



2022 agri-food trade

Civil Dialogue Group – International questions

DG AGRI G.1

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Overview of the world agricultural powerhouses

2022: peculiar year for EU agri-food trade

Some elements on 2022 market developments

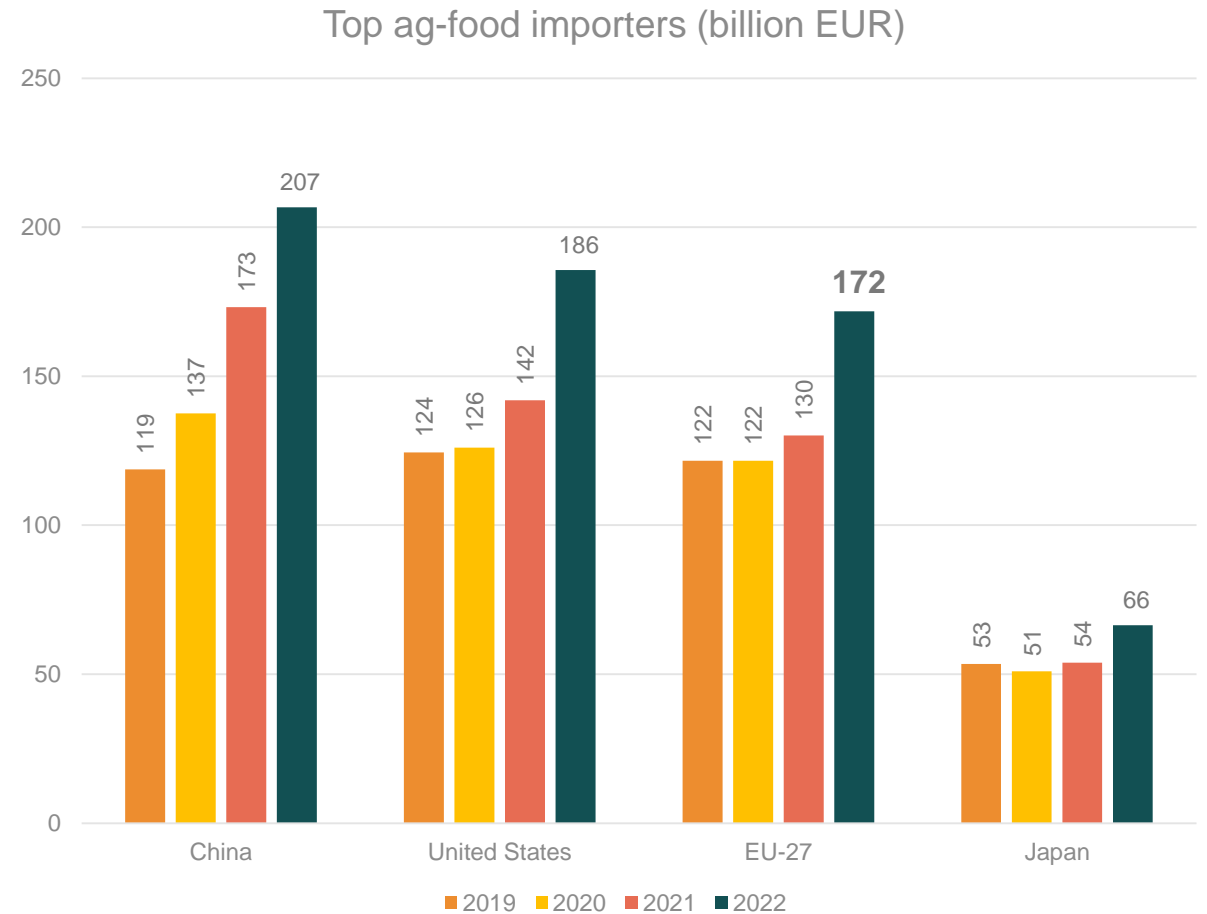
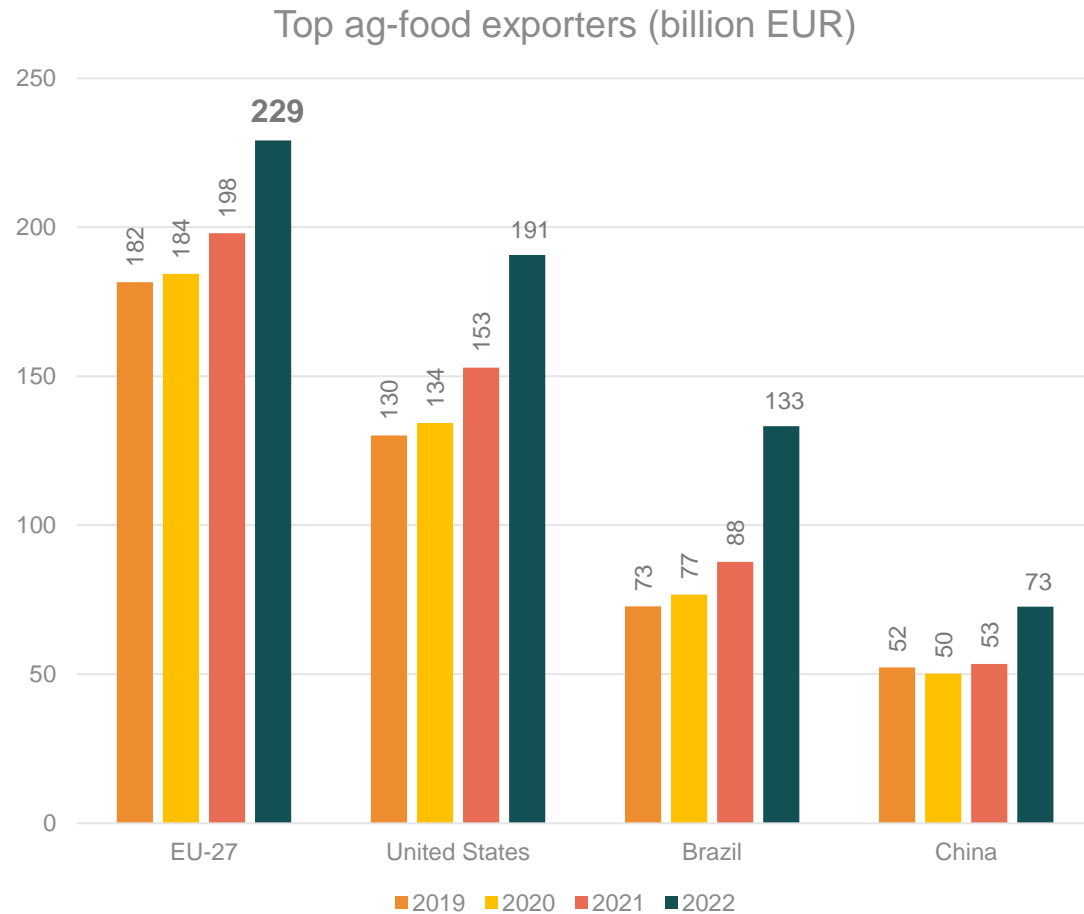


