



## EU28 and United Kingdom trade in agriculture and food from 2010 to 2019

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### Summary

DG Agriculture will soon be boasting the brilliant results of its 2019 trade, which it calls *agri-food* trade, with exports reaching €151.6 billion (bn) after €137.7 bn in 2018 (up 10%), with a surplus of €30.3 bn (compared to €19.5 bn in 2018, up 55%), although this is only the *agricultural* surplus since it does not take into account its huge deficit in fish. In fact, the EU28 *food* trade surplus was only €4.6 bn, a surplus for the first time since on average from 2010 to 2019 it had a food deficit of €6.7 bn. But without the €27 bn surplus in beverages – which are not basic food products – the EU28 food trade was in deficit by €22.3 bn in 2019, with the average deficit from 2010 to 2019 of €27.7 bn. Moreover, as the EU has a structural surplus in its food trade with developed countries, it had a deficit vis-à-vis developing countries of €18.8 bn in 2019 (€24.4 bn on average in 2010-19), and even €28.8 bn without beverages (€32.6 bn on average in 2010-19).

For its part, the United Kingdom (UK) accounted on average from 2010 to 2019 for 7.7% of extra-EU28 agricultural exports and 12.4% of extra-EU28 imports, of which 18.8% and 29.0% for beverages and 13.4% and 10.6% for fish and preparations respectively. This resulted in an *agricultural* deficit of €3.9 bn in 2019 and an average deficit of €4.3 bn from 2010 to 2019, with developing countries accounting for €4.8 bn and €4.7 bn respectively. The UK *food* deficit was €5.3 bn in 2019 and €5.6 bn on average for 2010-19 but, without beverages, these deficits were €9.1 bn in 2019 and €8.9 bn on average for 2010-19. With developing countries, the deficit was €5.8 bn in 2019 and €5.5 bn on average for 2010-19 and, without beverages, the deficit was €8 bn in 2019 and €7.5 bn on average for 2010-19. In order to assess the total impact of Brexit for both the EU27 and the UK, it is also necessary to take into account the UK's share of intra-EU28 food (and agricultural) trade, which is twice as high for import-related internal trade (10.5% in 2019) as for export-related internal trade (4.9%), percentages which remained relatively stable from 2010 to 2019. However, the UK's share of internal trade in beverages is much higher: 17.3% for import-related trade versus 9.8% for export-related trade.

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Easy Comext published on 14 February 2020 the agricultural trade data – as defined in Annex 1 of the WTO Agreement on Agriculture (AoA), in Harmonised System nomenclature – of the EU28 and the EU27 (EU28-United Kingdom or UK) for 2019 except for intra-EU28 trade (exports and imports) and extra-EU27 and intra-EU27 trade. As it is important to also know this intra-EU trade after Brexit and while we have these data for the first 11 months of 2019, for the EU28 we will identify those for 2019 by multiplying the ratio of the amount of intra-EU28 trade in the first 11 months of 2019 to extra-EU28 trade in the first 11 months of 2019 by the amount of extra-EU28 trade in 2019. For the EU27 it is first necessary to identify extra-EU27 trade in 2019. To do this, knowing the extra-EU27 trade and trade with developed countries for the first 11 months of 2019, we multiply the ratio of extra-EU27 trade with developed countries for the first 11 months by the amount of trade with developed countries in 2019. The United Kingdom (UK) agricultural trade and its weight in EU28 agricultural trade are then identified. Finally, food trade will be identified in SITC (Standard International Trade Classification) data for both the EU28 and the UK.

## **I - EU28 and UK agricultural trade from 2010 to 2019**

DG Agriculture will soon be boasting brilliant results for its 2019 trade, which it labels *agri-food* trade, with exports reaching €151.6 billion (€bn) after €137.7 bn in 2018 (up 10%), with a surplus of €30.3 bn (compared to €19.5 bn in 2018, an increase of 55%). In reality, these data concern only *agricultural* trade, forgetting that fish and preparations are an essential food product, whose growing deficit reached €20.7 bn in 2019, so that the "agri-food" surplus including fish was still €9.7 bn, against a deficit of €992 million (m) in 2018 after decreasing deficits since 2015 (€4.3 bn).

