



European
Commission



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS IN FEBRUARY 2022

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<https://ec.europa.eu/info/food-farming-fisheries/trade/trade-and-international-policy-analysis>

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Next issue will be published on 20/06/2022

Disclaimer

The latest available consolidated trade data at EU level cover the development until February 2022. This means the impact of the Russian aggression in Ukraine is not yet covered by this newsletter.

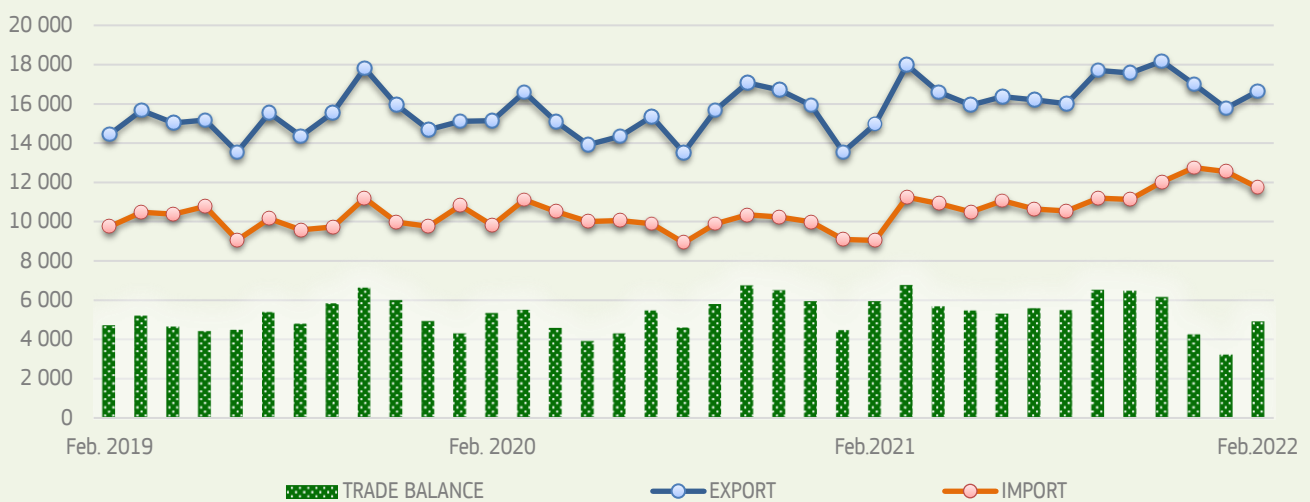
The trade figures are all expressed in values, except when specifically mentioned. The current situation of high agri-food prices therefore plays an important role. An increase in trade values for a specific product must not necessarily correspond to an increase in volume for this product.

HIGHLIGHTS: IN FEBRUARY 2022, LESS IMPORTS LIFT EU TRADE BALANCE COMPARED TO JANUARY

In February 2022, the EU trade balance reached **€4.9 billion**. Thanks to a slight rebound of EU exports value and a lower total import value compared to January, the EU trade balance improved by 52% month-to-month.

EU agri-food trade (exports plus imports) reached a value of **€28.3 billion**; +18% compared to last year in February. EU exports reached **€16.6 billion**, +11% compared to last year. EU imports stood up at **€11.7 billion**, +30% compared to February 2021. These monthly trade flows are rather in the upper end of the range of the last two years.

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



Source: Comext



EU AGRI-FOOD EXPORTS

EU EXPORTS TO THE UK, U.S. AND JAPAN INCREASE YEAR-TO-YEAR

EU agri-food exports in February 2022 were primarily sent to the United Kingdom, the U.S. and China. For the first two months in 2022, exports to the United Kingdom and to the U.S. increased substantially year-to-year (*i.e.* compared to the period Jan-Feb 2021). Japan was the 6th most popular destination for EU exports in 2021. For the beginning of the year, EU exports increased by 25% year-to-year.

EU exports to the **UK** (Jan-Feb 2022) increased by 23% year-to-year. This increase is mostly driven by wine, and poultry and eggs. Total EU export in Jan-Feb 2022 to the UK reached €6.6 billion. In volume terms, sugar and isoglucose exports increased substantially, especially for white sugar (28 000 t, +265% year-to-year).

EU exports to **the U.S.** totalled €4.0 billion in the period Jan-Feb 2022 (+26% year-to-year). This is largely driven by an increase of exports of beverages: in value terms, +28% for spirits and liqueurs, +23% for wine and +6% for beer, cider & other beverages.

