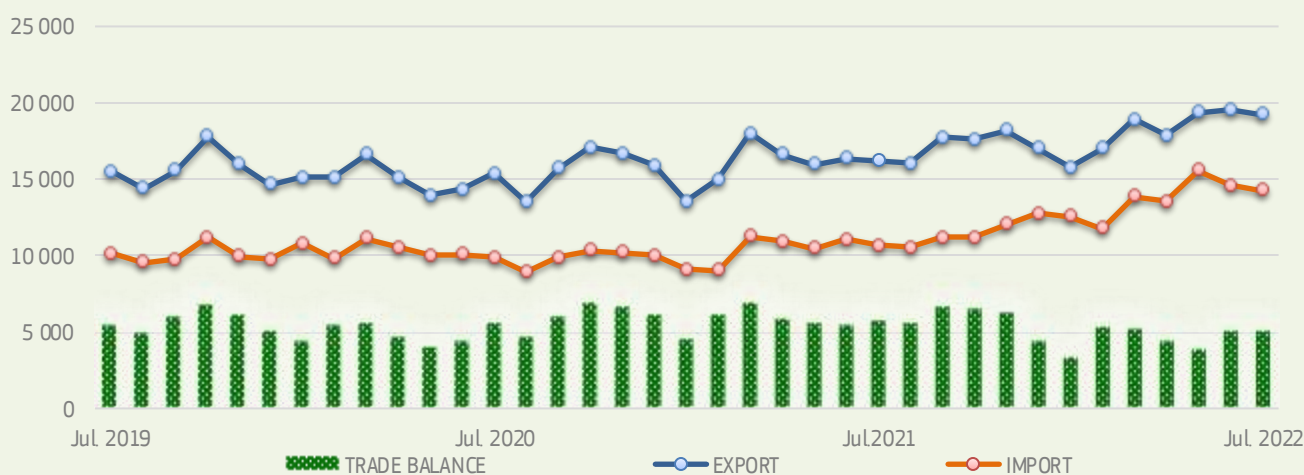
HIGHLIGHTS: EU AGRI-FOOD TRADE SLOWED DOWN IN JULY 2022 – BUT STILL AT HIGH LEVEL

Both EU agri-food exports and imports slowed down in July, in value terms. This resulted in a stable **trade balance at EUR 4.9 billion**, compared to June.

EU **exports** stayed high at **EUR 19.2 billion**. This is a small decrease compared to June (-2%), but still significantly higher compared to last year. The biggest decline came from less dynamic exports of fruit, vegetables and olives. Despite the decline in overall exports, exports of cereals, most particularly wheat but also barley, increased particularly to the MENA region.

EU **imports** reached **EUR 14.3 billion** in July 2022, a -2% decrease compared to the previous month. EU imports from main partners have actually increased in July (mainly from Brazil, the UK, the US and Ukraine) but dropped from many other countries, as notably from China, Argentina and the MENA region.

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



Source: Comext



EU AGRI-FOOD EXPORTS

EU EXPORTS TO MENA REGION INCREASE

In July 2022, EU agri-food exports slightly declined (by 2% month-to-month) in value terms. Commodity prices continue to decrease in July. The FAO food price index dropped by 9% to reach 140.6, but was still 13% higher than last year (July 2021).

EU agri-food exports to the **MENA region** increased the most month-to-month. The biggest increase was recorded for wheat, in volumes (+70%). EU exports of other coarse grains (including barley) increased substantially in July as well (+157%). This means that the EU exported 1.9 million t of wheat in July and 857 thousand t of coarse grains. It is respectively +300% and +84% compared to July of last year.

Instead, EU exports of cereals to **sub-saharan Africa (SSA)** declined (-43%). This comes after a surge in exports of EU cereals to SSA in June 2022, particularly of wheat. Generally, EU agri-food exports to SSA declined to reach EUR 1 billion (-30% month-to-month). On top of the decline in cereals, exports of poultry meat, SMP and beef and veal also fell.