Not including fish and preparations in agri-food trade is all the more inconsistent because, although there is a Common Fisheries Policy, it only concerns the conservation and sustainable exploitation of fisheries resources since fisheries policy depends on the Ministries of Agriculture of the largest countries for EU fisheries: France, Germany, Spain, Italy, Belgium, Ireland, Poland, Sweden, Finland, Lithuania, Latvia, Croatia. It is these ministries that manage the Common Fisheries Policy funds under the EFFAMP (European Fund for Maritime Affairs and Fisheries) and the EAFRD (European Agricultural Fund on Rural Development), and the funds allocated to fisheries in the EU's ultra-marine regions come under POSEI, one of the chapters of the EAGF (European Agricultural Guarantee Fund).

### **1.1 – EU28 agricultural trade from 2010 to 2019**

Since beverages are not a basic food product and their growing surplus reached €26.7 bn in 2019, without beverages the EU28's 'agricultural' surplus was only €3.6 bn in 2019, after a deficit of €5 bn in 2018. Adding the fish deficit, the EU28 had a net 'agri-food' deficit of €17.1 bn in 2019 (an improvement of €8.4 bn compared to the deficit of €25.5 bn in 2018).

The EU28 has always had a surplus in its agricultural trade with developed countries – assimilated to the 9 western OECD countries (Australia, Canada, Iceland, Israel, Japan, Norway, New Zealand, Switzerland, United States) plus Russia – with a surplus of €36.2 bn in 2019 (after €31.3 bn in 2018), including €17 bn for beverages (after €15.2 bn in 2018), even though it has always been in deficit in fish (€8.1 bn in 2019 as in 2018), so that its agri-food

surplus without beverages was €19.2 bn and that without beverages plus fish was limited to €11.1bn in 2019 (a €3.1 bn improvement over 2018).

As a result, the EU28 continued to run a deficit in agricultural trade with developing countries (DCs) of €5.9 bn in 2019 (after €11.8 bn in 2018), but still had a surplus of €9.8 bn on beverages, so that, without beverages, its deficit was €15.6 bn. However, as the EU28 still had a deficit of €12.5 bn in its fish trade, its net agri-food deficit without fish and beverages with developing countries (DCs) was €28.2 bn (€33.5 bn in 2018, an improvement of €5.4 bn).

**Table 1 - Extra-EU28 agricultural and fish trade: 2010-19**

€ million	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Average
All agricultural products (AAP)											
EU28 exports	87007	101286	113418	120095	121861	129347	131455	137734	137693	151580	123148
EU28 imports	86222	100178	103953	103670	106124	115948	114486	118843	118169	121248	108884
Balance	785	1108	9465	16425	15737	13399	16969	18891	19525	30332	14264
Beverages											
EU28 exports	18455	21713	24961	25158	25141	27469	27841	29930	30958	33357	26498
EU28 imports	4772	4929	5337	5501	5360	5889	5913	6088	6403	6636	5683
Balance	13683	16784	19624	19657	19781	21580	21928	23842	24555	26722	20816
Fish and preparations (FP)											
EU28 exports	3030	3421	3960	4007	4132	4241	4492	4968	5071	5448	4277
EU28 imports	17141	18534	18537	19251	20531	21901	23911	25206	25587	26120	21672
Balance	-14111	-15113	-14577	-15244	-16399	-17660	-19419	-20238	-20516	-20672	-17395
Balances of all agricultural products less beverages and plus fish and preparations (FP)											
AAP-beverage	-12898	-15676	-10159	-3232	-4044	-8181	-4959	-4951	-5031	3610	-6552
AAP+FP	-13326	-14005	-5112	1181	-662	-4261	-2450	-1347	-992	9610	-3136
AAP+FP-bever	-27009	-30789	-24736	-18476	-20443	-25841	-24378	-25189	-25547	-17112	-23952

