



European
Commission



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS IN JANUARY 2022

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CONTENTS

HIGHLIGHTS

EU AGRI-FOOD EXPORTS

EU AGRI-FOOD IMPORTS

TABLES

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Disclaimer

This edition of the EU agri-food trade newsletter features a new aggregation of products into 27 categories with the objective to better represent the different sectors of agricultural production.

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

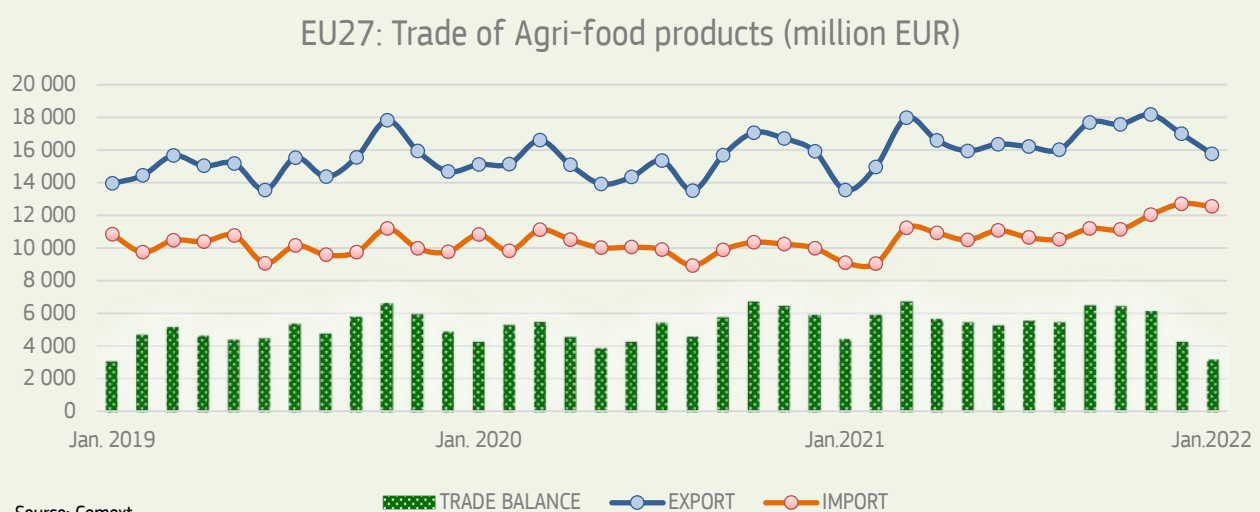
The trade figures are all expressed in values, except when specifically mentioned. The current situation of high agri-food prices therefore plays an important role. An increase in trade values for a specific product must not necessarily correspond to an increase in volume for this product.

HIGHLIGHTS: VALUE OF IMPORTS WEIGHS ON EU AGRI-FOOD TRADE BALANCE IN JANUARY 2022

January 2022 has been categorized by a continuing trend of lower exports and higher imports initiated in the autumn of 2021. This resulted in a significant decrease of the EU trade balance (-50% compared to September 2021 trade balance), which is slightly above the normal seasonal variation.

In January 2022, EU agri-food trade (exports plus imports) reached a value of **€28.3 billion**; +25% compared to last year in January, in the middle of a COVID wave, but also +16% compared to the 3-year average.

EU exports reached **€15.8 billion**, +16% compared to last year. EU imports stood up at **€12.5 billion**, +38% compared to January 2021. These trade flows are rather high when compared to pre-COVID levels: +11% for exports and +22% for imports compared to the 3-year average.



EU AGRI-FOOD EXPORTS

EU EXPORTS TO THE UK AND U.S. SIGNIFICANTLY ABOVE JAN-2021 LEVELS

EU agri-food exports in January 2022 were primarily sent to the United Kingdom, the U.S. and China. These three countries counted for 40% of total EU agri-food exports. While the export values to the United Kingdom and the U.S. increased substantially year-to-year (*i.e.* compared to January 2021), the value of exports to China decreased substantially (-28% year-to-year).

In terms of EU exports to the **UK**, January 2022 is categorized by a return to 2020 levels, after a decrease in 2021. This is particularly the case for poultry & eggs, vegetables and beer, cider & other beverages. Total EU export in Jan-2022 to the UK reached €3.4 billion (+36% compared to Jan-2021). Cereals exports to the UK expanded for two years in a row (+72% compared to Jan-2021). Other sectors managed to recover from last year low but did not reach Jan-2020 levels, e.g. sugar & isoglucose (+269% compared to Jan-2021).

