



European
Commission



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS IN AUGUST 2022

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Note to the reader

The latest available consolidated trade data at EU level cover market developments until August 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 EXPORTS BOOSTED IN AUGUST 2022, IMPROVING TRADE BALANCE

Both EU agri-food exports and imports climbed in August, in value terms. EU monthly trade flows reached their highest point for 2022, at EUR 35 billion. **EU trade balance** in August slightly improved compared to July, **at EUR 5.6 billion**, and is also the highest value in 2022.

EU **exports** reached **EUR 20.3 billion** in August 2022. This corresponds to a 6% increase compared to July 2022. Compared to August 2021, this is still 27% higher even if prices started to go up already at this period of 2021 for certain commodities. With the fresh 2022 harvest of wheat, EU export values increased significantly in particular to MENA region (+40% compared to August 2021) and sub-Saharan Africa (+80%).

EU **imports** expanded and reached **EUR 14.7 billion** in August 2022, a 3% increase compared to the previous month. EU maize imports have particularly increased in August 2022, following hot and dry conditions in the EU and reached 2.8 million t, mainly coming from Brazil and Ukraine.

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



Source: Comext



EU AGRI-FOOD EXPORTS

EU EXPORTS TO MENA REGION CONTINUE TO INCREASE

In August 2022, EU agri-food exports increased (by 6% month-to-month) in value terms. The most important trade partners in August were the United Kingdom, the US and China. While monthly export value to the US remained stable, EU exports to China decreased (-3%) and the exports to the UK increased (+2%).

EU top export products to the US in August were wine (17% of EU agri-food exports, in value), spirits and liqueurs (15%) and cereal preparations (9%). In August, EU wine exports slightly recessed (-EUR 48.9 million compared to July), while spirits and liqueurs and cereal preparations increased by EUR 11.4 million and EUR 5 million, respectively.

Regarding trade with China in August 2022, the EU mainly exported pigmeat (mostly frozen meat and offal), cereal preparations and dairy products. Despite the general decline in 2022, exports of pigmeat in August reached EUR 321 million (EUR 293 million in August 2021).

Trade developments in January-August 2022

Compared to the same period in 2021, the most significant increases of EU exports were recorded for the UK (+EUR 4.4 billion), US (+EUR 3.4 billion) and Morocco (+EUR 1.2 billion). In total, the EU exported EUR 148 billion of agri-food products from January to August 2022. This corresponds to 75% of the value of total 2021 exports.

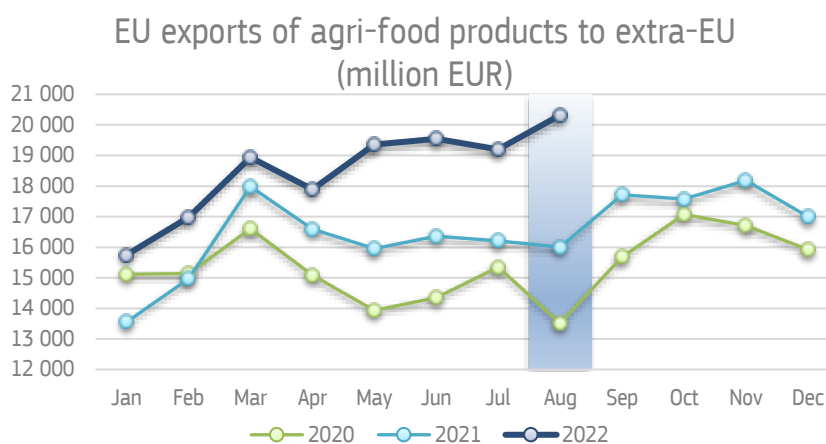
DYNAMIC EXPORTS OF CEREALS PREPARATIONS AND WHEAT

The biggest export values in August were for cereal preparations (EUR 1.7 billion), wheat (EUR 1.6 billion) and wine (EUR 1.4 billion).

EU exports of cereal preparations are going primarily to the United Kingdom, China and the United States. These countries represent close to 55% of the EU exports in cereals preparations. The EU also exports large amounts to the MENA region (11% of total volumes exported) and to sub-Saharan Africa (6%).