**Table 2 – EU28 agricultural and fish trade with developed countries: 2010-19**

€ million	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Average
All agricultural products (AAP)											
EU28 exports	39907	44352	49099	50756	49817	50780	53607	57209	58409	63315	51725
EU28 imports	18434	21775	23046	24431	24961	27005	26147	26300	27118	27101	24632
Balance	21473	22577	26053	26325	24856	23775	27460	30909	31291	36214	27093
Beverages											
EU28 exports	11345	12597	14615	14890	14805	16350	16847	18058	18638	20397	15854
EU28 imports	2535	2638	2958	2780	2882	3222	3172	3310	3408	3430	3034
Balance	8810	9959	11657	12110	11923	13128	13675	14748	15230	16968	12821
Fish and preparations (FP)											
EU28 exports	1413	1569	1589	1688	1714	1747	1915	2160	2165	2379	1834
EU28 imports	6249	6506	6587	7126	7751	8663	9760	9839	10243	10518	8324
Balance	-4836	-4937	-4998	-5438	-6037	-6916	-7845	-7679	-8078	-8139	-6490
Balances of all agricultural products less beverages and plus fish and preparations (FP)											
AAP-beverage	12663	12618	14396	14215	12933	10647	13785	16161	16061	19246	14273
AAP+FP	16637	17640	21055	20887	18819	16859	19615	23230	23213	28075	20603
AAP+FP-bever	7827	7681	9398	8777	6896	3731	5940	8482	7983	11107	7782

**Table 3 – EU28 agricultural and fish trade with developing countries: 2010-19**

€ million	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Average
All agricultural products (AAP)											
EU28 exports	47100	56934	64319	69339	72044	78567	77848	80525	79284	88265	71423
EU28 imports	67788	78403	80907	79239	81163	88943	88339	92543	91051	94147	84252
Balance	-20688	-21469	-16588	-9900	-9119	-10376	-10491	-12018	-11767	-5882	-12830
Beverages											
EU28 exports	7110	9116	10346	10268	10336	11119	10994	11872	12320	12960	10644
EU28 imports	2237	2291	2379	2721	2478	2667	2741	2778	2995	3206	2649
Balance	4873	6825	7967	7547	7858	8452	8253	9094	9325	9754	7995
Fish and preparations (FP)											
EU28 exports	1617	1852	2371	2319	2418	2494	2577	2808	2906	3069	2443
EU28 imports	10892	12028	11950	12125	12780	13238	14151	15367	15344	15602	13348
Balance	-9275	-10176	-9579	-9806	-10362	-10744	-11574	-12559	-12438	-12533	-10905
Balances of all agricultural products less beverages and plus fish and preparations (FP)											
AAP-beverage	-25561	-28294	-24555	-17447	-16977	-18828	-18744	-21112	-21092	-15636	-20825
AAP+FP	-29963	-31645	-26167	-19706	-19481	-21120	-22065	-24577	-24205	-18415	-23734
AAP+FP-bever	-34836	-38470	-34134	-27253	-27339	-29572	-30318	-33671	-33530	-28169	-31729

## 1.2 – EU27 agricultural trade from 2010 to 2019

Let us now compare EU27 agricultural trade with that of EU28 as if the UK had left the EU28 since 2010. Curiously, Table 4 shows that the level of exports of all extra-EU27 agricultural

products would have been €30 bn higher in 2019 than in the EU28 (Table 1). This is due to the fact that the UK has a deficit in its agricultural trade (Tables 7 to 9), so that EU27 exports to the UK increase total extra-EU27 exports, while the level of imports increases relatively little. So much so that the EU27 balance of agricultural trade in 2019 would have been almost double that of the EU28 (€58.2 bn compared with €30.3 bn).