EU exports to **China** dropped in the first two months of 2022 compared to the same period in 2021 (↘€836 m, -28%). The most important decrease occurred for pigmeat (↘€856 m, -66% year-to-year). In volume terms, the EU exported 237 000 t

(360 000t less compared to Jan-Feb 2021). Similarly, the EU exported significantly less vegetable oils to China (-99% in volumes).

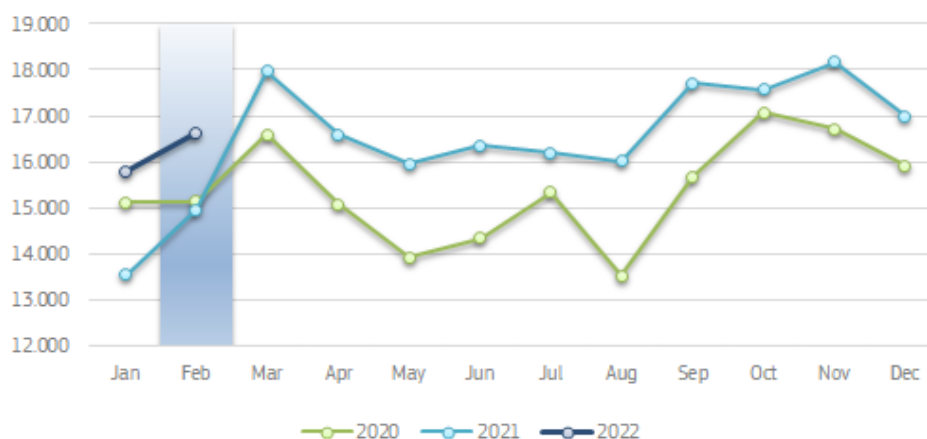
Regarding EU trade flows to **Russia** in Jan-Feb 2022 (pre-aggression), exports amounted €1.3 billion (5th top export destination for the EU). The two main exporting sectors were horticulture and cereal preparations & milling products.

EU EXPORTS VALUE INCREASES BY 14% COMPARED TO LAST YEAR, PIGMEAT DROPS BY 20%

Cereal preparations and milling products, dairy products and wine and wine-based products were the three main product categories exported from the EU in 2021 in value terms. During the period Jan-Feb 2022, the three categories are also on the top of the chart. The EU exported €3.1 billion of cereals preparations and milling products, €2.8 billion of dairy products and €2.3 billion of wine and wine-based products. All values are up compared to the same period of last year.

Regarding the livestock sector, **beef and veal** export value increased by 29% year-to-year (especially frozen meat exports). On the contrary, export value for **pigmeat** dropped by 20% year-to-year (of the 27 categories, it is the only one for which the export value dropped compared to last year).

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



EU AGRI-FOOD IMPORTS

EU IMPORTS VALUE UP BY 34% COMPARED TO JAN-FEB LAST YEAR

In the period Jan-Feb 2022 (before the Russian aggression), EU imports from Ukraine increased the most year-to-year (+96%). Still, the top 3 import sources were Brazil, U.S. and the UK. Import values from these countries all increased in this period compared to last year.

EU imported €879 m of agri-food products from **Ukraine** in February 2022, before the Russian aggression. In the Jan-Feb 2022 period, the EU imported €1.9 billion (+96% year-to-year). Cereals, vegetable oils and oilseeds imports increased both in value and in volume terms. Compared to last year, the EU imported an additional 1.4 million t of cereals in the Jan-Feb period given the record grains harvested in Ukraine last year.

As from January 2021 the Trade and Cooperation Agreement with the UK was applied. Agri-food **imports from UK** were at rather low levels in the first two months of 2021, while in Jan-Feb 2022 they increased by 75% and reached €2.1 billion. Spirits and liqueurs import value increased significantly (+105%), as well as cereals preparations (67%) and fresh dairy products (+52%).

Import values from **Brazil** increased substantially in the first two months (+62% year-to-year). Soya beans and meals imports have been rather dynamic in this period. Concerning vegetable oils, the EU imported slightly less quantities in the period but the value increased by 150%.

EU imports from U.S. and China also increased in

this period by 18% and 65%, respectively. From the **U.S.**, the EU imported mainly oilseeds and protein crops as well as fruit and nuts. While the import value increased, quantities slightly declined. Regarding **China**, the main imported products in Jan-Feb 2022 were fatty acids and waxes (+137% year-to-year).

Imports from **Canada** (€2.8 billion in 2021), decreased the most in the period compared to last year (↘126 m, -22%).