EU exports to **the U.S.** increased by €323 m. Compared to Jan-2021, increases were the most significant for cereals (+461%) and poultry & eggs (+269%). Almost all sectors increased their export values to the U.S., except sheep & goat, sugar & isoglucose, olives & olive oil and tobacco, cigars & cigarettes.

In Jan-2022, before the Russian aggression against Ukraine, EU exports to **Russia** increased compared to the same month of last year. Cereals export increased by 197% and reached €37.5 m. At the same time, cereals imports from Russia amounted €25.0 m. In the large exporting sectors to Russia, mixed food preparations & ingredients increased the most (↑€14.4 m). Confectionery & chocolate as well as cereal preparations & milling products increased by €11.7 m and €7.3 m, respectively.

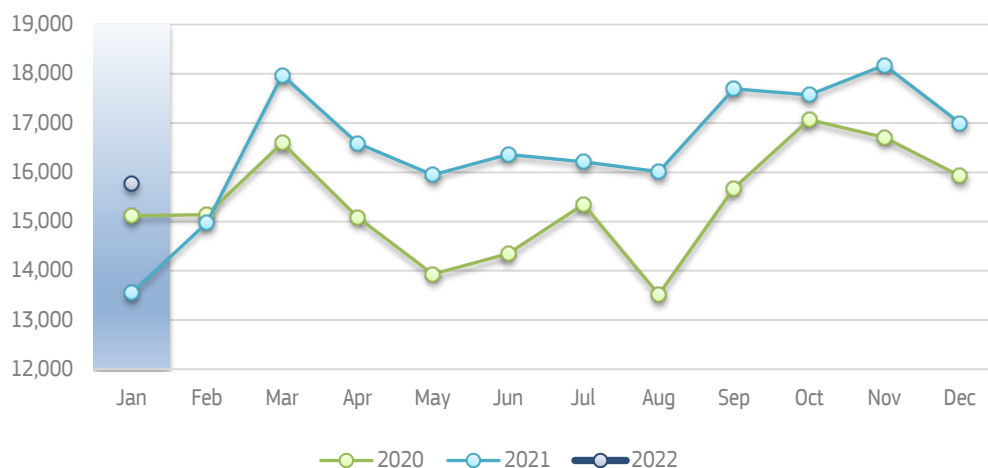
INCREASE OF €2.2 BILLION FOR EU EXPORTS COMPARED TO JAN-2021

The EU's top three agri-food export categories are **cereal preparations & milling products, dairy products** and **wine & wine-based products**. They represented one fourth of EU export value in calendar year 2021. In January 2022, the three sectors increased their export values by €203 m, €219 m and €227 m, respectively. Also export values of cereals increased compared to Jan-2021 (↑€210 m).

In 2021, the highest trade surplus was recorded for dairy products (€15.3 billion), followed by wine & wine based products (€15.0 billion) and cereals preparations & milling products (€15.0 billion). Trade surplus for pigmeat reached €14.2 billion in 2021.

Still, **pigmeat** exports in Jan-2022 decreased by 19% compared to last year to reach €996 m. It remains the 4th top EU exporting sector.

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



EU AGRI-FOOD IMPORTS

HIGH FOOD PRICES RAISE AGRI-FOOD IMPORT VALUES IN JAN-2022

In January 2022, the U.S. was the first source of EU agri-food imports, closely followed by Brazil. Ukraine and the UK rank 3^d and 4th as top importing sources for the EU. These four countries represented 35% of EU agri-food imports.

Import values from **the United Kingdom** increased by 137% to reach slightly more than €1.0 billion in Jan-2022, compared to a low level in Jan-2021 (still 21% lower than Jan-2020). Only one product category decreased its import value compared to Jan-2021, namely fruit (↘€3.2 m, -54%). All other sectors increased their import value into the EU, especially wine & wine based products (↗€8.0 m, +327%) and poultry & eggs (↗€20.6 m, +220%).

In Jan-2022 (before Russia's aggression), EU imports from **Ukraine** increased by 88% compared to Jan-2021 to reach €1.0 billion. Almost all sectors recovered from the low level in Jan-2021 and some exceeded their Jan-2020 import values. This is particularly the case for cereals (↗€258.0 m, +136%) and fruit (↗€11.7 m, +85%). Import values in Jan-2022 continued to increase for the second year in a row for oilseeds & protein crops and vegetable oils to reach €124.7 m and €302.9 m.