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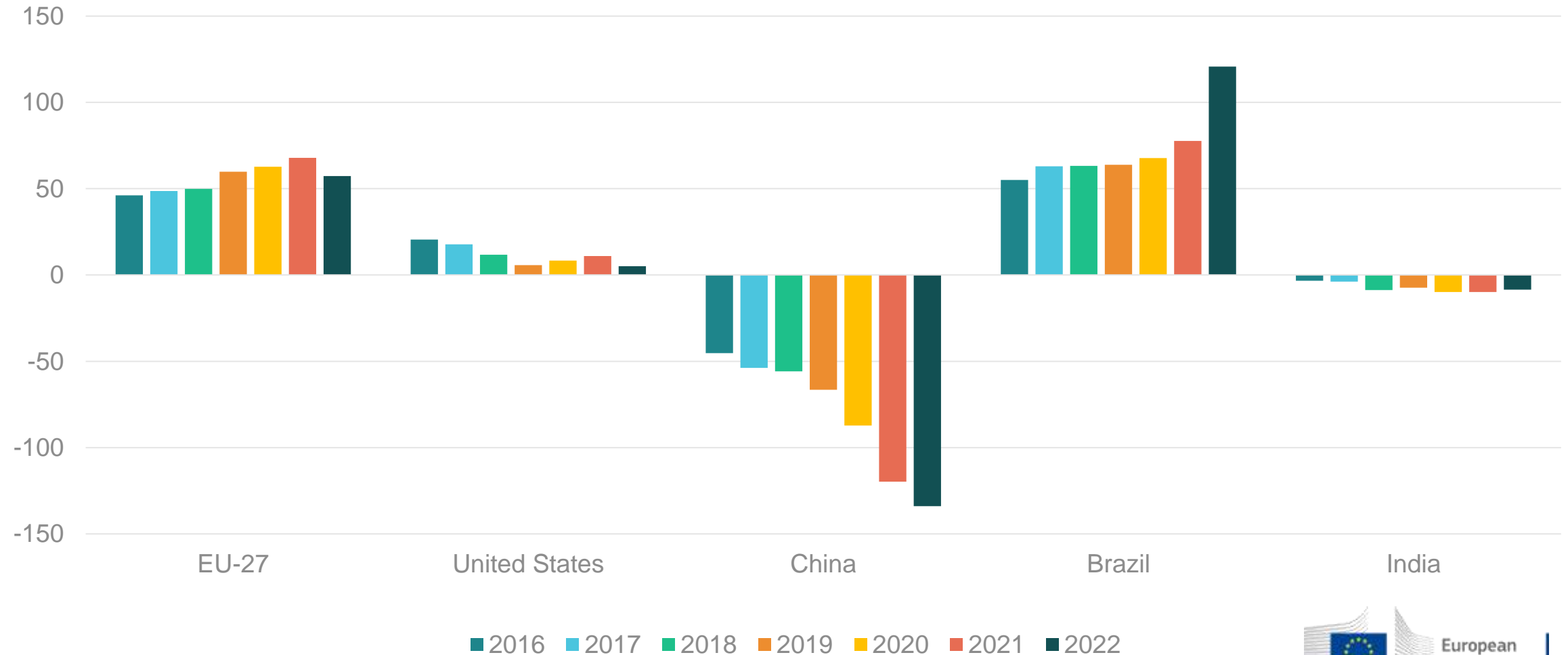
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World agricultural trading powerhouses



Agri-food trade balance (with RoW)

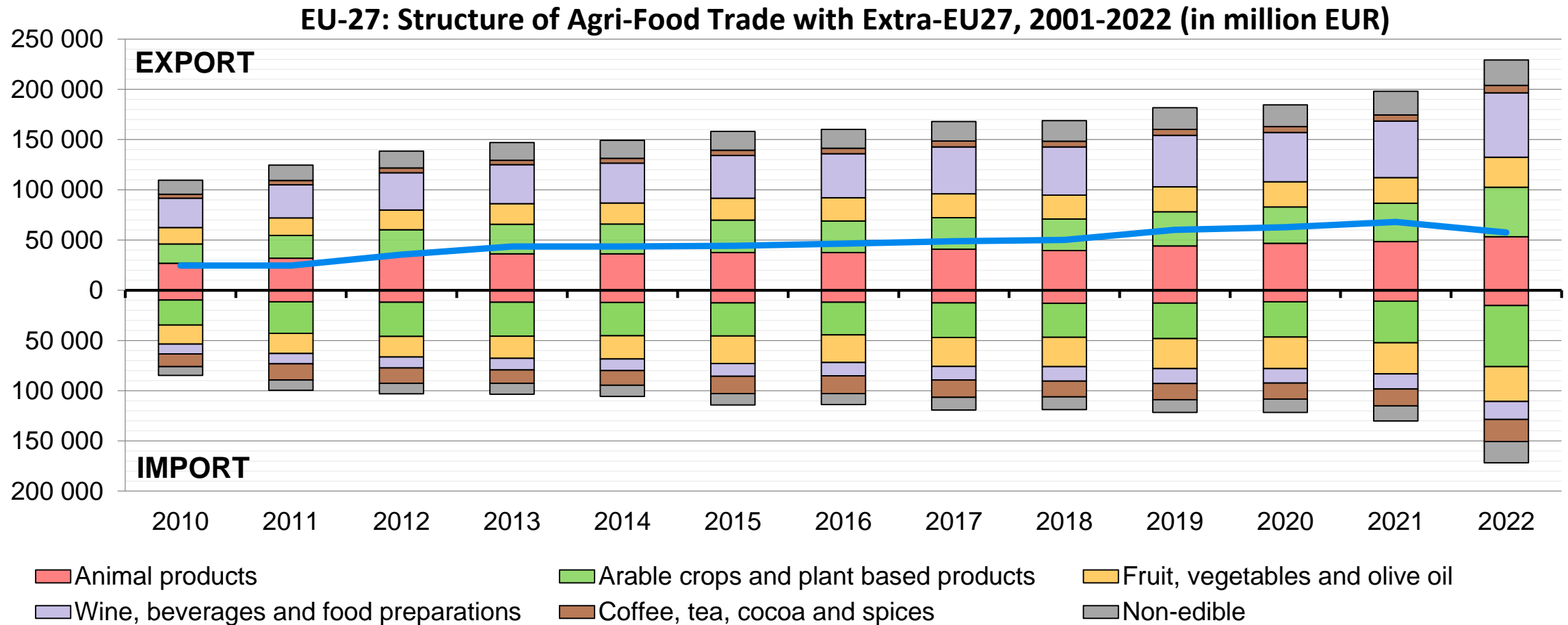
Top ag-food trade balance (billion EUR)