Table 4 – Extra-EU27 agricultural and fish trade: 2010-19

€ million	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Average
All agricultural products (AAP)											
EU27 exports	109750	124698	138382	147047	149087	158436	160444	168108	169027	181595	150657
EU27 imports	86878	101639	104940	105244	107465	116392	115742	120517	120446	123350	110261
Balance	22872	23059	33442	41803	41622	42044	44702	47591	48581	58245	40396
Beverages											
EU27 exports	19204	21649	24697	25366	25302	27694	28168	30380	31269	33457	26719
EU27 imports	6083	6568	6765	7313	6884	7135	7506	7684	7948	8143	7203
Balance	13121	15081	17932	18053	18418	20559	20662	22696	23321	25314	19516
Fish and preparations (FP)											
EU27 exports	3585	3946	4556	4640	4852	5236	5614	5886	6075	6263	5065
EU27 imports	16551	17876	17652	18350	19690	20912	23142	24605	24902	25524	20920
Balance	-12966	-13930	-13096	-13710	-14838	-15676	-17528	-18719	-18827	-19261	-15855
Balances of all agricultural products less beverages and plus fish and preparations (FP)											
TPA-boissons	9751	7978	15510	23750	23204	21485	24040	24895	25260	32931	20880
TPA+PP	9906	9129	20346	28093	26784	26368	27174	28872	29754	38984	24541
TPA+PP-boiss	-3215	-5952	2414	10040	8366	5809	6512	6176	6433	13670	5025

Table 5 – Extra-EU27 agricultural and fish trade with developed countries: 2010-19

€ million	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Average
All agricultural products (AAP)											
EU27 exports	37202	41107	45336	46986	45895	46393	49264	52897	54065	58682	47783
EU27 imports	15371	18533	19649	21096	21428	22879	22418	22458	23326	23311	21047
Balance	21831	22574	25687	25890	24467	23514	26846	30439	30739	35371	26736
Beverages											
EU27 exports	9859	10701	12327	12523	12445	13712	14269	15501	16016	17678	13503
EU27 imports	1706	1761	1981	1934	1939	2059	2190	2235	2317	2334	2046
Balance	8153	8940	10346	10589	10506	11653	12079	13266	13699	15344	11458
Fish and preparations (FP)											
EU27 exports	1148	1234	1300	1366	1341	1441	1623	1822	1903	1955	1513
EU27 imports	5534	5797	5797	6406	6967	7744	8937	9104	9467	9709	7546
Balance	-4386	-4563	-4497	-5040	-5626	-6303	-7314	-7282	-7564	-7754	-6033
Balances of all agricultural products less beverages and plus fish and preparations (FP)											
AAP-beverage	13678	13634	15341	15301	13961	11861	14767	17173	17040	20027	15278
AAP+FP	17445	18011	21190	20850	18841	17211	19532	23157	23175	27617	20703
AAP+FP-bever	9292	9071	10844	10261	8335	5558	7453	9891	9476	12273	9245

Table 6 – Extra-EU27 agricultural and fish trade with developing countries: 2010-19

€ million	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Average
All agricultural products (AAP)											
EU27 exports	72548	83491	93046	100061	103193	112043	111180	115210	114962	122913	102865
EU27 imports	71507	83105	85292	84146	86037	93514	93324	98058	97120	100038	89214
Balance	1041	386	7754	15915	17156	18529	17856	17152	17842	22875	13651
Beverages											
EU27 exports	9346	10948	12369	12843	12857	13980	13899	14878	15252	15779	13215
EU27 imports	4377	4807	4784	5377	4946	5076	5316	5449	5631	5809	5157
Balance	4969	6141	7585	7466	7911	8904	8583	9429	9621	9970	8058
Fish and preparations (FP)											
EU27 exports	2437	2712	3256	3274	3511	3795	3991	4064	4173	4308	3552
EU27 imports	11017	12079	11855	11944	12723	13168	14205	15501	15435	15815	13374
Balance	-8580	-9367	-8599	-8670	-9212	-9373	-10214	-11437	-11262	-11507	-9822
Balances of all agricultural products less beverages and plus fish and preparations (FP)											
AAP-beverage	-3928	-5755	169	8449	9245	9625	9273	7723	8221	12905	5593
AAP+FP	-7539	-8981	-845	7245	7944	9156	7642	5715	6580	11368	3829
AAP+FP-bever	-12508	-15122	-8430	-221	33	252	-941	-3714	-3041	1398	-4229

### 1.3 – UK weight in EU28 agricultural trade from 2010 to 2019

Table 7 shows that, as reported in Table 1, the UK accounted on average from 2010 to 2019 for 7.7% of all extra-EU28 agricultural exports and 12.4% of extra-EU28 imports, of which respectively 18.8% and 29.0% for beverages and 13.4% and 10.6% for fish and preparations.