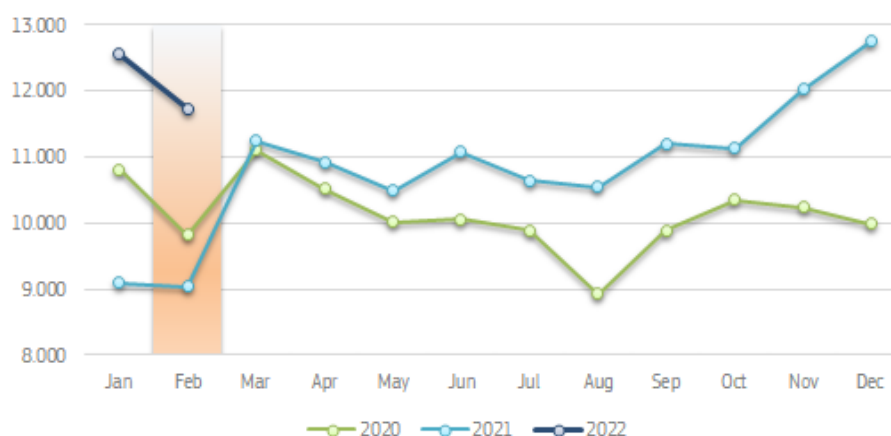
COFFEE IMPORT VALUE INCREASED THE MOST YEAR-TO-YEAR

In the period Jan-Feb 2022, EU import value for **oilseeds** (seeds, meals and vegetable oils including palm) increased by 31% year-to-year. The EU imported for over €5 billion of these agricultural products. While imports of all seeds and meals also increased in volume terms, the palm oil imported volumes declined, possibly due to the high price.

In the period Jan-Feb 2022, **coffee, tea, cocoa and spices** became the second product category imported into the EU. This has been mainly driven by the increase in the import value for coffee (+66% year-to-year). The sharp price increase of Arabica coffee started in April 2021 and continued through the year. In February, the world market price reached levels not seen since 2011.

Fruit imports decreased compared to last year, especially for grapes (↘€115 m, -29%) and bananas (↘€69 m, -13%).

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

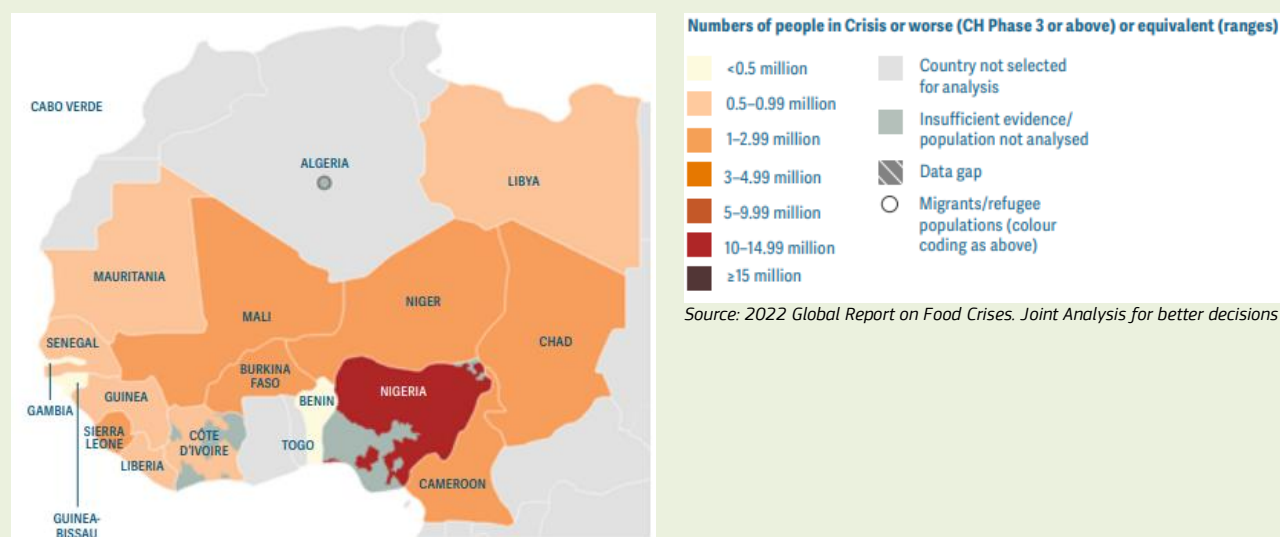


FOCUS

EU AGRI-FOOD TRADE WITH THE SAHEL in 2021

The *Sahel* is a trans-continental region in Africa, characterized by specific agro-climatic conditions and socio-political instability in recent years. A large share of the farming sector is agro-pastoralism and subsistence farming. This region comprises Burkina Faso, Cameroon, Chad, The Gambia, Guinea, Mauritania, Mali, Niger, Nigeria and Senegal. A number of these countries is landlocked adding barriers to international trade.