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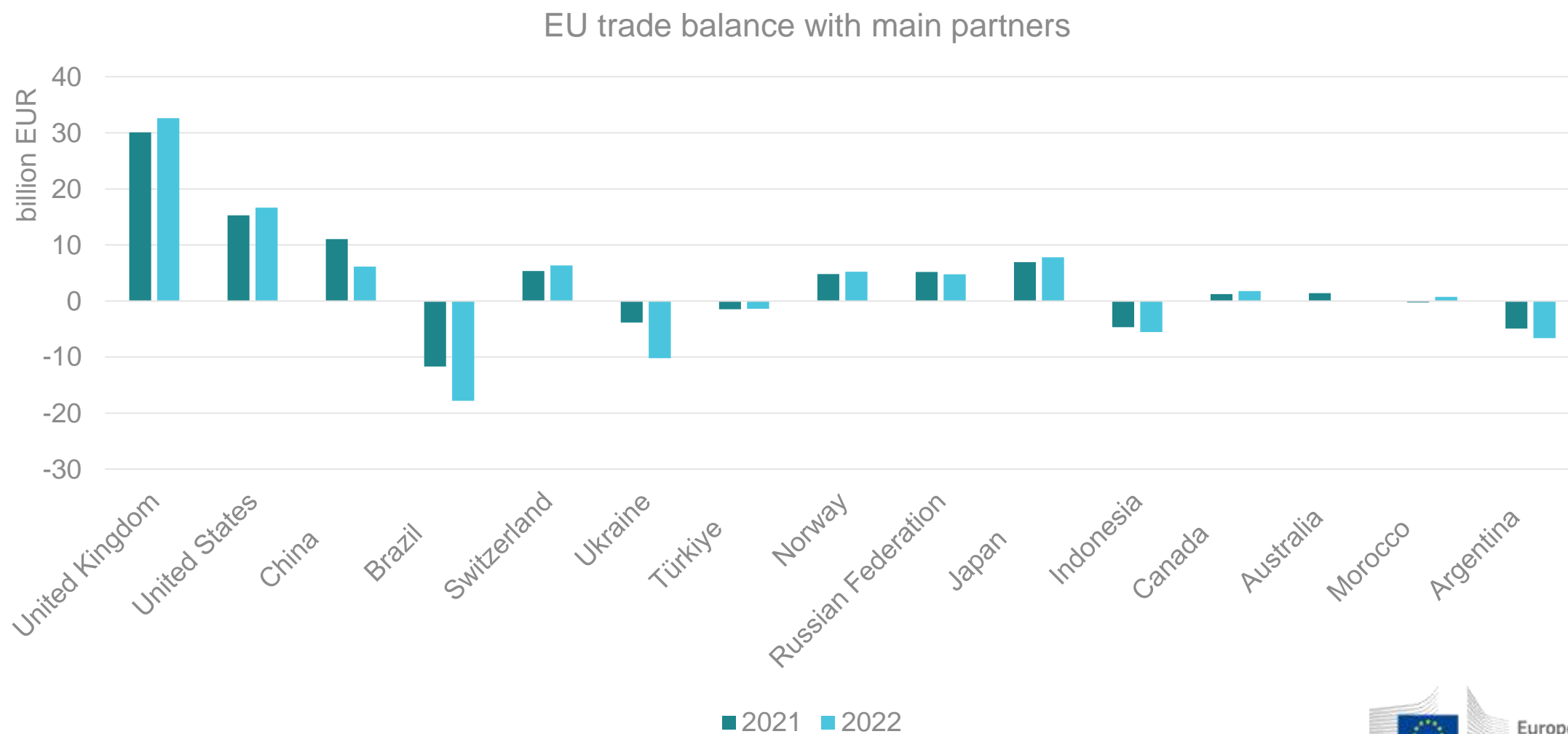
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EU trade balance 2010 - 2022