Large shares of EU wheat exports are going to the MENA region and to sub-Saharan Africa. In August only, 2 million tons of wheat reached the MENA region (48% of total EU wheat exports) and 1.5 million tons arrived in sub-Saharan Africa (34% of total EU wheat exports).

EU wine exports reached EUR 1.4 billion in August (-EUR 177 million compared to exports in July). Trade in August declined to almost all destinations month-to-month, but was still above the trade in August 2021 (+13%). Since the beginning of the year 2022, the EU exported EUR 11.4 billion of wine. North America is by far the largest importing region, totalling 36% of total EU exports. European neighbours of the EU (United Kingdom, Switzerland and Norway) account for 27% of EU exports.



EU AGRI-FOOD IMPORTS

SUBSTANTIAL INCREASE OF IMPORTS FROM UKRAINE

EU imports increased by 3% in August 2022 compared to previous month and reached EUR 14.7 billion. The EU mainly imported from Brazil (EUR 1.9 billion), the United Kingdom (EUR 1.3 billion) and Ukraine (EUR 1.1 billion).

EU imports from **Ukraine** increased by 19% in August compared to July, mainly due to increased imports of rapeseed (+469%) and wheat (+246%) in value terms. This was largely due to an increase in volumes imported in the EU (+300 thousand t of rapeseed and +112 thousand t of wheat). On the contrary, EU imports of sunflower seeds declined by 42% while sunflower oil imports increased mildly (+2%), suggesting a lower crushing margin over the month.

Imports from **Brazil** remained stable in August compared to July, in value terms. This is due to a sharp increase of maize and raw sugar imports (+144% and +249%, respectively), contrasted by a decrease for soya beans and juices (-58% and -16%, respectively).

Trade developments in January-August 2022

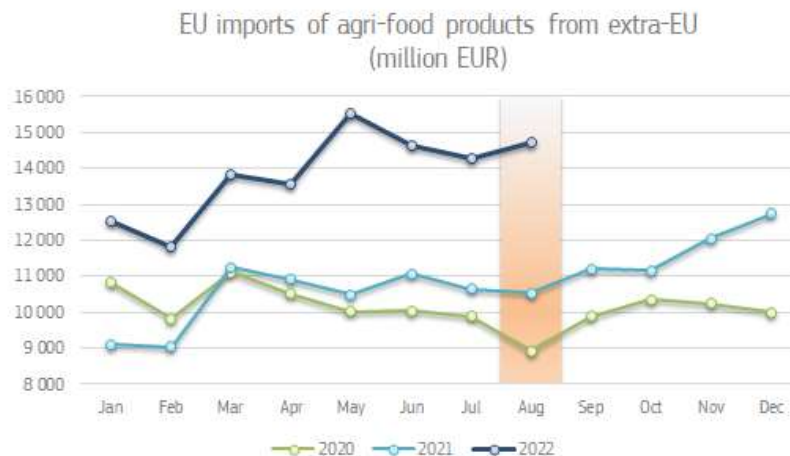
Total EU imports from January to August 2022 reached EUR 110.9 billion, corresponding to 85% of the annual imports in 2021. The biggest increase has been registered for Brazil (+EUR 4 billion), Ukraine (+EUR 2.8 billion) and the UK (+EUR 2.5 billion).

EU imports from **Türkiye** increased by 13% in the period January-August 2022 compared to previous year (in value terms). The biggest increase has been for tomatoes (+EUR 51 million), cereals preparations (+EUR 32 million) and plant fibres (+EUR 26 million). In volumes terms, wheat imports almost doubled while citrus, nuts and juices have significantly increased as well.

EU MAIZE IMPORTS BOOMED IN AUGUST

EU **maize** imports rose significantly in August. In volume terms, imports increased by 77% month-to-month to reach 2.8 million t. This increase is primarily due to the reduction of EU domestic production due to the drought all across the continent. The EU mainly imported from Brazil, Ukraine and Serbia, but also from the UK and Russia.

For **oilseed products**, the EU imported slightly less volumes of rapeseed in August compared to July, but with a significant increase of imports from Ukraine (and less from Australia and Canada). The EU imported significantly less sunflower (-41%) as well as less soya beans (-40%). Regarding oilseed meals, the EU imported in August more rapeseed and soya meals but slightly less sunflower meal.