According to the Global Report on Food Crises¹ published early May 2022, the number of food insecure people has increased during 2021. It is estimated that, in these countries, people facing a food crisis, or worse) increased from 21.6 million people in 2020 to 25.9 million people in 2021. The report identifies three main causes for this rise in food insecurity: (1) conflict, (2) climate events, and (3) covid-related economic impacts. The highest increase has been recorded in the Nigeria and Niger, due to adverse economic conditions (cross-border restrictions and lockdown measures) associated with persistent conflict in some regions that displaced people and reduced the access to farmland.



The EU is a net exporter to the region and exports primarily staple food. Close to one third of total EU agri-food exports to this region is cereals (in value terms). This is largely driven by wheat exports, which corresponds to 85% of EU cereals export value. In volume terms, 3.9 million t of wheat have been exported in 2021.

Dairy products are the second largest export sector to the Sahel. In 2021, the EU exported worth € 874 million of dairy products. Milk powders (whey, whole milk powder and skimmed milk powder) represent the highest share (86%) of the total EU exports of dairy products to this region (corresponding to almost 300 000 t).

From the meat sector, the most important product for exports to the Sahel region is poultry (including eggs), for which the bulk of the exported product is frozen meat (39 000 t in 2021). With regard to the four meats together (beef, pigmeat, poultry and sheep and goat), more than 48 000 t of frozen meat have been exported to this countries.

Concerning EU imports from this region, the category of products including coffee, tea, cocoa and spices represents the highest import value (€ 1.1 billion), accounting for 68% of total EU import value. 80% of this category is cocoa beans imports. The second largest category is fruit and nuts, for which EU imported € 248 million. Bananas' imports rank first in this category (57%).

1. 2022 Global Report on Food Crises. Joint Analysis for better decisions.

TABLE 1

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Feb21	Jan22-Feb22	Difference	
TOTAL AGRIFOOD	184 467	198 062	100%	28 522	32 414	3 893	14%
United Kingdom	41 960	41 926	21%	5 390	6 626	1 236	23%
United States	21 447	24 507	12%	3 169	3 979	810	26%
Japan	6 984	7 384	4%	1 062	1 328	266	25%
Switzerland	9 030	9 844	5%	1 467	1 721	254	17%
Korea, Republic of	3 029	3 940	2%	508	718	211	42%
Lebanon	641	534	0%	131	97	- 34	-26%
Libya	868	932	0%	179	129	- 50	-28%
Saudi Arabia	4 305	3 630	2%	646	582	- 64	-10%
Hong Kong	2 541	2 157	1%	329	246	- 83	-25%
China	17 684	17 137	9%	2 978	2 143	- 836	-28%
Other countries	75 976	86 071	43%	12 663	14 847	2 183	17%

TABLE 2

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Feb21	Jan22-Feb22	Difference	
TOTAL AGRIFOOD	184 467	198 062	100%	28 522	32 414	3 893	14%
United Kingdom	41 960	41 926	21%	5 390	6 626	1 236	23%
United States	21 447	24 507	12%	3 169	3 979	810	26%
China	17 684	17 137	9%	2 978	2 143	- 836	-28%
Switzerland	9 030	9 844	5%	1 467	1 721	254	17%
Russian Federation	6 841	7 355	4%	1 163	1 344	182	16%
Japan	6 984	7 384	4%	1 062	1 328	266	25%
Norway	4 844	5 406	3%	813	864	51	6%
Korea, Republic of	3 029	3 940	2%	508	718	211	42%
Turkey	3 061	3 562	2%	580	683	103	18%
Canada	3 637	4 048	2%	544	665	120	22%
Saudi Arabia	4 305	3 630	2%	646	582	- 64	-10%
Australia	3 188	3 299	2%	477	559	82	17%
Morocco	2 165	2 366	1%	409	532	122	30%
Ukraine	2 841	3 107	2%	485	521	36	7%
Israel	2 141	2 648	1%	360	477	116	32%
Other countries	51 309	57 902	29%	8 471	9 674	1 203	14%