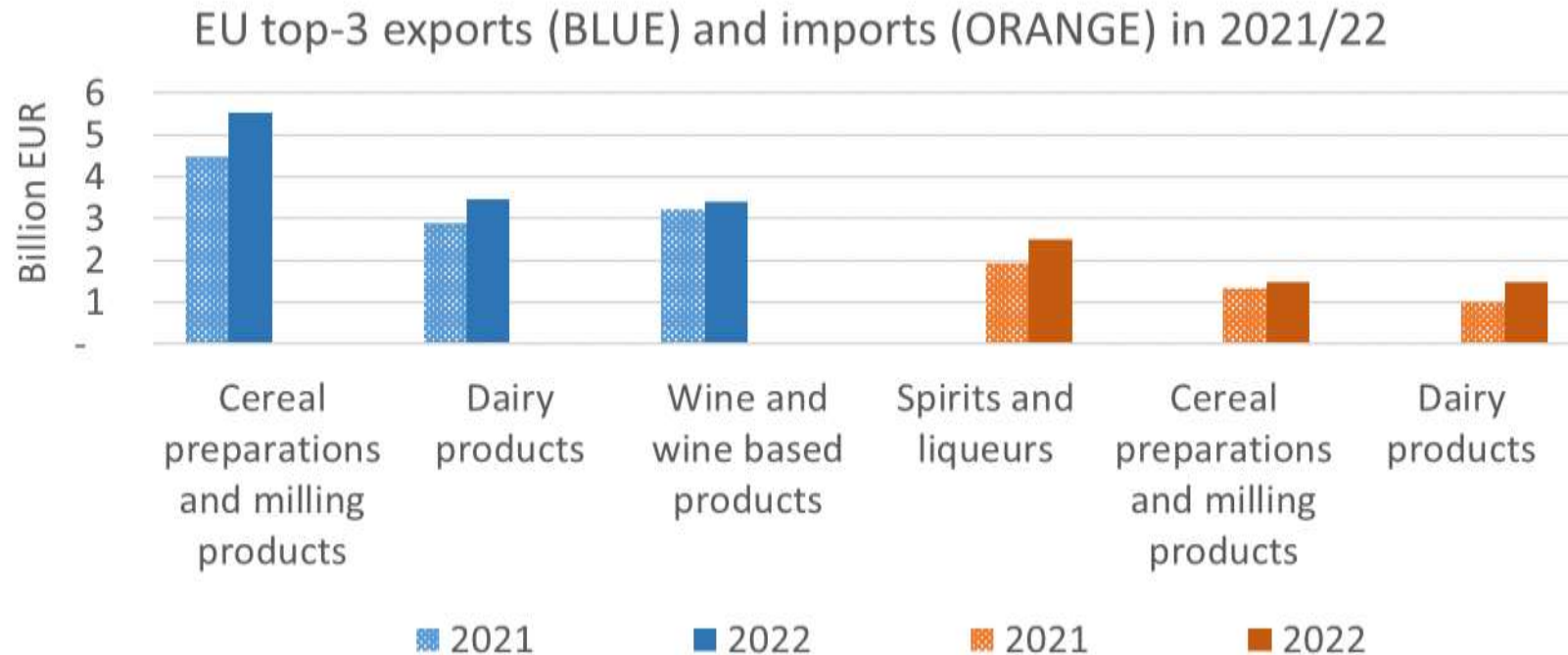


Source: Eurostat

EU trade balance with main partners



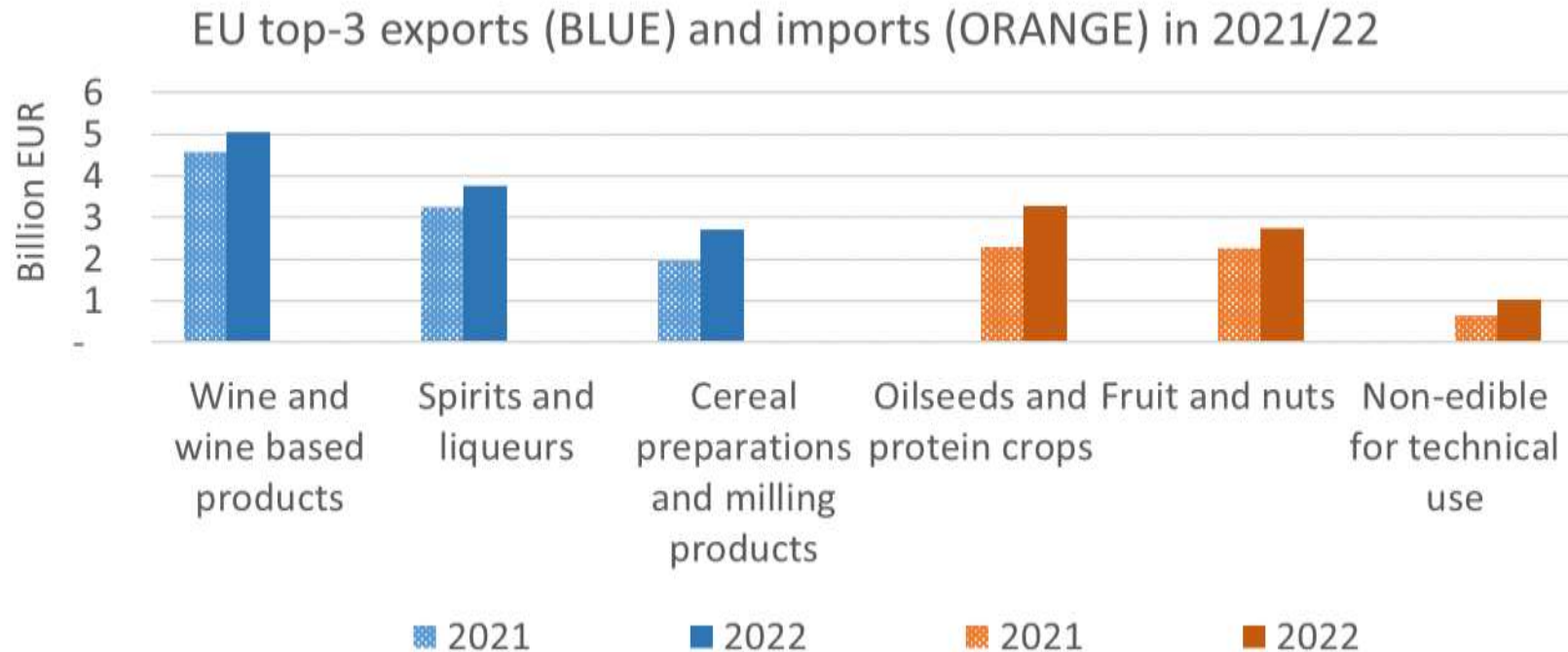
Agri-food trade with the UK



Source: COMEXT

- EU exports of cereal and milling products increased the most (+24%, +EUR 1 billion)
 - *Overall price increase but also slightly more volumes exported (+3%)*
- Exports of dairy products and preparations of fruit, nuts and vegetables also dynamic in 2022 (in values and volumes)
- Imports of spirits and liqueurs and dairy products increased the most

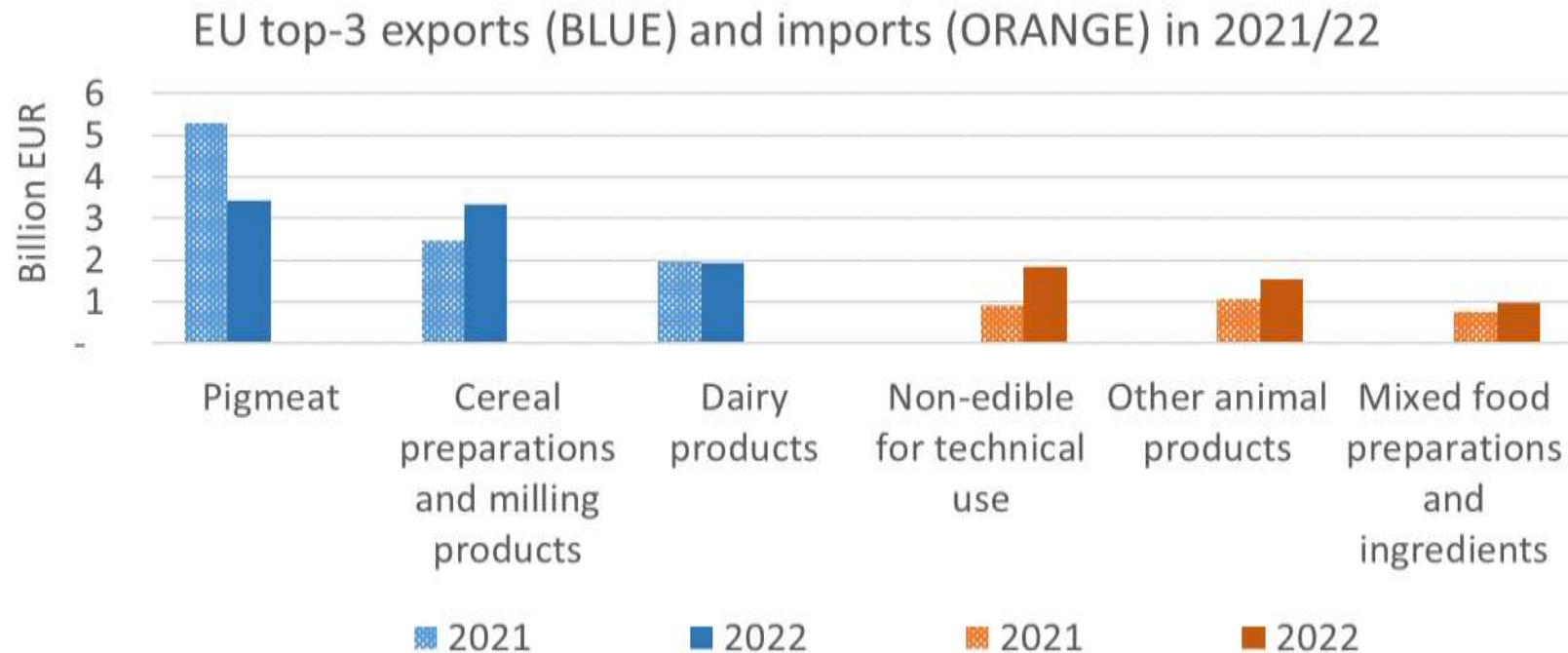
Agri-food trade with the US



Source: COMEXT

- Two most important exported categories, Wine and spirits and liqueurs, increased significantly
 - *Only from an increase in unit value, not in volumes*
- Biggest increase came from cereal preps and milling products: +700 million EUR (largely from price increase)
- +1 billion EUR of imports of oilseeds (with only 8% increase in volumes)