Trade developments in January-July 2022

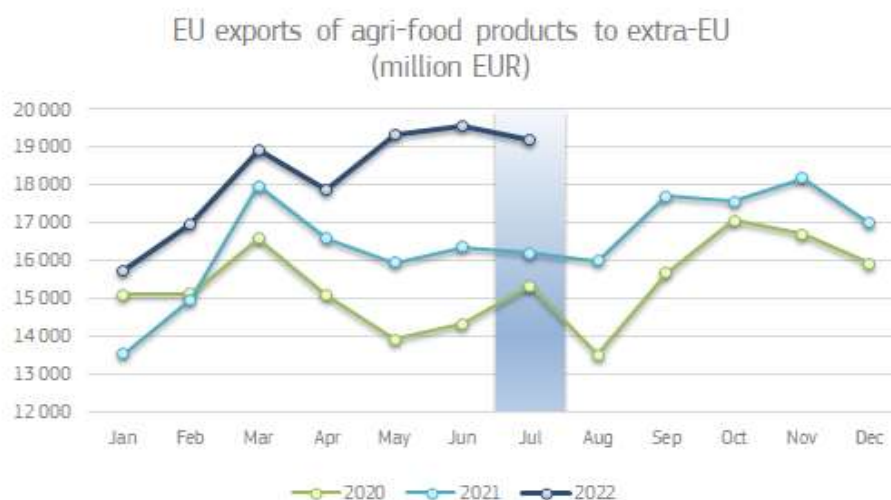
Total EU exports since the beginning of the year (until July) reached EUR 127 billion. This is 14% above last year's same period.

WITH THE FRESH EU HARVEST, CEREALS ON TOP OF THE EXPORTED PRODUCTS

In July 2022, exports of **cereals** continued to dominate the EU total export values. The EU exported for EUR 2.3 billion. Second highest value in EU agri-food exports in July were **cereals preparations and milling products**, followed closely by exports of **dairy products** (EUR 1.8 billion).

The dynamic in cereal exports was led by an overall increase in volumes (+46%), and registered a drop in prices (-7%) compared to June. **Wheat** exports reached 3 million t, a 74% increase compared to July last year. Compared to June, wheat exports increased by 21% in volume terms and the unit value dropped by 4%.

On the other end, exports of certain categories declined in July. This was the case for **fruit and nuts** (-EUR 69 million, -15%) and **vegetables** (-EUR 59 million, -10%), which registered their second and fourth consecutive decline, respectively. Specifically, the biggest declines were noted for **apples and pears** (to the UK and Egypt), **citrus** and for **potatoes** (to the UK and Switzerland). **Olives and olive oil** exports dropped by EUR 67 million (-14%) in July, largely due to the decline of exports to the US.



EU AGRI-FOOD IMPORTS

EU IMPORT BILL EASED IN JULY 2022

EU imports declined for the second month in a row in July to EUR 14.3 billion (-2.2%), although still at high level. Imports from Argentina, Morocco and Turkey declined month-to-month. At the same time, EU imports from major trading partners increased, notably from Brazil and the US as well as from Malaysia. EU imports from Ukraine continue their fourth consecutive month of growth.

EU imports from **Brazil** increased by 8% in July compared to June 2021, mainly due to increased imports of maize (+492%) and soya cakes (+35%) in value terms. This was largely due to an increase in volumes imported in the EU. Maize imports reached in July a record high (685 thousand t).

Imports from **the US** increased in July due to a sharp increase of soya beans imports as well as nuts. Soya beans imports from the US increased by 158% to reach EUR 231 million in July. This was driven by a rise in imported quantities (354 thousand t, +163% month-to-month). Nuts imports also increased in volume terms (53 thousand t, +16%).

The steepest increase in EU imports from **Malaysia** in July 2022 came from palm oil. They reached EUR 217 million (+57% month-to-month). This is only due to a rise of quantities imported in the EU and compensates for the reduction of imports from Indonesia, due to a 3-weeks export

ban and difficulties to resume appropriate levels of imports.

Trade developments in January-July 2022

Total EU imports since the beginning of the year (until July) reached EUR 96 billion. This is 33% above last year's same period.