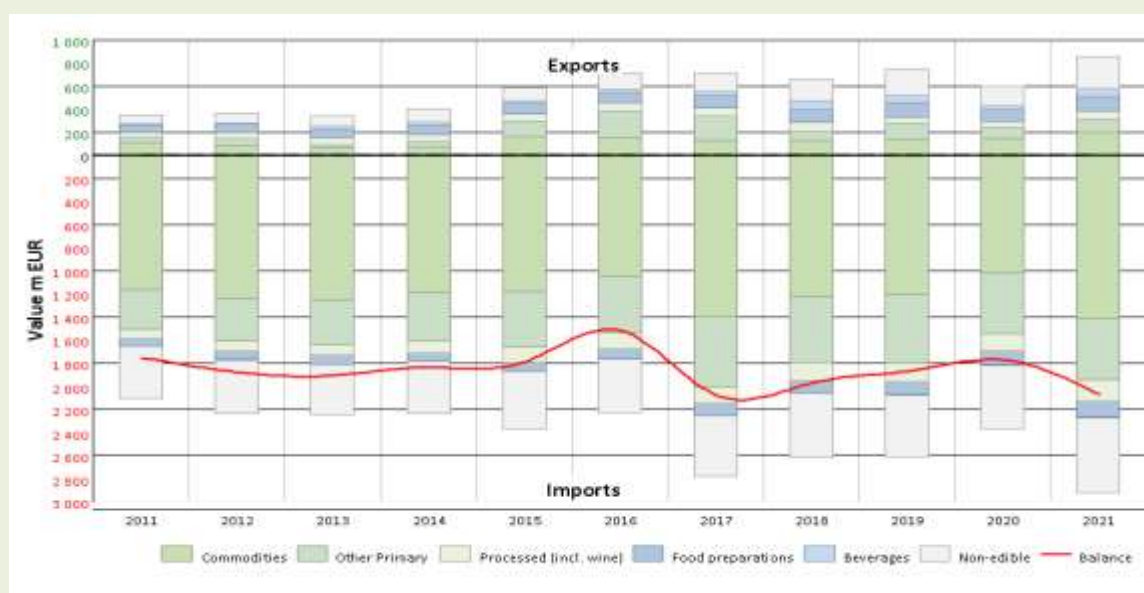
FOCUS

EU trade with India in 2021 and in January-July 2022

India is one of the largest trade partner for EU. The EU and India, following the common strategy to deepen cooperation¹, have been continuing expanding their trade in agri-food market, aiming to gain sustainability in trading and economies. Global food security crisis was one of the issue India decided to tackle by promoting new ways of nutrition and intensive support of grain cultivation such as millets.

EU-INDIA agri-food trade state of play in 2021

The EU is a net importer in agri-food *vis-à-vis* India. In 2021, the most exported goods to India were plant fibers (EUR 96 million). Dairy products (mainly lactose) and fruit and nuts (mostly apple and pears) completed the top three with EUR 66 million and EUR 63 million. On the import side, the most imported products are coffee, tea, cocoa and spices (EUR 521 million). Rice is also a significant product imported from India (EUR 166 million) as well as raw tobacco (EUR 161 million). In 2021, soya meal imports were significantly up in value terms (EUR 324 million, +685% compared to 2020).



Trade in January-August 2022

EU Exports. During the first 8 months in 2022, EU exports to India increased substantially compared to 2021 – from EUR 500 million to EUR 761 million. In January-August 2022, the highest export values were vegetable oils (+EUR 83.5 million). The EU supplied to India 63 thousand tons of oils, which is almost four times higher than in 2021. Particularly, the EU exported soya oil (30 thousand tons) and sunflower oil (33 thousand tons). On the contrary, there was a significant drop in the amount of cereals exported to India in 2022 (-10 thousand tons).

EU Imports. During this period in 2022, imports depicted an increasing trend between the EU and India (from EUR 2 billion to EUR 2.5 billion). This was mainly due to an increased import value for coffee (+EUR 123 million, with increased import volumes), margarine and other oils (+EUR 82 million) and mixed food preparations (+EUR 61 million). On the contrary, the import of soya cakes (-367 thousand tons) and soya seeds (-6 thousand tons) have dropped in this period in 2022. The decrease in EU imports of non-edible products particularly plant fibres (e.g. cotton, jute plants) is significant (-16.7 thousand tons) as well, though the value of its import has peaked from EUR 89.5 million to EUR 131.1 million.