EU imports from the **U.S.** increased by the 16% in Jan-2022 compared to Jan-2021. Dairy products

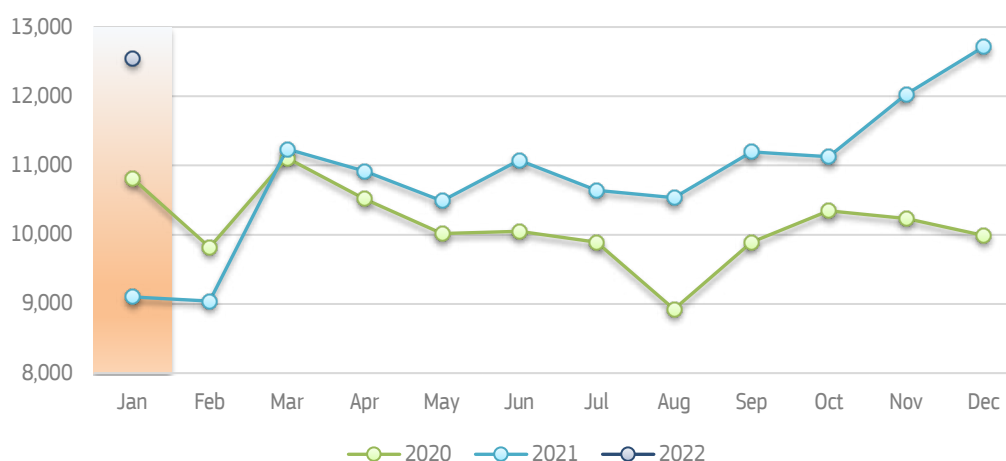
imports from the U.S. reached €3.0 m (+146% compared to Jan-2021). Spirits & liqueurs imports also increased substantially to reach a monthly import value of €49.6 m (+103% year-to-year). Oilseeds & protein crops have the highest imported value into the EU (€491.7 m, +6% year-to-year). Olives & olive oil imports into the EU decreased the most compared to Jan-2021 (-80%) and reached €8 000, compared to €41 000 in Jan-2021 and €124 000 in Jan-2020).

Imports from **China** also increased in Jan-2022 (↗€306 m, +67% year-to-year). This has been mainly driven by an increase in the import value of other animal products (mainly hides and wool) (+58% year-to-year), as well as non-edible product for technical use (primarily fatty acids and waxes) (+160% year-to-year).

OILSEEDS & PROTEIN CROPS AND FRUIT ON TOP OF EU IMPORTS

Oilseeds & protein crops represent 14% of total EU imports in 2021. In Jan-2022, the EU imported worth €1 761 m of these agricultural products. The import value of vegetable oils, representing 6% of total EU imports in 2021, increased by 89% year-to-year (mainly from an increase in rapeseed oil). **Fruit** imports worth €1 672 m in Jan-2022 (+6% year-to-year).

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



FOCUS

METHODOLOGICAL NOTE ON THE 27 AGRI-FOOD TRADE CATEGORIES

For some years, DG AGRI has been publishing monthly trade figures regarding agri-food products, covering the agri-food sector from raw agricultural commodities to the most refined food items. Agri-food trade was presented in 68 categories grouped by level of processing. As from this month, the agri-food products will be grouped into a reduced number of 27 categories in order to:

- Better align with sectorial market analysis and expand the use of trade value data;
- Focus on the main sectors of EU agri-food production and market developments with partner countries.

The description of trade flows will continue to be in values, while information on quantity will be provided when needed to grasp the underlying factors driving market developments.

The new categories are listed as follows:

For **animal products**, the new categories are divided by species and include live animals, meat, offal and meat preparations. They are split into “Beef & veal”, “Pigmeat”, “Poultry & eggs”, “Sheep & goat”, “Dairy products” and “Other animal products”.

For **arable crops**, “Cereals” is one category covering wheat, rice, maize and other coarse grains. Other categories include “Oilseeds & protein crops”, “Cereal preparations & milling products”, “Vegetable oils”, “Margarine & other oils and fats”. For the sugar sector, one category covers “Sugar & isoglucose”. Mixed food preparations, other than exclusive meat or cereals preparations will be under the category “Mixed food preparations & ingredients”.