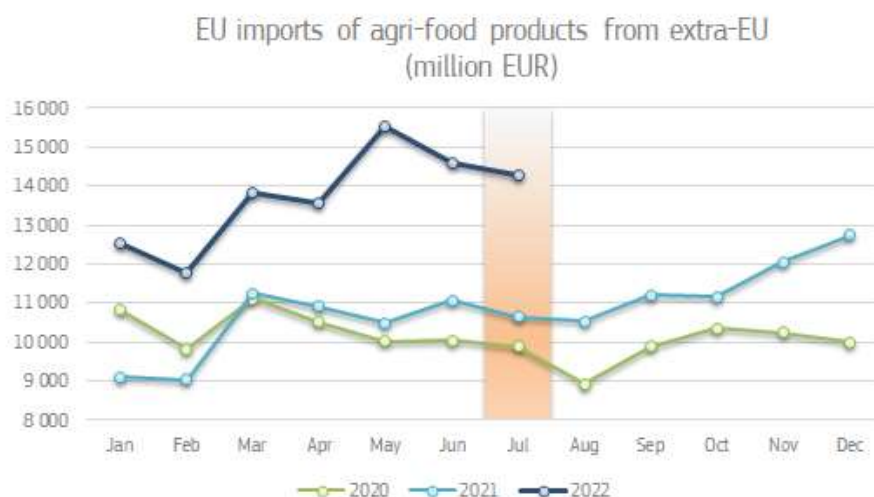
EU IMPORTS DECLINED BUT DYNAMIC SOYA, NUTS AND PALM OIL

In July 2022, imports of soya beans, nuts and palm oil increased month-to-month. **Soya beans** imports reached EUR 871 million (+7%) for 1.3 million t. These came mainly from Brazil (at a higher price compared to June) and the US (at a lower price).

Nuts imports reached EUR 604 million (+6%) for 150 thousand t. Nuts imports came mainly from the US and Vietnam at respectively a stable and higher price compared to June.

Palm oil imports reached EUR 592 million (+20% month-to-month) for 404 thousand t. These largely came from Malaysia and Indonesia at a relatively similar price compared to June.

Imports of grapes, sunflower seeds and bananas decreased the most in July (month-to-month). They respectively declined by 24% (to reach EUR 58 million), 20% (EUR 240 million) and 18% (EUR 232 million).



FOCUS

EU trade with the United Kingdom in January-July 2022

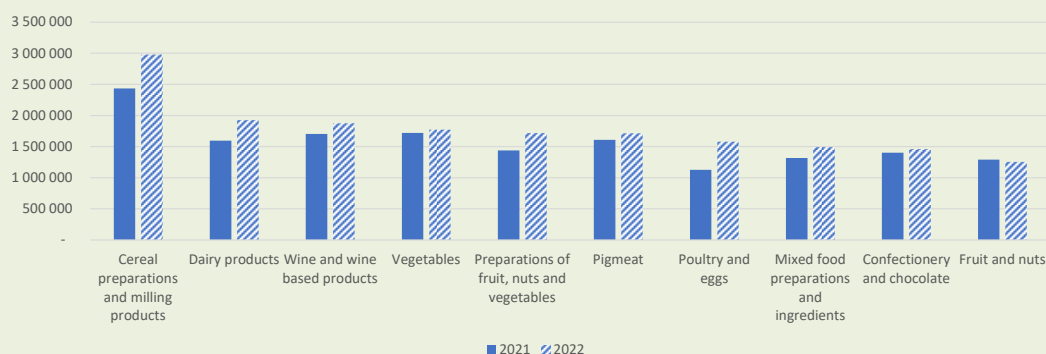
The United Kingdom has become the first trading partner with the EU. The total exchange of agri-food products reached EUR 53.8 billion in 2021. Relative to this, the second trading partner is the US for which trade worth EUR 33.8 billion in 2021.

Cereal preparations and milling products are the primary category in EU-UK agri-food trade. The EU traded in 2021 EUR 5.8 billion of these products with the UK. The second most traded food items are dairy products. The main dairy products traded are cheese and curd, fresh dairy products and butter.

In 2022, total agri food trade increased substantially between the EU and the UK. For the first seven months in 2022, the agri-food trade expanded by 21%, to reach EUR 35.5 billion, compared to the specific situation beginning 2021 when the EU-UK Trade and Cooperation Agreement entered into force.

EU exports to the UK have increased by 17% to reach EUR 27 billion in January to July 2022. The steepest increases, in value terms, were for cereal preparations and milling products (+22%), Poultry and eggs (+40%) and dairy products (+21%).

EU exports to the UK from January to July
- in thousand EUR



EU imports from the UK also increased and reached EUR 8.4 billion (+35%) in the first seven months of 2022. This is almost at pre-Brexit levels (still -2% compared to January-July period in 2020). The biggest increase was recorded for spirits and liqueurs (+35%), dairy products (+55%) and cereals (+159%).