Table 7 - The UK's weight in EU28 agricultural trade: 2010-19

€ million	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Average
All agricultural products (AAP)											
UK exports	6507	7821	8746	8786	9240	10214	9953	10019	9938	10757	9198
UK imports	11720	12324	13030	12745	13180	14958	14148	14337	14265	14706	13541
Balance	-5213	-4503	-4284	-3959	-3940	-4744	-4195	-4318	-4327	-3949	-4343
UK X/EU X	7.5%	7.7%	7.7%	7.3%	7.6%	7.9%	7.6%	7.3%	7.2%	7.1%	7.5%
UK M/EU28M	13.6%	12.3%	12.5%	12.3%	12.4%	12.9%	12.4%	12.1%	12.1%	12.1%	12.4%
Beverages											
UK exports	3533	4518	5121	5006	4983	5445	5113	5135	5398	5623	4988
UK imports	1410	1429	1552	1434	1561	1883	1679	1765	1858	1909	1648
Balance	2123	3089	3569	3572	3422	3562	3434	3370	3540	3714	3340
UK X/EU X	19.1%	20.8%	20.5%	19.9%	19.8%	19.8%	18.4%	17.2%	17.4%	16.9%	18.8%
UK M/EU28M	29.5%	29.0%	29.1%	26.1%	29.1%	32.0%	28.4%	29.0%	29.0%	28.8%	29.0%
Fish and preparations (FP)											
UK exports	384	468	499	570	683	576	579	653	584	753	575
UK imports	1824	2005	2178	2264	2333	2505	2501	2407	2376	2563	2296
Balance	-1440	-1537	-1679	-1694	-1650	-1929	-1922	-1754	-1792	-1810	-1721
UK X/EU X	12.7%	13.7%	12.6%	14.2%	16.5%	13.6%	12.9%	13.1%	11.5%	13.8%	13.4%
UK M/EU28M	10.6%	10.8%	11.7%	11.8%	11.4%	11.4%	10.5%	9.5%	9.3%	9.8%	10.6%
Balances of all agricultural products less beverages and plus fish and preparations (FP)											
AAP-beverage	-7336	-7592	-7853	-7531	-7362	-8306	-7629	-7688	-7867	-7663	-7683
AAP+FP	-6653	-6040	-5963	-5653	-5590	-6673	-6117	-6072	-6119	-5759	-6064
AAP+FP-bever	-8776	-9129	-9532	-9225	-9012	-10235	-9551	-9442	-9659	-9473	-9403

Table 8 shows that, as reported in Table 2, the UK accounted on average from 2010 to 2019 for 7.6% of EU28 agricultural exports to developed countries and 14.6% of imports from developed countries, of which respectively 14.8% and 32.6% for beverages and 17.5% and 9.3% for fish and preparations.

Table 8 - UK's weight in EU28 agricultural trade with developed countries: 2010-19