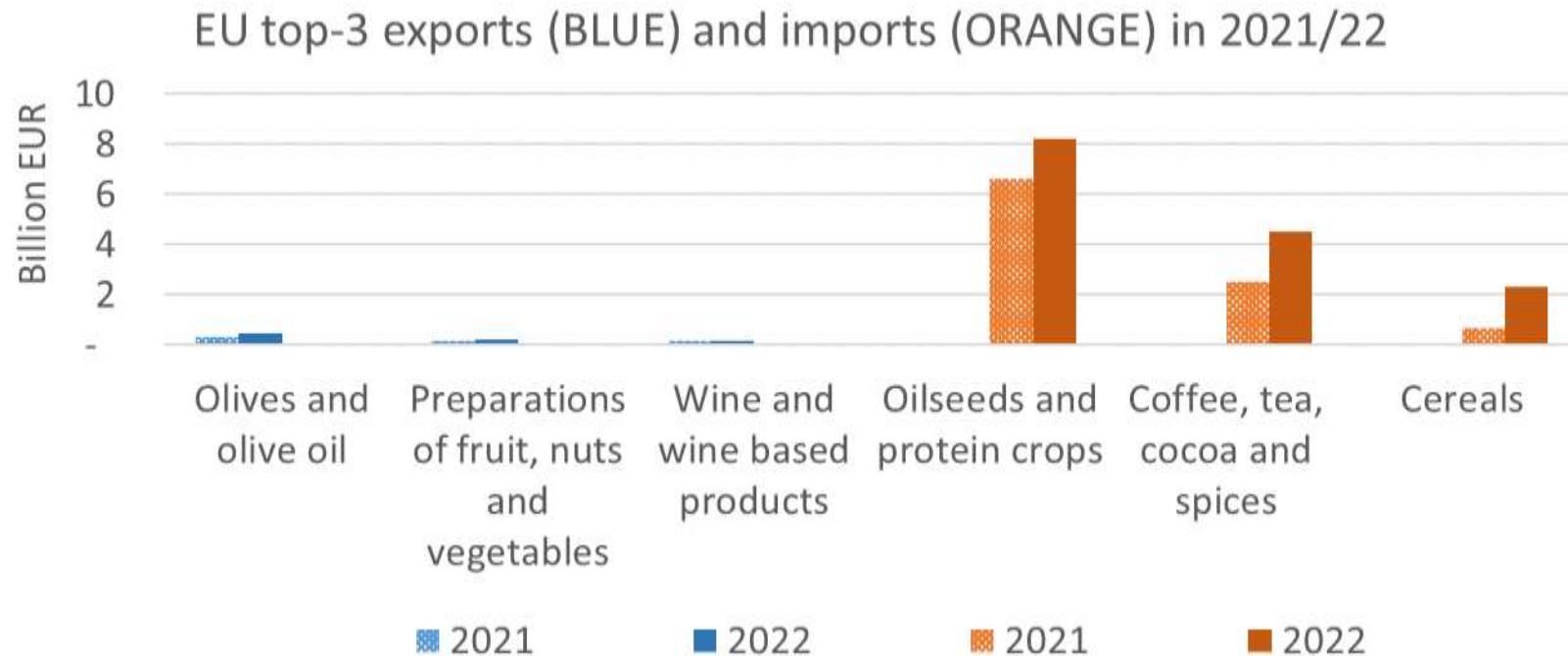
Agri-food trade with China



Source: COMEXT

- Drop in EU exports to China of top products
 - *Fall of volumes exported but unit value increased*
- This concerned pigmeat, dairy products, other animal products, wine and cereals
- Conversely, EU imports increased substantially (+60%)
 - Primarily for non-edible products (flax), mainly from higher imported volumes

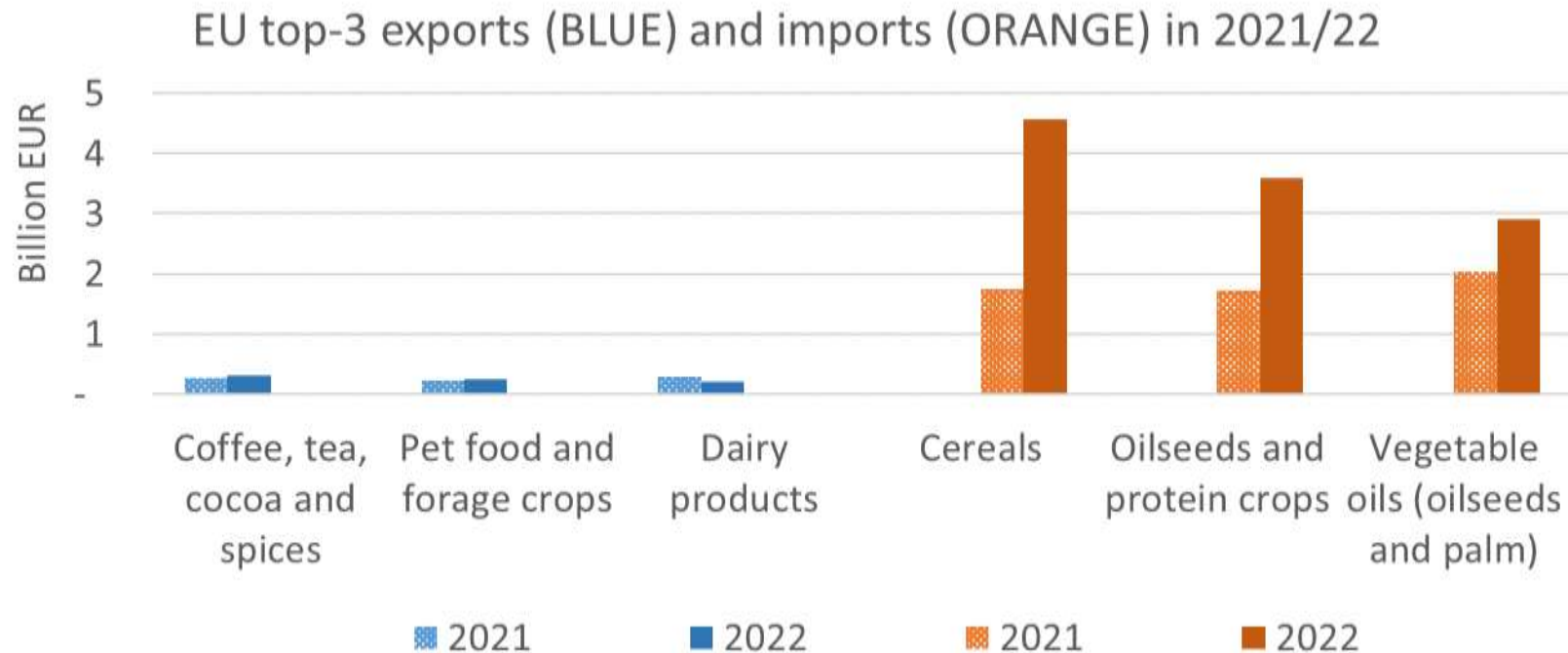
Agri-food trade with Brazil



Source: COMEXT

- EU imports increased the most for coffee, tea, cocoa and spices (+80%)
 - *Only due to a price increase*
- Imports of soya meals increased drastically (+44% in value) with more quantities imported thanks to their record crop
- For cereals imports, maize explains it all: +4.5 million t imported in 2022, together with the global price increase

Agri-food trade with Ukraine



Source: COMEXT

- EU imported significantly more from Ukraine, with triple digit growth
 - *Through the Solidarity Lanes/ATMs*
- Cereals and oilseeds being the two most significant increase
 - *With average unit value of imports lower than 2021*
- EU imports of poultry and sugar and isoglucose also significant