EU imports from the UK from January to July
- in thousand EUR

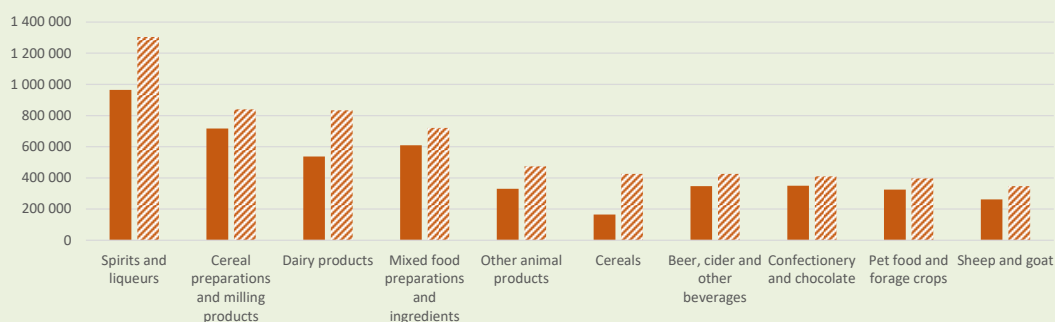


TABLE 1

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Jul21	Jan22-Jul22	Difference	
TOTAL AGRIFOOD	184 468	198 107	100%	111 624	127 668	16 044	14%
United Kingdom	41 963	41 940	21%	23 183	27 087	3 905	17%
United States	21 447	24 511	12%	13 867	16 787	2 920	21%
Morocco	2 165	2 366	1%	1 410	2 459	1 050	74%
Switzerland	9 030	9 844	5%	5 734	6 467	733	13%
Korea, Republic of	3 029	3 939	2%	2 189	2 768	579	26%
Ukraine	2 841	3 108	2%	1 699	1 581	- 119	-7%
Cambodia	252	419	0%	314	133	- 180	-57%
Hong Kong	2 541	2 157	1%	1 256	1 013	- 243	-19%
Russian Federation	6 841	7 359	4%	4 050	3 592	- 458	-11%
China	17 684	17 138	9%	10 777	8 271	-2 506	-23%
Other countries	76 676	85 325	43%	47 146	57 509	10 364	22%

TABLE 2

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Jul21	Jan22-Jul22	Difference	
TOTAL AGRIFOOD	184 468	198 107	100%	111 624	127 668	16 044	14%
United Kingdom	41 963	41 940	21%	23 183	27 087	3 905	17%
United States	21 447	24 511	12%	13 867	16 787	2 920	21%
China	17 684	17 138	9%	10 777	8 271	- 2 506	-23%
Switzerland	9 030	9 844	5%	5 734	6 467	733	13%
Japan	6 984	7 384	4%	4 234	4 712	478	11%
Russian Federation	6 841	7 359	4%	4 050	3 592	- 458	-11%
Norway	4 844	5 408	3%	3 123	3 381	258	8%
Korea, Republic of	3 029	3 939	2%	2 189	2 768	579	26%
Canada	3 637	4 049	2%	2 203	2 648	445	20%
Morocco	2 165	2 366	1%	1 410	2 459	1 050	74%
Saudi Arabia	4 305	3 630	2%	2 059	2 389	330	16%
Turkey	3 061	3 567	2%	1 915	2 219	304	16%
Australia	3 188	3 300	2%	1 805	2 149	345	19%
Algeria	2 989	2 950	1%	1 664	2 107	442	27%
Israel	2 141	2 648	1%	1 479	1 821	342	23%
Other countries	51 160	58 073	29%	31 932	38 812	6 879	22%

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-Jul21	Jan22-Jul22	Difference	
TOTAL AGRIFOOD	184 468	198 107	100%	111 624	127 668	16 044	14%
Cereals	11 414	12 004	6%	6 098	9 424	3 325	55%
Cereal preparations and milling products	18 779	18 812	9%	10 450	12 488	2 037	19%
Dairy products	15 988	17 002	9%	9 714	11 437	1 723	18%
Mixed food preparations and ingredients	11 208	12 265	6%	6 992	8 386	1 394	20%
Preparations of fruit, nuts and vegetables	8 060	8 410	4%	4 646	5 620	975	21%
Sheep and goat	617	575	0%	378	445	66	18%
Tobacco, cigars and cigarettes	5 606	5 512	3%	3 254	3 299	45	1%
Sugar and isoglucose	556	596	0%	299	335	36	12%
Horticulture	3 868	4 632	2%	2 795	2 705	- 90	-3%
Pigmeat	15 110	14 525	7%	9 090	7 652	-1 438	-16%
Other products	93 261	103 773	52%	57 908	65 878	7 970	14%