“Fruit and nuts”, “Vegetables” and “Preparations of fruit, nuts and vegetables” are the three categories covering **fruit and vegetables** products. “Olives & olive oil” will be a separated category, as well as “Coffee, tea, cocoa and spices”.

To cover **beverages**, “Wine & wine based products”, “Spirits & liqueurs” and “Beer, cider and other beverages”.

For **non-edible agricultural products**, “Pet food & forage crops”, “Tobacco, cigars and cigarettes”, “Horticulture” and “Non-edible for technical use” will cover this segment of the agri-food trade.

While the total for EU agri-food trade remains the same, ranking of top exporting and importing product sectors presents as follows for calendar year 2021.

Top 5 exported product category (million EUR)		Top 5 imported product categories (million EUR)	
Cereals preparations & milling products	18 803	Fruit	20 696
Dairy products	17 011	Oilseeds & protein crops	18 241
Wine & wine based products	16 624	Coffee, tea, cocoa and spices	17 061
Pigmeat	14 528	Vegetable oils	8 225
Mixed food preparations and ingredients	12 263	Non-edible for technical use	7 471

TABLE 1

EU AGRI-FOOD EXPORTS – COUNTRIES WITH MOST IMPORTANT CHANGES (million EUR)

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	2020	2021	Share 2021	Jan. 2021	Jan. 2022	Difference	
TOTAL AGRIFOOD	184 467	198 065	100%	13 552	15 768	2 216	16%
United Kingdom	41 960	41 935	21%	2 488	3 382	894	36%
United States	21 447	24 504	12%	1 560	1 882	323	21%
Russian Federation	6 841	7 354	4%	522	659	137	26%
Switzerland	9 030	9 844	5%	701	827	126	18%
Egypt	1 694	2 181	1%	116	241	125	107%
Pakistan	337	415	0%	48	24	- 24	-51%
Lebanon	641	534	0%	68	42	- 26	-38%
Algeria	2 989	2 950	1%	221	177	- 45	-20%
Hong Kong	2 541	2 157	1%	175	116	- 59	-34%
China	17 684	17 135	9%	1 468	1 053	- 414	-28%
Other countries	79 303	89 055	45%	6 185	7 365	1 180	19%

TABLE 2

EU AGRI-FOOD EXPORTS - TOP 15 EXPORT COUNTRIES (million EUR)

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	2020	2021	Share 2021	Jan. 2021	Jan. 2022	Difference	
TOTAL AGRIFOOD	184 467	198 065	100%	13 552	15 768	2 216	16%
United Kingdom	41 960	41 935	21%	2 488	3 382	894	36%
United States	21 447	24 504	12%	1 560	1 882	323	21%
China	17 684	17 135	9%	1 468	1 053	- 414	-28%
Switzerland	9 030	9 844	5%	701	827	126	18%
Russian Federation	6 841	7 354	4%	522	659	137	26%
Japan	6 984	7 384	4%	520	634	114	22%
Norway	4 844	5 406	3%	402	407	5	1%
Korea, Republic of	3 029	3 940	2%	227	351	124	54%
Turkey	3 061	3 556	2%	277	324	47	17%
Canada	3 637	4 048	2%	275	318	43	16%
Saudi Arabia	4 305	3 630	2%	284	278	- 6	-2%
Morocco	2 165	2 365	1%	181	277	96	53%
Australia	3 188	3 299	2%	239	271	32	13%
Ukraine	2 841	3 107	2%	204	255	52	26%
Egypt	1 694	2 181	1%	116	241	125	107%
Other countries	51 756	58 376	29%	4 087	4 607	519	13%

TABLE 3

EU AGRI-FOOD EXPORTS – PRODUCT CATEGORIES WITH MOST IMPORTANT CHANGES (million EUR)

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan. 2021	Jan. 2022	Difference	
TOTAL AGRIFOOD	184 467	198 065	100%	13 552	15 768	2 216	16%
Wine and wine based products	13 452	16 624	8%	878	1 105	227	26%
Dairy products	15 988	17 011	9%	1 141	1 360	219	19%
Mixed food preparations and ingredients	11 208	12 263	6%	815	1 025	211	26%
Cereals	11 414	12 003	6%	863	1 073	210	24%
Cereal preparations and milling products	18 779	18 803	9%	1 309	1 511	203	15%
Sugar and isoglucose	556	596	0%	46	60	14	31%
Vegetable oils (oilseeds and palm)	1 985	2 812	1%	211	224	13	6%
Sheep and goat	617	575	0%	34	39	5	13%
Oilseeds and protein crops	1 764	2 149	1%	214	206	- 8	-4%
Pigmeat	15 111	14 528	7%	1 230	996	- 233	-19%
Other products	93 594	100 701	51%	6 812	8 167	1 355	20%