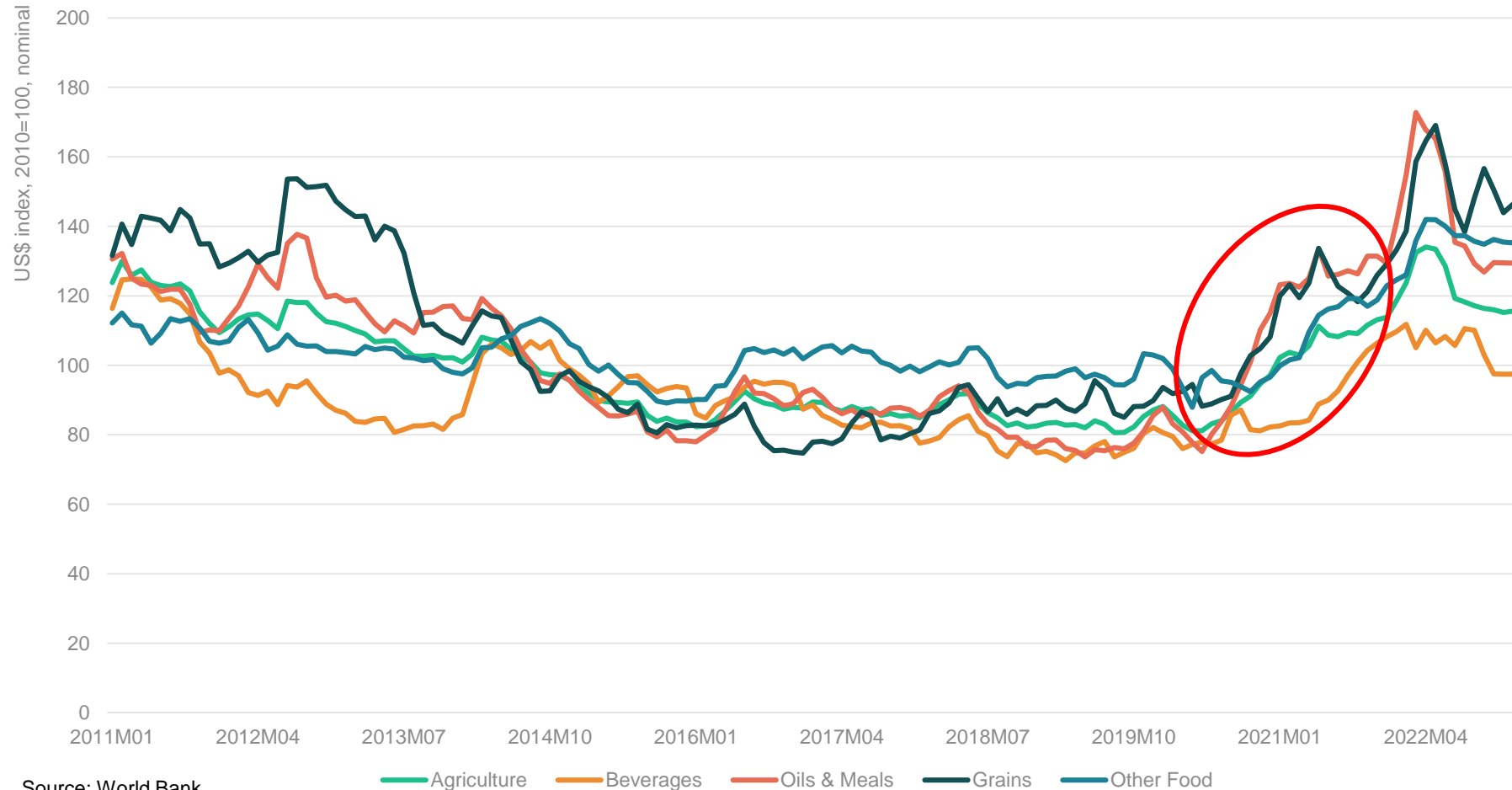
Trading regions

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Ag prices already increasing in 2021...