TABLE 4

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Jul21	Jan22-Jul22	Difference	
TOTAL AGRIFOOD	184 468	198 107	100%	111 624	127 668	16 044	14%
Cereal preparations and milling products	18 779	18 812	9%	10 450	12 488	2 037	19%
Dairy products	15 988	17 002	9%	9 714	11 437	1 723	18%
Wine and wine based products	13 452	16 631	8%	9 315	10 241	926	10%
Cereals	11 414	12 004	6%	6 098	9 424	3 325	55%
Mixed food preparations and ingredients	11 208	12 265	6%	6 992	8 386	1 394	20%
Pigmeat	15 110	14 525	7%	9 090	7 652	- 1 438	-16%
Beer, cider and other beverages	9 713	10 013	5%	5 765	6 260	495	9%
Preparations of fruit, nuts and vegetables	8 060	8 410	4%	4 646	5 620	975	21%
Spirits and liqueurs	6 820	8 410	4%	4 623	5 467	844	18%
Confectionery and chocolate	7 886	8 889	4%	4 558	5 312	754	17%
Pet food and forage crops	6 506	7 346	4%	4 128	4 828	700	17%
Vegetables	7 361	7 396	4%	4 172	4 487	315	8%
Other animal products	6 510	7 531	4%	4 379	4 454	75	2%
Coffee, tea, cocoa and spices	5 932	6 176	3%	3 499	4 101	603	17%
Fruit and nuts	6 026	5 711	3%	3 233	3 388	154	5%
Other products	33 701	36 984	19%	20 961	24 123	3 162	15%

TABLE 5

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Jul21	Jan22-Jul22	Difference	
TOTAL AGRIFOOD	121 599	130 189	100%	72 503	96 167	23 663	33%
Brazil	11 362	13 536	10%	7 737	11 342	3 604	47%
Ukraine	5 837	6 917	5%	3 195	5 375	2 180	68%
United Kingdom	15 685	11 866	9%	6 206	8 371	2 164	35%
China	5 128	6 096	5%	3 185	5 329	2 144	67%
United States	9 587	9 254	7%	5 223	6 895	1 672	32%
Senegal	90	113	0%	103	90	- 13	-13%
Cameroon	697	694	1%	428	404	- 23	-5%
Côte d'Ivoire	3 302	3 341	3%	2 108	2 080	- 28	-1%
Nigeria	477	655	1%	403	306	- 97	-24%
Canada	3 131	2 831	2%	1 579	1 447	- 131	-8%
Other countries	66 303	74 888	58%	42 336	54 527	12 191	29%

TABLE 6

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Jul21	Jan22-Jul22	Difference	
TOTAL AGRIFOOD	121 599	130 189	100%	72 503	96 167	23 663	33%
Brazil	11 362	13 536	10%	7 737	11 342	3 604	47%
United Kingdom	15 685	11 866	9%	6 206	8 371	2 164	35%
United States	9 587	9 254	7%	5 223	6 895	1 672	32%
Ukraine	5 837	6 917	5%	3 195	5 375	2 180	68%
China	5 128	6 096	5%	3 185	5 329	2 144	67%
Argentina	4 378	5 176	4%	2 668	3 804	1 136	43%
Indonesia	4 334	5 635	4%	2 931	3 459	528	18%
Turkey	4 652	5 031	4%	2 782	3 150	367	13%
Australia	1 155	1 900	1%	1 338	2 829	1 491	111%
Switzerland	4 596	4 521	3%	2 510	2 721	212	8%
Morocco	2 471	2 636	2%	1 787	2 287	500	28%
India	2 364	2 919	2%	1 795	2 131	336	19%
Côte d'Ivoire	3 302	3 341	3%	2 108	2 080	- 28	-1%
Viet Nam	2 168	2 221	2%	1 202	1 948	747	62%
Malaysia	2 249	2 678	2%	1 380	1 936	556	40%
Other countries	42 332	46 462	36%	26 456	32 509	6 052	23%