TABLE 4

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

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan. 2021	Jan. 2022	Difference	
TOTAL AGRIFOOD	184 467	198 065	100%	13 552	15 768	2 216	16%
Cereal preparations and milling products	18 779	18 803	9%	1 309	1 511	203	15%
Dairy products	15 988	17 011	9%	1 141	1 360	219	19%
Wine and wine based products	13 452	16 624	8%	878	1 105	227	26%
Cereals	11 414	12 003	6%	863	1 073	210	24%
Mixed food preparations and ingredients	11 208	12 263	6%	815	1 025	211	26%
Pigmeat	15 111	14 528	7%	1 230	996	- 233	-19%
Beer, cider and other beverages	9 713	10 012	5%	645	781	136	21%
Confectionery and chocolate	7 887	8 889	4%	576	707	130	23%
Preparations of fruit, nuts and vegetables	8 061	8 409	4%	562	696	133	24%
Vegetables	7 361	7 380	4%	631	680	49	8%
Spirits and liqueurs	6 820	8 406	4%	511	648	137	27%
Pet food and forage crops	6 505	7 342	4%	511	618	107	21%
Other animal products	6 510	7 531	4%	462	584	122	26%
Coffee, tea, cocoa and spices	5 932	6 176	3%	444	519	75	17%
Fruit	6 026	5 714	3%	444	479	35	8%
Other products	33 701	36 974	19%	2 531	2 987	456	18%

TABLE 5

EU AGRI-FOOD IMPORTS – COUNTRIES WITH MOST IMPORTANT CHANGES (million EUR)

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan. 2021	Jan. 2022	Difference	
TOTAL AGRIFOOD	121 595	130 100	100%	9 098	12 548	3 449	38%
United Kingdom	15 681	11 836	9%	435	1 034	598	137%
Ukraine	5 837	6 895	5%	553	1 042	489	88%
Brazil	11 362	13 544	10%	736	1 136	400	54%
China	5 128	6 093	5%	456	762	306	67%
Argentina	4 378	5 190	4%	210	428	218	104%
Chile	1 985	1 941	1%	161	150	- 11	-7%
Israel	746	790	1%	86	73	- 13	-15%
Nigeria	477	655	1%	55	28	- 27	-49%
Côte d'Ivoire	3 302	3 340	3%	296	253	- 43	-15%
Canada	3 131	2 830	2%	367	254	- 113	-31%
Other countries	69 568	76 984	59%	5 742	7 388	1 646	29%

TABLE 6

EU AGRI-FOOD IMPORTS - TOP 15 IMPORT COUNTRIES (million EUR)

AGRI-FOOD CATEGORIES	yearly data			monthly data			
	2020	2021	Share 2021	Jan. 2021	Jan. 2022	Difference	
TOTAL AGRIFOOD	121 595	130 100	100%	9 098	12 548	3 449	38%
United States	9 587	9 256	7%	977	1 139	161	16%
Brazil	11 362	13 544	10%	736	1 136	400	54%
Ukraine	5 837	6 895	5%	553	1 042	489	88%
United Kingdom	15 681	11 836	9%	435	1 034	598	137%
China	5 128	6 093	5%	456	762	306	67%
Turkey	4 652	5 031	4%	415	518	103	25%
Indonesia	4 334	5 606	4%	343	470	127	37%
Argentina	4 378	5 190	4%	210	428	218	104%
Switzerland	4 596	4 520	3%	320	381	60	19%
Morocco	2 471	2 627	2%	257	331	74	29%
Peru	2 425	2 708	2%	247	287	40	16%
Australia	1 155	1 900	1%	122	276	154	126%
India	2 364	2 919	2%	215	274	59	28%
Canada	3 131	2 830	2%	367	254	- 113	-31%
Côte d'Ivoire	3 302	3 340	3%	296	253	- 43	-15%
Other countries	41 191	45 804	35%	3 149	3 965	815	26%