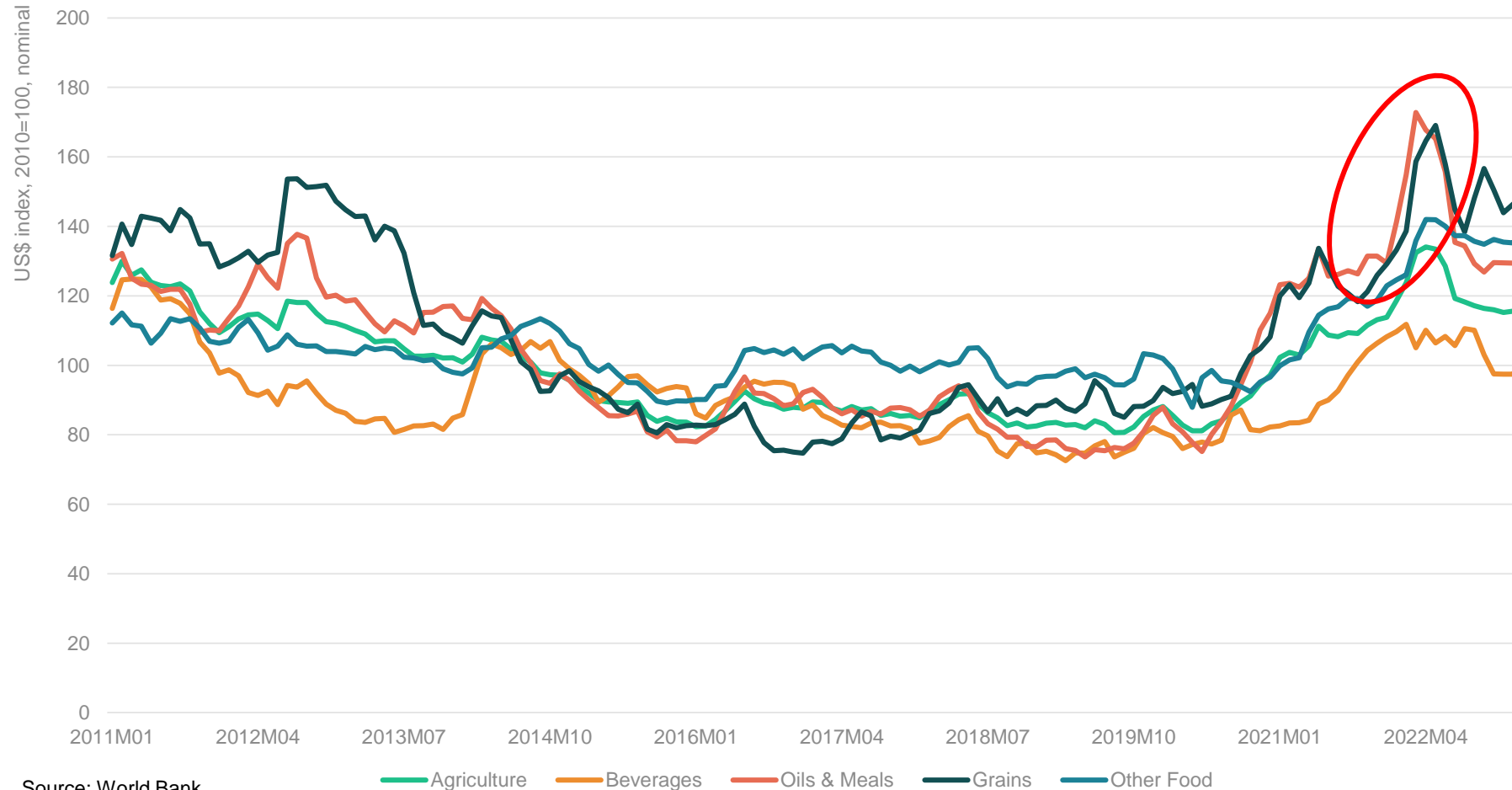
Agricultural prices: 2011-2023



Source: World Bank

...peaked in March 2022

Agricultural prices: 2011-2023



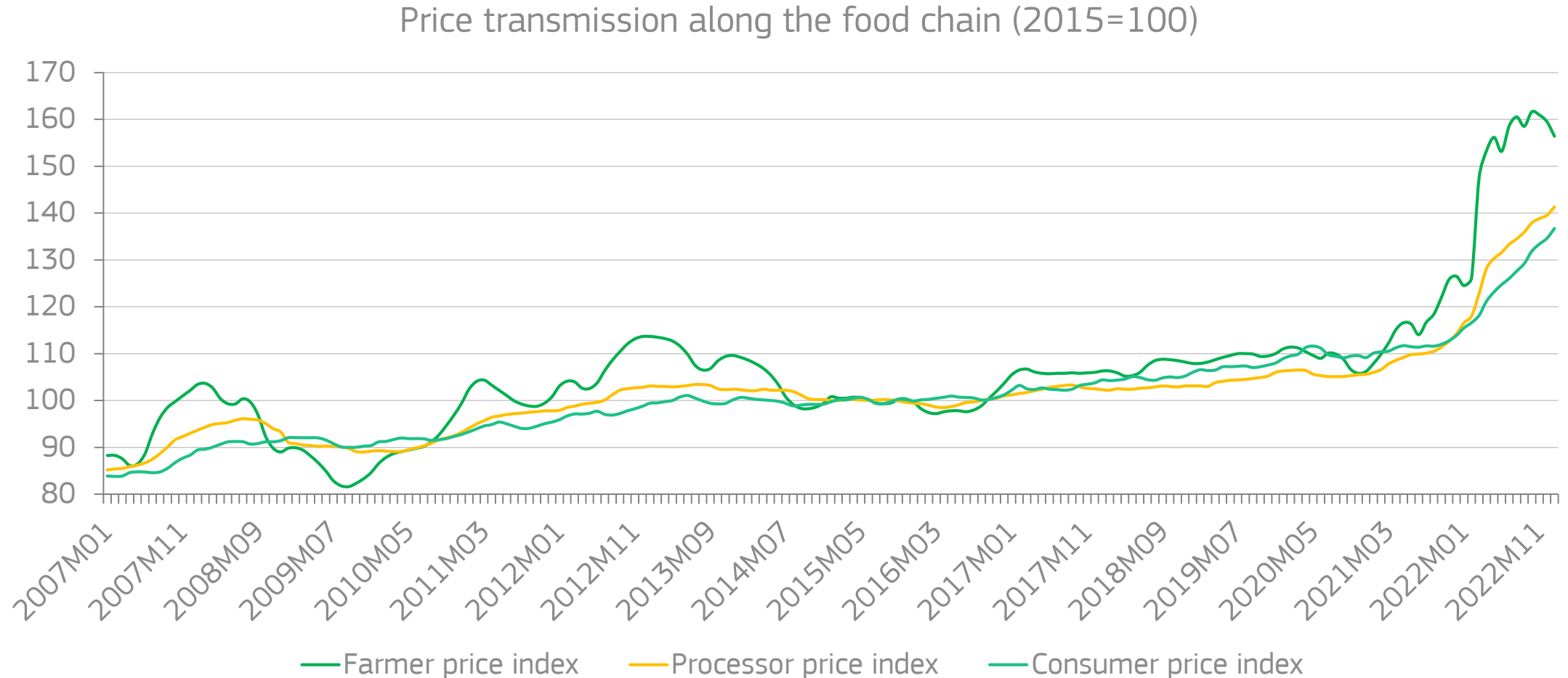
Input costs remained high along 2022

Energy, agricultural and fertilisers prices: 2011-2023



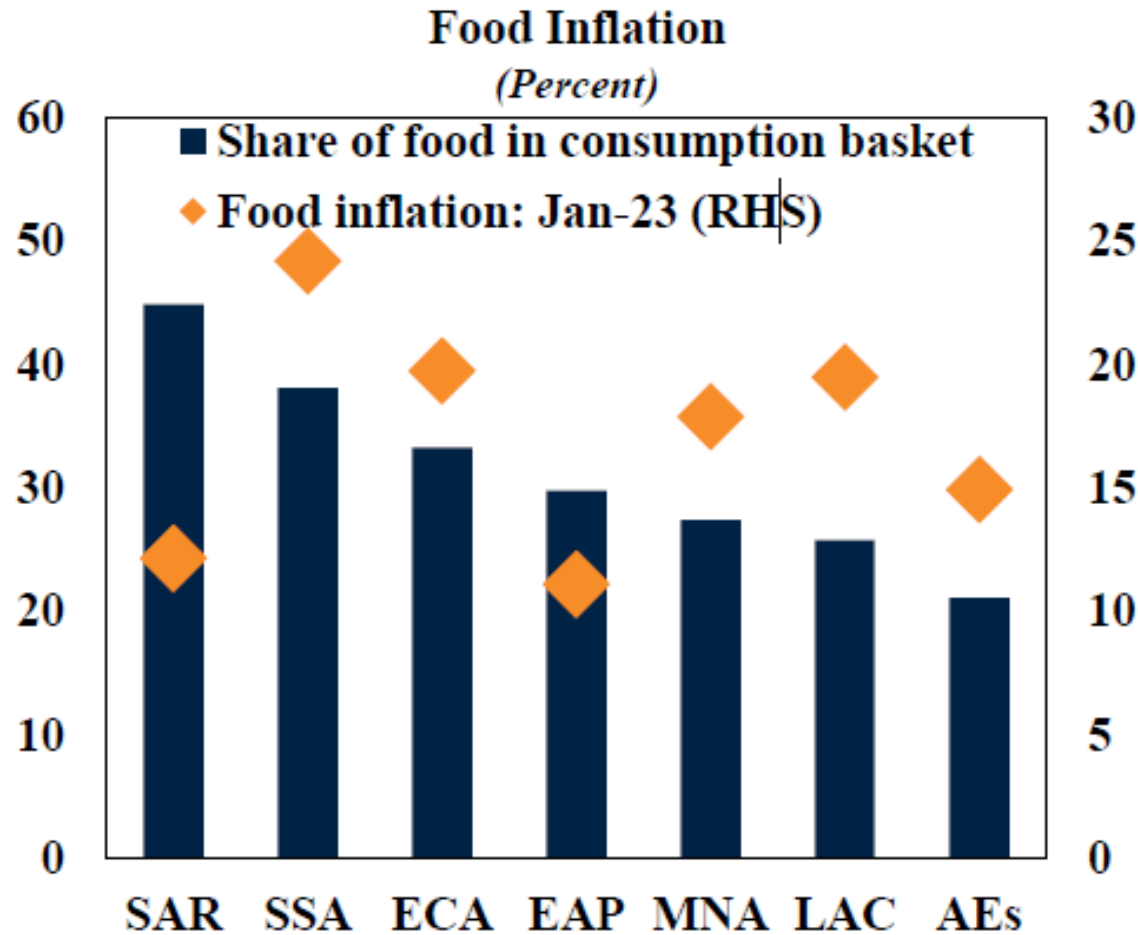
Source: World Bank

Price transmission along the value chain



Source: EC

Leading to food price inflation and food insecurity



Chronical undernourishment and acute food insecurity increases



839 million

people in chronic Undernourishment in 2022, i.e. 10.7 million more



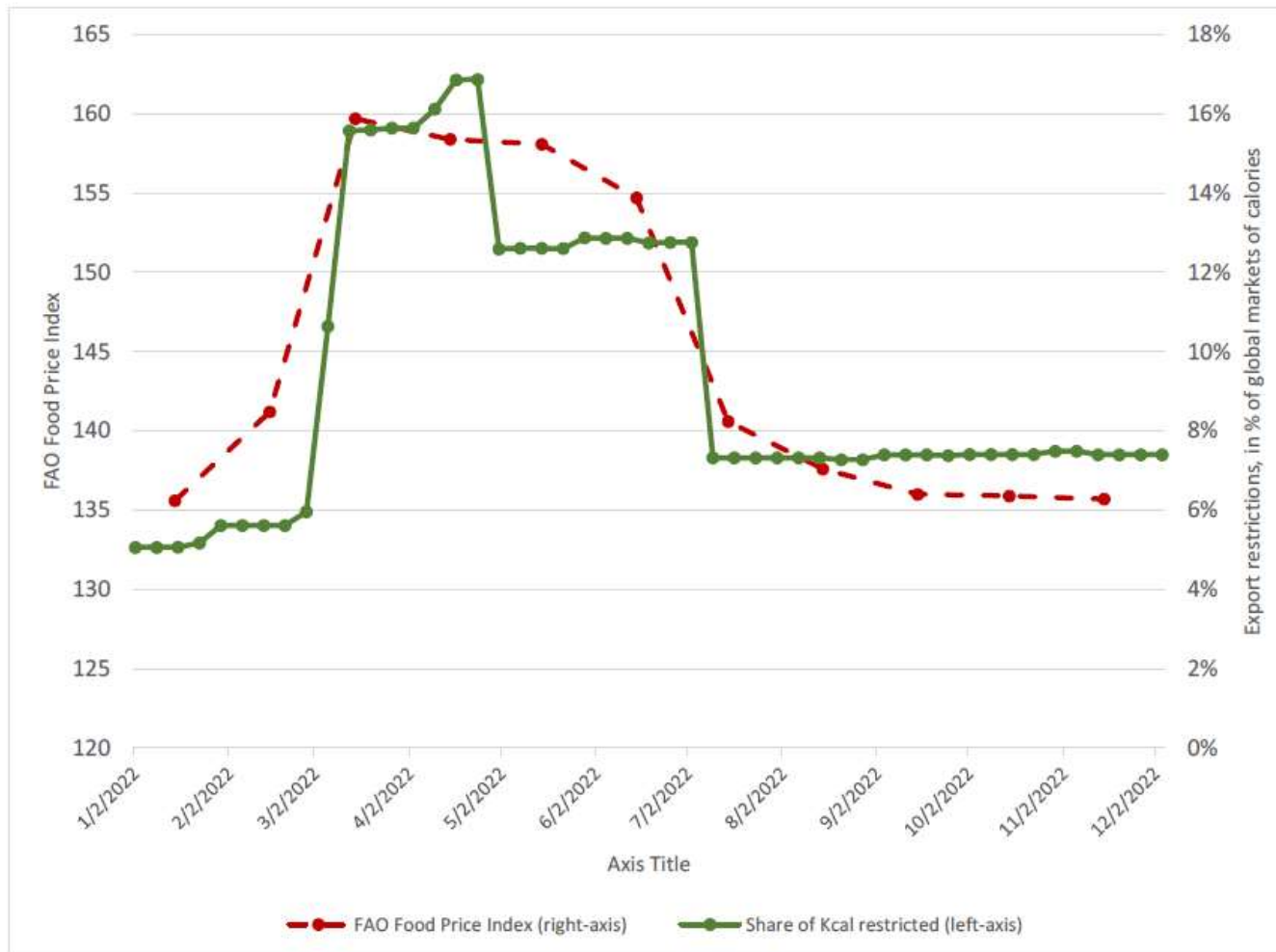
222 million people

acute food insecure in 53 countries/territories covered by the GRFC 2022

Source: World Bank (left panel), FAO (right)