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-Jul21	Jan22-Jul22	Difference	
TOTAL AGRIFOOD	121 599	130 189	100%	72 503	96 167	23 663	33%
Oilseeds and protein crops	15 115	18 253	14%	10 442	15 139	4 697	45%
Coffee, tea, cocoa and spices	15 944	17 063	13%	9 628	12 670	3 042	32%
Non-edible for technical use	5 841	7 486	6%	3 760	6 386	2 626	70%
Cereals	5 771	6 176	5%	3 406	5 577	2 171	64%
Vegetable oils (oilseeds and palm)	6 712	8 243	6%	4 152	6 133	1 981	48%
Horticulture	1 688	1 923	1%	1 136	1 279	143	13%
Wine and wine based products	1 775	1 664	1%	887	991	104	12%
Sugar and isoglucose	843	878	1%	454	542	88	19%
Olives and olive oil	751	636	0%	369	432	62	17%
Pigmeat	415	294	0%	162	207	45	28%
Other products	66 742	67 573	52%	38 106	46 811	8 705	23%

TABLE 8

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Jul21	Jan22-Jul22	Difference	
TOTAL AGRIFOOD	121 599	130 189	100%	72 503	96 167	23 663	33%
Oilseeds and protein crops	15 115	18 253	14%	10 442	15 139	4 697	45%
Fruit and nuts	21 050	20 704	16%	12 071	13 068	996	8%
Coffee, tea, cocoa and spices	15 944	17 063	13%	9 628	12 670	3 042	32%
Non-edible for technical use	5 841	7 486	6%	3 760	6 386	2 626	70%
Vegetable oils (oilseeds and palm)	6 712	8 243	6%	4 152	6 133	1 981	48%
Cereals	5 771	6 176	5%	3 406	5 577	2 171	64%
Mixed food preparations and ingredients	5 182	5 588	4%	3 120	3 961	841	27%
Preparations of fruit, nuts and vegetables	5 412	5 420	4%	3 070	3 582	511	17%
Other animal products	4 660	4 657	4%	2 506	3 372	866	35%
Vegetables	4 146	4 278	3%	2 615	3 118	503	19%
Margarine and other oils and fats (vegetable)	3 023	3 939	3%	2 173	3 054	881	41%
Cereal preparations and milling products	3 759	3 852	3%	2 127	2 747	620	29%
Spirits and liqueurs	3 060	3 296	3%	1 662	2 287	625	38%
Pet food and forage crops	2 705	2 751	2%	1 510	2 028	518	34%
Tobacco, cigars and cigarettes	2 468	2 299	2%	1 319	1 794	475	36%
Other products	16 749	16 182	12%	8 941	11 253	2 312	26%

TABLE 9

AGRI-FOOD TRADE BALANCE (MILLION EUR)

TRADE BALANCE			
PRODUCT/PERIOD	Exports Jan22-Jul22	Imports Jan22-Jul22	Trade balance Jan22-Jul22
	million EUR		
TOTAL AGRIFOOD	127 668	96 167	31 501
Dairy products	11 437	1 365	10 072
Cereal preparations and milling products	12 488	2 747	9 740
Wine and wine based products	10 241	991	9 251
Pigmeat	7 652	207	7 445
Beer, cider and other beverages	6 260	1 344	4 916
Mixed food preparations and ingredients	8 386	3 961	4 425
Cereals	9 424	5 577	3 846
Confectionery and chocolate	5 312	1 473	3 839
Spirits and liqueurs	5 467	2 287	3 180
Pet food and forage crops	4 828	2 028	2 800
Olives and olive oil	2 904	432	2 473
Preparations of fruit, nuts and vegetables	5 620	3 582	2 039
Poultry and eggs	3 234	1 245	1 989
Tobacco, cigars and cigarettes	3 299	1 794	1 505
Horticulture	2 705	1 279	1 427
Vegetables	4 487	3 118	1 369
Other animal products	4 454	3 372	1 083
Unspecified	1 122	106	1 016
Beef and veal	2 438	1 506	932
Sugar and isoglucose	335	542	-207
Sheep and goat	445	764	-320
Margarine and other oils and fats (vegetable)	1 301	3 054	-1 753
Non-edible for technical use	2 748	6 386	-3 638
Vegetable oils (oilseeds and palm)	2 187	6 133	-3 946
Coffee, tea, cocoa and spices	4 101	12 670	-8 569
Fruit and nuts	3 388	13 068	-9 680
Oilseeds and protein crops	1 406	15 139	-13 733



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