€ million	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Average
All agricultural products (AAP)											
UK exports	2705	3245	3764	3770	3923	4382	4343	4311	4344	4633	3942
UK imports	3063	3241	3398	3334	3533	4126	3729	3842	3792	3789	3585
Balance	-358	4	366	436	390	256	614	469	552	844	357
UK X/EU X	6.8%	7.3%	7.7%	7.4%	7.9%	8.7%	8.1%	7.5%	7.4%	7.3%	7.6%
UK M/EU28M	16.6%	14.9%	14.7%	13.6%	14.2%	15.3%	14.3%	14.6%	14.0%	14.0%	14.6%
Beverages											
UK exports	1486	1896	2288	2367	2359	2636	2578	2557	2621	2719	2351
UK imports	829	877	977	846	943	1164	982	1074	1090	1096	988
Balance	657	1019	1311	1521	1416	1472	1596	1483	1531	1623	1363
UK X/EU X	13.1%	15.1%	15.7%	15.9%	15.9%	16.1%	15.3%	14.2%	14.1%	13.3%	14.8%
UK M/EU28M	32.7%	33.2%	33.0%	30.4%	32.7%	36.1%	31.0%	32.4%	32.0%	32.0%	32.6%
Fish and preparations (FP)											
UK exports	265	335	290	321	373	306	292	338	262	423	321
UK imports	715	708	790	720	784	919	822	735	776	809	778
Balance	-450	-373	-500	-399	-411	-613	-530	-397	-514	-386	-457
UK X/EU X	18.8%	21.4%	18.3%	19.0%	21.8%	17.5%	15.2%	15.6%	12.1%	17.8%	17.5%
UK M/EU28M	11.4%	10.9%	12.0%	10.1%	10.1%	10.6%	8.4%	7.5%	7.6%	7.7%	9.3%
Balances of all agricultural products less beverages and plus fish and preparations (FP)											
AAP-beverage	-1015	-1015	-945	-1085	-1026	-1216	-982	-1014	-979	-779	-1006
AAP+FP	-808	-369	-134	37	-21	-357	84	72	38	458	-100
AAP+FP-bever	-1465	-1388	-1445	-1484	-1437	-1829	-1512	-1411	-1493	-1165	-1463

Table 9 shows that, as reported in Table 3, the UK accounted on average from 2010 to 2019 for 7.4% of all EU28 agricultural exports to DCs and 11.8% of imports from DCs, of which respectively 24.8% and 24.9% for beverages and 10.4% and 11.4% for fish and preparations.

Table 9 - The UK's weight in EU28 agricultural trade with developing countries: 2010-19

€ million	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Average
Tous produits agricoles											
UK exports	3802	4576	4983	5016	5318	5831	5610	5707	5595	6124	5256
UK imports	8657	9083	9632	9411	9648	10832	10420	10495	10473	10917	9957
Balance	-4855	-4507	-4649	-4395	-4330	-5001	-4810	-4788	-4878	-4793	-4701
UK X/EU X	8.1%	8.0%	7.7%	7.2%	7.4%	7.4%	7.2%	7.1%	7.1%	6.9%	7.4%
UK M/EU28M	12.8%	11.6%	11.9%	11.9%	11.9%	12.2%	11.8%	11.3%	11.5%	11.6%	11.8%
Boissons											
UK exports	2047	2621	2833	2639	2624	2809	2535	2578	2777	2904	2637
UK imports	581	552	575	588	618	720	697	691	767	813	660
Balance	1466	2069	2258	2051	2006	2089	1838	1887	2010	2091	1977
UK X/EU X	28.8%	28.8%	27.4%	25.7%	25.4%	25.3%	23.1%	21.7%	22.5%	22.4%	24.8%
UK M/EU28M	26.0%	24.1%	24.2%	21.6%	24.9%	27.0%	25.4%	24.9%	25.6%	25.4%	24.9%

Poissons et préparations											
UK exports	120	133	209	248	310	270	287	315	322	329	254
UK imports	1109	1297	1388	1545	1549	1586	1679	1672	1599	1754	1518
Balance	-989	-1164	-1179	-1297	-1239	-1316	-1392	-1357	-1277	-1425	-1264
UK X/EU X	7,4%	7,2%	8,8%	10,7%	12,8%	10,8%	11,1%	11,2%	11,1%	10,7%	10,4%
UK M/EU28M	10,2%	10,8%	11,6%	12,7%	12,1%	12,0%	11,9%	10,9%	10,4%	11,2%	11,4%
Soldes de tous produits agricoles (TPA) - boissons (B) et + poissons et préparations (PP)											
AAP-beverage	-6321	-6576	-6907	-6446	-6336	-7090	-6648	-6675	-6888	-6884	-1677
AAP+FP	-5844	-5671	-5828	-5692	-5569	-6317	-6202	-6145	-6155	-6218	-5964
AAP+FP-bever	-7310	-7740	-8086	-7743	-7575	-8406	-8040	-8032	-8165	-8309	-7941