AEs= advanced economies. EAP = East Asia and Pacific; ECA = Europe and Central Asia; LAC = Latin America and the Caribbean; MNA = Middle East and North Africa; SAR = South Asia; SSA = Sub-Saharan Africa.

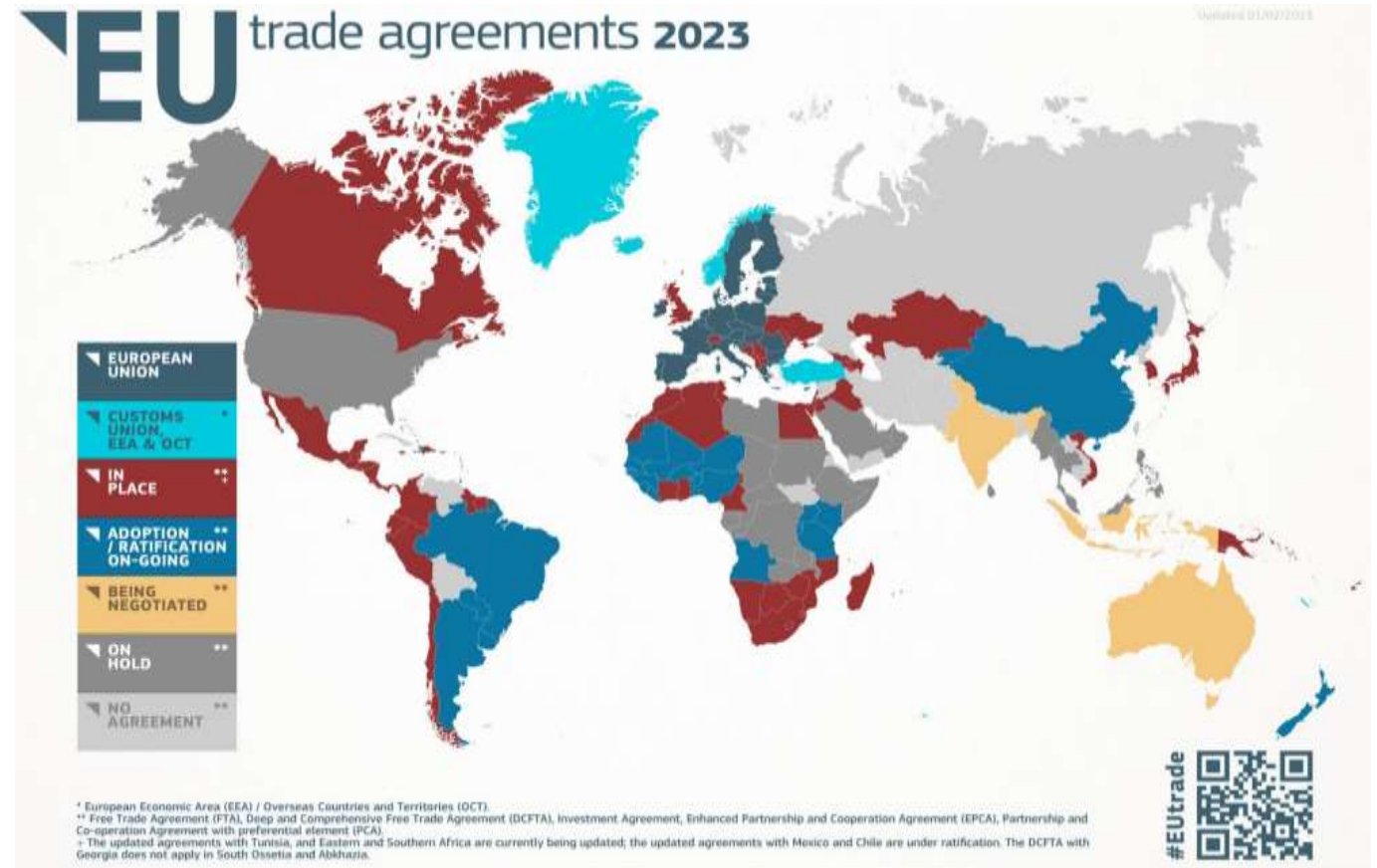
Export restrictions (source: FAO, IFPRI)



- **Most export restrictions imposed following the outbreak of the war in Ukraine had been lifted by mid-July 2022, but have remained largely unchanged for the remainder of the year.**

In conclusion

- **EU agri-food trade functioning well** despite interruptions in traditional supply chains and the war in Ukraine.
- **Prices** for most agri-food products have increased and this is reflected in the value of trade, but **volumes** have not decreased, sometimes even increased.
- This is due to our quality and competitive products and **the broad network of trade relations and agreements** which allows for **diversification** of trade partners.



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