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-Feb21	Jan22-Feb22	Difference	
TOTAL AGRIFOOD	184 467	198 062	100%	28 522	32 414	3 893	14%
Wine and wine based products	13 452	16 624	8%	1 921	2 364	443	23%
Cereal preparations and milling products	18 779	18 803	9%	2 724	3 120	397	15%
Dairy products	15 988	17 012	9%	2 361	2 756	395	17%
Mixed food preparations and ingredients	11 208	12 264	6%	1 758	2 134	376	21%
Spirits and liqueurs	6 820	8 406	4%	1 016	1 304	288	28%
Fruit and nuts	6 026	5 714	3%	911	956	45	5%
Oilseeds and cakes	1 764	2 149	1%	427	459	33	8%
Sugar and isoglucose	556	596	0%	91	109	19	21%
Sheep and goat	617	575	0%	85	103	18	22%
Pigmeat	15 111	14 525	7%	2 539	2 029	- 510	-20%
Other products	94 147	101 394	51%	14 690	17 079	2 388	16%

TABLE 4

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Feb21	Jan22-Feb22	Difference	
TOTAL AGRIFOOD	184 467	198 062	100%	28 522	32 414	3 893	14%
Cereal preparations and milling products	18 779	18 803	9%	2 724	3 120	397	15%
Dairy products	15 988	17 012	9%	2 361	2 756	395	17%
Wine and wine based products	13 452	16 624	8%	1 921	2 364	443	23%
Cereals	11 414	12 002	6%	1 922	2 182	259	13%
Mixed food preparations and ingredients	11 208	12 264	6%	1 758	2 134	376	21%
Pigmeat	15 111	14 525	7%	2 539	2 029	- 510	-20%
Beer, cider and other beverages	9 713	10 012	5%	1 349	1 593	243	18%
Confectionery and chocolate	7 887	8 889	4%	1 203	1 439	236	20%
Preparations of fruit, nuts and vegetables	8 061	8 409	4%	1 186	1 386	200	17%
Vegetables	7 361	7 395	4%	1 265	1 311	47	4%
Spirits and liqueurs	6 820	8 406	4%	1 016	1 304	288	28%
Pet food and forage crops	6 505	7 342	4%	1 063	1 237	174	16%
Other animal products	6 510	7 531	4%	960	1 161	202	21%
Coffee, tea, cocoa and spices	5 932	6 176	3%	931	1 062	131	14%
Fruit and nuts	6 026	5 714	3%	911	956	45	5%
Other products	33 701	36 959	19%	5 414	6 380	966	18%

TABLE 5

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			<i>Difference</i>
	2020	2021	<i>Share 2021</i>	Jan21-Feb21	Jan22-Feb22		
TOTAL AGRIFOOD	121 595	130 150	100%	18 139	24 290	6 151	34%
Ukraine	5 837	6 930	5%	978	1 920	942	96%
United Kingdom	15 681	11 838	9%	1 176	2 052	876	75%
Brazil	11 362	13 544	10%	1 348	2 191	843	62%
China	5 128	6 096	5%	860	1 418	558	65%
United States	9 587	9 259	7%	1 834	2 164	329	18%
South Africa	2 189	2 291	2%	324	303	- 20	-6%
Chile	1 985	1 941	1%	309	286	- 23	-7%
Côte d'Ivoire	3 302	3 340	3%	577	528	- 49	-8%
Nigeria	477	655	1%	121	65	- 55	-46%
Canada	3 131	2 830	2%	563	437	- 126	-22%
Other countries	62 917	71 426	55%	10 049	12 925	2 876	29%

TABLE 6

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			<i>Difference</i>
	2020	2021	<i>Share 2021</i>	Jan21-Feb21	Jan22-Feb22		
TOTAL AGRIFOOD	121 595	130 150	100%	18 139	24 290	6 151	34%
Brazil	11 362	13 544	10%	1 348	2 191	843	62%
United States	9 587	9 259	7%	1 834	2 164	329	18%
United Kingdom	15 681	11 838	9%	1 176	2 052	876	75%
Ukraine	5 837	6 930	5%	978	1 920	942	96%
China	5 128	6 096	5%	860	1 418	558	65%
Turkey	4 652	5 031	4%	784	973	189	24%
Indonesia	4 334	5 610	4%	653	888	235	36%
Argentina	4 378	5 190	4%	586	792	206	35%
Switzerland	4 596	4 521	3%	671	753	82	12%
Morocco	2 471	2 627	2%	506	651	145	29%
Côte d'Ivoire	3 302	3 340	3%	577	528	- 49	-8%
Australia	1 155	1 900	1%	219	514	296	135%
India	2 364	2 919	2%	429	512	83	19%
Peru	2 425	2 708	2%	436	510	75	17%
Russian Federation	1 785	2 176	2%	290	507	218	75%
Other countries	42 538	46 461	36%	6 793	7 917	1 123	17%