TABLE 7

EU AGRI-FOOD IMPORTS – PRODUCT CATEGORIES WITH MOST IMPORTANT CHANGES (million EUR)

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	2020	2021	Share 2021	Jan. 2021	Jan. 2022	Difference	
TOTAL AGRIFOOD	121 595	130 100	100%	9 098	12 548	3 449	38%
Vegetable oils (oilseeds and palm)	6 712	8 225	6%	476	900	425	89%
Oilseeds and protein crops	15 114	18 241	14%	1 342	1 761	419	31%
Cereals	5 771	6 179	5%	492	895	402	82%
Coffee, tea, cocoa and spices	15 944	17 061	13%	1 313	1 654	341	26%
Non-edible for technical use	5 841	7 471	6%	416	755	339	82%
Sheep and goat	1 011	940	1%	53	76	23	43%
Pigmeat	415	293	0%	15	25	10	66%
Sugar and isoglucose	843	878	1%	58	63	5	8%
Tobacco, cigars and cigarettes	2 468	2 299	2%	198	199	1	1%
Olives and olive oil	751	636	0%	46	37	- 8	-18%
Other products	66 724	67 876	52%	4 690	6 182	1 492	32%

TABLE 8

EU AGRI-FOOD IMPORTS – TOP 15 IMPORT PRODUCT CATEGORIES (million EUR)

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	2020	2021	Share 2021	Jan. 2021	Jan. 2022	Difference	
TOTAL AGRIFOOD	121 595	130 100	100%	9 098	12 548	3 449	38%
Oilseeds and protein crops	15 114	18 241	14%	1 342	1 761	419	31%
Fruit	21 050	20 696	16%	1 572	1 672	100	6%
Coffee, tea, cocoa and spices	15 944	17 061	13%	1 313	1 654	341	26%
Vegetable oils (oilseeds and palm)	6 712	8 225	6%	476	900	425	89%
Cereals	5 771	6 179	5%	492	895	402	82%
Non-edible for technical use	5 841	7 471	6%	416	755	339	82%
Mixed food preparations and ingredients	5 182	5 585	4%	336	555	219	65%
Preparations of fruit, nuts and vegetables	5 412	5 421	4%	442	505	63	14%
Vegetables	4 146	4 278	3%	373	461	88	24%
Other animal products	4 658	4 642	4%	316	439	123	39%
Cereal preparations and milling products	3 757	3 854	3%	244	403	159	65%
Margarine and other oils and fats (vegetable)	3 023	3 924	3%	285	400	115	40%
Pet food and forage crops	2 705	2 746	2%	183	281	98	54%
Spirits and liqueurs	3 061	3 303	3%	127	263	137	108%
Confectionery and chocolate	2 358	2 298	2%	144	218	74	51%
Other products	16 857	16 176	12%	1 038	1 386	349	34%

TABLE 9

AGRI-FOOD TRADE BALANCE (MILLION EUR)

TRADE BALANCE			
PRODUCT/PERIOD	Exports Jan-2022	Imports Jan-2022	Trade balance Jan-2022
	million EUR		
TOTAL AGRIFOOD	15 768	12 548	-3 221
Beef and veal	298	195	- 103
Pigmeat	996	25	- 971
Poultry and eggs	395	144	- 251
Sheep and goat	39	76	37
Dairy products	1 360	168	-1 192
Other animal products	584	439	- 145
Cereals	1 073	895	- 178
Cereal preparations and milling products	1 511	403	-1 108
Oilseeds and protein crops	206	1 761	1 555
Vegetable oils (oilseeds and palm)	224	900	676
Margarine and other oils and fats (vegetable)	163	400	237
Sugar and isoglucose	60	63	3
Confectionery and chocolate	707	218	- 489
Vegetables	680	461	- 219
Fruit	479	1 672	1 193
Preparations of fruit, nuts and vegetables	696	505	- 191
Olives and olive oil	307	37	- 269
Wine and wine based products	1 105	132	- 973
Spirits and liqueurs	648	263	- 385
Beer, cider and other beverages	781	150	- 631
Coffee, tea, cocoa and spices	519	1 654	1 135
Mixed food preparations and ingredients	1 025	555	- 470
Pet food and forage crops	618	281	- 337
Tobacco, cigars and cigarettes	458	199	- 259
Horticulture	327	178	- 149
Non-edible for technical use	382	755	373
Unspecified	128	20	- 109



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