¹European Commission, Directorate-General for International Cooperation and Development, EU strategy on India, Publications Office, 2019, <https://data.europa.eu/doi/10.2841/43152>

TABLE 1

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Aug21	Jan22-Aug22	Difference	
TOTAL AGRIFOOD	184 468	198 054	100%	127 599	147 986	20 388	16%
United Kingdom	41 963	41 903	21%	26 678	31 077	4 399	16%
United States	21 447	24 510	12%	15 905	19 286	3 380	21%
Morocco	2 165	2 366	1%	1 541	2 719	1 178	76%
Switzerland	9 030	9 852	5%	6 457	7 311	854	13%
Egypt	1 694	2 184	1%	1 173	1 814	641	55%
Thailand	1 019	1 223	1%	871	749	- 122	-14%
Cambodia	252	419	0%	333	150	- 183	-55%
Hong Kong	2 541	2 158	1%	1 430	1 164	- 266	-19%
Russian Federation	6 841	7 348	4%	4 591	4 199	- 392	-9%
China	17 684	17 137	9%	12 013	9 574	- 2 439	-20%
Other countries	79 833	88 955	45%	56 607	69 944	13 337	24%

TABLE 2

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Aug21	Jan22-Aug22	Difference	
TOTAL AGRIFOOD	184 468	198 054	100%	127 599	147 986	20 388	16%
United Kingdom	41 963	41 903	21%	26 678	31 077	4 399	16%
United States	21 447	24 510	12%	15 905	19 286	3 380	21%
China	17 684	17 137	9%	12 013	9 574	- 2 439	-20%
Switzerland	9 030	9 852	5%	6 457	7 311	854	13%
Japan	6 984	7 379	4%	4 812	5 384	573	12%
Russian Federation	6 841	7 348	4%	4 591	4 199	- 392	-9%
Norway	4 844	5 408	3%	3 540	3 878	338	10%
Canada	3 637	4 048	2%	2 555	3 105	550	22%
Korea, Republic of	3 029	3 939	2%	2 514	3 100	587	23%
Saudi Arabia	4 305	3 630	2%	2 368	2 928	560	24%
Morocco	2 165	2 366	1%	1 541	2 719	1 178	76%
Algeria	2 989	2 950	1%	1 956	2 550	594	30%
Türkiye	3 061	3 569	2%	2 174	2 530	355	16%
Australia	3 188	3 300	2%	2 097	2 507	410	20%
Israel	2 141	2 648	1%	1 668	2 065	396	24%
Other countries	51 160	58 068	29%	36 729	45 774	9 044	25%

TABLE 3

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2020	2021	Share 2021	Jan21-Aug21	Jan22-Aug22		
TOTAL AGRIFOOD	184 468	198 054	100%	127 599	147 986	20 388	16%
Cereals	11 414	12 002	6%	7 331	11 494	4 163	57%
Cereal preparations and milling products	18 779	18 808	9%	11 973	14 489	2 516	21%
Dairy products	15 988	16 988	9%	11 169	13 326	2 157	19%
Mixed food preparations and ingredients	11 208	12 259	6%	7 935	9 633	1 697	21%
Preparations of fruit, nuts and vegetables	8 060	8 410	4%	5 305	6 484	1 179	22%
Tobacco, cigars and cigarettes	5 606	5 511	3%	3 640	3 821	181	5%
Sheep and goat	617	575	0%	420	497	77	18%
Sugar and isoglucose	555	596	0%	344	382	38	11%
Horticulture	3 868	4 619	2%	3 128	3 042	- 86	-3%
Pigmeat	15 110	14 517	7%	10 152	8 842	-1 310	-13%
Other products	93 262	103 769	52%	66 200	75 976	9 776	15%