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-Feb21	Jan22-Feb22	Difference	
TOTAL AGRIFOOD	121 595	130 150	100%	18 139	24 290	6 151	34%
Oilseeds and cakes	15 114	18 276	14%	2 617	3 417	800	31%
Cereals	5 771	6 179	5%	857	1 648	791	92%
Coffee, tea, cocoa and spices	15 944	17 061	13%	2 556	3 300	744	29%
Vegetable oils (oilseeds and palm)	6 712	8 230	6%	957	1 635	678	71%
Non-edible for technical use	5 841	7 473	6%	870	1 462	593	68%
Sheep and goat	1 011	940	1%	102	152	50	49%
Tobacco, cigars and cigarettes	2 468	2 299	2%	401	438	38	9%
Sugar and isoglucose	843	878	1%	117	152	35	30%
Pigmeat	415	293	0%	38	49	11	29%
Olives and olive oil	751	636	0%	103	97	- 6	-5%
Other products	66 724	67 885	52%	9 521	11 939	2 417	25%

TABLE 8

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Feb21	Jan22-Feb22	Difference	
TOTAL AGRIFOOD	121 595	130 150	100%	18 139	24 290	6 151	34%
Oilseeds and cakes	15 114	18 276	14%	2 617	3 417	800	31%
Coffee, tea, cocoa and spices	15 944	17 061	13%	2 556	3 300	744	29%
Fruit and nuts	21 050	20 697	16%	3 176	3 248	72	2%
Cereals	5 771	6 179	5%	857	1 648	791	92%
Vegetable oils (oilseeds and palm)	6 712	8 230	6%	957	1 635	678	71%
Non-edible for technical use	5 841	7 473	6%	870	1 462	593	68%
Mixed food preparations and ingredients	5 182	5 586	4%	734	1 046	313	43%
Preparations of fruit, nuts and vegetables	5 412	5 421	4%	808	954	146	18%
Vegetables	4 146	4 278	3%	739	925	186	25%
Other animal products	4 658	4 646	4%	622	878	256	41%
Cereal preparations and milling products	3 757	3 852	3%	499	759	260	52%
Margarine and other oils and fats (vegetables)	3 023	3 924	3%	539	704	165	31%
Spirits and liqueurs	3 061	3 303	3%	281	563	282	101%
Pet food and forage crops	2 705	2 749	2%	384	530	146	38%
Tobacco, cigars and cigarettes	2 468	2 299	2%	401	438	38	9%
Other products	16 748	16 177	12%	2 100	2 782	682	32%

TABLE 9

AGRI-FOOD TRADE BALANCE (MILLION EUR)

TRADE BALANCE			
PRODUCT/PERIOD	Exports Jan22-Feb22	Imports Jan22-Feb22	Trade balance Jan22-Feb22
	million EUR		
TOTAL AGRIFOOD	32 414	24 290	8 125
Beef and veal	633	330	304
Pigmeat	2 029	49	1 980
Poultry and eggs	789	267	522
Sheep and goat	103	152	- 49
Dairy products	2 756	330	2 426
Other animal products	1 161	878	283
Cereals	2 182	1 648	534
Cereal preparations and milling products	3 120	759	2 361
Oilseeds and protein crops	459	3 417	-2 958
Vegetable oils (oilseeds and palm)	487	1 635	-1 148
Margarine and other oils and fats (vegetable)	325	704	- 379
Sugar and isoglucose	109	152	- 42
Confectionery and chocolate	1 439	419	1 020
Vegetables	1 311	925	386
Fruit	956	3 248	-2 292
Preparations of fruit, nuts and vegetables	1 386	954	432
Olives and olive oil	684	97	586
Wine and wine based products	2 364	254	2 109
Spirits and liqueurs	1 304	563	741
Beer, cider and other beverages	1 593	293	1 300
Coffee, tea, cocoa and spices	1 062	3 300	-2 238
Mixed food preparations and ingredients	2 134	1 046	1 088
Pet food and forage crops	1 237	530	707
Tobacco, cigars and cigarettes	926	438	488
Horticulture	820	401	419
Non-edible for technical use	796	1 462	- 667
Unspecified	248	38	210



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