TABLE 4

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			Difference
	2020	2021	Share 2021	Jan21-Aug21	Jan22-Aug22		
TOTAL AGRIFOOD	184 468	198 054	100%	127 599	147 986	20 388	16%
Cereal preparations and milling products	18 779	18 808	9%	11 973	14 489	2 516	21%
Dairy products	15 988	16 988	9%	11 169	13 326	2 157	19%
Wine and wine based products	13 452	16 640	8%	10 624	11 714	1 090	10%
Cereals	11 414	12 002	6%	7 331	11 494	4 163	57%
Mixed food preparations and ingredients	11 208	12 259	6%	7 935	9 633	1 697	21%
Pigmeat	15 110	14 517	7%	10 152	8 842	- 1 310	-13%
Beer, cider and other beverages	9 713	9 994	5%	6 607	7 228	620	9%
Preparations of fruit, nuts and vegetables	8 060	8 410	4%	5 305	6 484	1 179	22%
Spirits and liqueurs	6 820	8 411	4%	5 414	6 441	1 027	19%
Confectionery and chocolate	7 886	8 886	4%	5 356	6 258	903	17%
Pet food and forage crops	6 506	7 357	4%	4 757	5 597	840	18%
Other animal products	6 510	7 528	4%	4 939	5 173	234	5%
Vegetables	7 361	7 399	4%	4 676	5 055	378	8%
Coffee, tea, cocoa and spices	5 932	6 175	3%	3 990	4 717	728	18%
Tobacco, cigars and cigarettes	5 606	5 511	3%	3 640	3 821	181	5%
Other products	34 122	37 168	19%	23 729	27 714	3 985	17%

TABLE 5

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Aug21	Jan22-Aug22	Difference	
TOTAL AGRIFOOD	121 598	130 038	100%	82 886	110 942	28 056	34%
Brazil	11 362	13 539	10%	9 179	13 289	4 110	45%
Ukraine	5 837	6 913	5%	3 735	6 501	2 766	74%
United Kingdom	15 684	11 867	9%	7 200	9 694	2 494	35%
China	5 128	6 105	5%	3 697	6 191	2 494	67%
United States	9 587	9 247	7%	5 798	7 946	2 148	37%
Ghana	1 240	1 336	1%	874	864	- 10	-1%
Guyana	85	87	0%	64	52	- 12	-19%
Cuba	176	176	0%	131	118	- 13	-10%
Canada	3 131	2 831	2%	1 692	1 631	- 61	-4%
Nigeria	477	648	0%	462	358	- 104	-23%
Other countries	68 892	77 289	59%	50 053	64 299	14 246	28%

TABLE 6

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan21-Aug21	Jan22-Aug22	Difference	
TOTAL AGRIFOOD	121 598	130 038	100%	82 886	110 942	28 056	34%
Brazil	11 362	13 539	10%	9 179	13 289	4 110	45%
United Kingdom	15 684	11 867	9%	7 200	9 694	2 494	35%
United States	9 587	9 247	7%	5 798	7 946	2 148	37%
Ukraine	5 837	6 913	5%	3 735	6 501	2 766	74%
China	5 128	6 105	5%	3 697	6 191	2 494	67%
Argentina	4 378	5 174	4%	3 245	4 383	1 139	35%
Indonesia	4 334	5 648	4%	3 446	4 064	618	18%
Türkiye	4 652	5 032	4%	3 127	3 548	422	13%
Switzerland	4 596	4 522	3%	2 857	3 115	258	9%
Australia	1 155	1 901	1%	1 436	3 007	1 571	109%
India	2 364	2 920	2%	2 002	2 502	500	25%
Morocco	2 471	2 637	2%	1 872	2 399	527	28%
Côte d'Ivoire	3 302	3 255	3%	2 257	2 388	130	6%
Malaysia	2 249	2 656	2%	1 598	2 275	677	42%
Viet Nam	2 168	2 221	2%	1 398	2 269	871	62%
Other countries	42 331	46 400	36%	30 038	37 371	7 333	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-Aug21	Jan22-Aug22	Difference	
TOTAL AGRIFOOD	121 598	130 038	100%	82 886	110 942	28 056	34%
Oilseeds and protein crops	15 115	18 249	14%	11 924	17 083	5 159	43%
Coffee, tea, cocoa and spices	15 944	16 934	13%	10 823	14 536	3 713	34%
Non-edible for technical use	5 841	7 485	6%	4 404	7 556	3 151	72%
Cereals	5 771	6 178	5%	3 986	6 869	2 883	72%
Vegetable oils (oilseeds and palm)	6 712	8 232	6%	4 923	7 168	2 245	46%
Sugar and isoglucose	831	863	1%	502	660	159	32%
Horticulture	1 688	1 924	1%	1 282	1 438	156	12%
Wine and wine based products	1 775	1 663	1%	998	1 144	145	15%
Olives and olive oil	751	636	0%	404	492	87	22%
Pigmeat	415	293	0%	186	240	54	29%
Other products	66 754	67 580	52%	43 454	53 757	10 303	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-Aug21	Jan22-Aug22	Difference	
TOTAL AGRIFOOD	121 598	130 038	100%	82 886	110 942	28 056	34%
Oilseeds and protein crops	15 115	18 249	14%	11 924	17 083	5 159	43%
Fruit and nuts	21 050	20 704	16%	13 716	14 956	1 240	9%
Coffee, tea, cocoa and spices	15 944	16 934	13%	10 823	14 536	3 713	34%
Non-edible for technical use	5 841	7 485	6%	4 404	7 556	3 151	72%
Vegetable oils (oilseeds and palm)	6 712	8 232	6%	4 923	7 168	2 245	46%
Cereals	5 771	6 178	5%	3 986	6 869	2 883	72%
Mixed food preparations and ingredients	5 182	5 587	4%	3 582	4 538	956	27%
Preparations of fruit, nuts and vegetables	5 412	5 416	4%	3 497	4 159	662	19%
Other animal products	4 660	4 666	4%	2 849	3 845	995	35%
Margarine and other oils and fats (vegetable)	3 023	3 930	3%	2 469	3 518	1 049	42%
Vegetables	4 146	4 278	3%	2 859	3 422	564	20%
Cereal preparations and milling products	3 759	3 852	3%	2 445	3 137	692	28%
Spirits and liqueurs	3 060	3 293	3%	1 937	2 717	781	40%
Pet food and forage crops	2 705	2 759	2%	1 750	2 311	561	32%
Tobacco, cigars and cigarettes	2 468	2 305	2%	1 526	2 090	564	37%
Other products	16 749	16 168	12%	10 197	13 038	2 841	28%

TABLE 9

AGRI-FOOD TRADE BALANCE (MILLION EUR)

TRADE BALANCE			
PRODUCT/PERIOD	Exports Jan22- Aug22	Imports Jan22- Aug22	Trade balance Jan22-Aug22
	million EUR		
TOTAL AGRIFOOD	147 986	110 942	37 044
Dairy products	13 326	1 594	11 732
Cereal preparations and milling products	14 489	3 137	11 352
Wine and wine based products	11 714	1 144	10 571
Pigmeat	8 842	240	8 603
Beer, cider and other beverages	7 228	1 572	5 656
Mixed food preparations and ingredients	9 633	4 538	5 095
Cereals	11 494	6 869	4 625
Confectionery and chocolate	6 258	1 713	4 545
Spirits and liqueurs	6 441	2 717	3 724
Pet food and forage crops	5 597	2 311	3 286
Olives and olive oil	3 294	492	2 802
Preparations of fruit, nuts and vegetables	6 484	4 159	2 325
Poultry and eggs	3 757	1 455	2 302
Tobacco, cigars and cigarettes	3 821	2 090	1 730
Vegetables	5 055	3 422	1 633
Horticulture	3 042	1 438	1 604
Other animal products	5 173	3 845	1 328
Unspecified	1 320	116	1 204
Beef and veal	2 790	1 723	1 067
Sugar and isoglucose	382	660	- 278
Sheep and goat	497	879	- 382
Margarine and other oils and fats (vegetable)	1 507	3 518	-2 011
Non-edible for technical use	3 075	7 556	-4 481
Vegetable oils (oilseeds and palm)	2 612	7 168	-4 556
Coffee, tea, cocoa and spices	4 717	14 536	-9 818
Fruit and nuts	3 818	14 956	-11 137
Oilseeds and protein crops	1 619	17 083	-15 464



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