## **II - EU28 and UK food trade from 2010 to 2019**

### **2.1 - EU28 food trade from 2010 to 2019**

EU28 food trade according to the SITC nomenclature (codes 0, 11, 22, 4) is more precise than that of the HS nomenclature for agricultural products because the former contains fish and preparations but excludes all non-food agricultural products. Table 10 details EU28 food trade according to a few categories of partners: extra-EU28, with developed countries, developing countries (DCs), ACP (African-Caribbean-Pacific) countries associated with the EU in the Cotonou Convention (which expired on 28 February 2020), SSA (Sub-Saharan Africa) countries, Maghreb countries and West African (WA) countries. However, in order not to overload the following graphs, ACP and Maghreb countries are not included.

While the extra-EU28 agricultural surplus was €30.3 bn in 2019 and €9.7 bn without the fish deficit (Table 1), the food surplus (Table 10) was only €4.6 bn, a surplus for the first time since on average from 2010 to 2019 there was a food deficit of €6.7 bn.

However, without the €27 bn surplus in beverages (after €24.6 bn in 2018) – which are not basic food products – food trade was in deficit by €22.3 bn, a deficit that fell by €7.4 bn over 2018 (€29.7 bn), the average deficit from 2010 to 2019 having been €27.7 bn. It should be noted that this deficit without beverages is significantly higher than the €17 bn calculated according to the HS nomenclature for agricultural products without beverages (Table 1 above). But if we remove tropical beverages – coffee, cocoa, tea, plus spices (CCTS), which are also not basic food products, for which the EU28 had a deficit of €8.8 bn in 2019 – the deficit without beverages and CCTS was €13.6 bn, after €20.6 bn in 2018 and an average of €18.2 bn from 2010 to 2019.

On the other hand, trade with developed countries shows a strong surplus – of €23.4 bn in 2019, after €19.2 bn in 2018 and an average of €17.7 bn from 2010 to 2019 – but falls to €6.5 bn without beverages (compared to €4.1 bn in 2018 and an average of €5 bn), and even to €4.3 bn without CCTS (€3 bn on average).

As a result, the EU28 had a deficit vis-à-vis developing countries (DCs) of €18.8 bn in 2019 (€24.4 bn on average in 2010-19), €28.8 bn without beverages (€32.6 bn on average in 2010-19) and, as DCs had a surplus of €6.7 bn on CCTS in 2019, the EU28 deficit without beverages and CCTS was still €17.9 bn (€21.2 bn on average in 2010-19). Nevertheless the EU boasts about its food deficit with DCs, arguing that it creates outlets and therefore growth and jobs there, without taking into account that it also increases their food deficit and destroys their environment, particularly through the EU soybean and palm oil imports.

With Sub-Saharan Africa (SSA), the U28 had a food deficit of €4.6 bn in 2019 (€4.1 bn on average in 2010-19), but if we exclude the €408 m surplus in beverages and the €6.6 bn deficit in CCTS, without them the EU28 had a surplus of €992 m (€2.5 bn on average in 2010-19).

The EU28 food surplus over the Maghreb of €1.792 bn in 2019 was reduced to €1.721 bn without beverages and, as the EU also has a surplus of €281 m in CCTS, without these two surpluses, the net surplus was €1.340 bn (€2.6 bn on average for 2010-19).

The EU28 food deficit of €2.740 bn with WA in 2019 has been reduced to €2.233 bn without beverages. But without the huge deficit of €4.975 bn in CCTS, the EU28 had a surplus of €2.235 bn and, without the surpluses in beverages and CCTS, the EU28 total surplus was €1.728 bn (as also on average 2010-19).

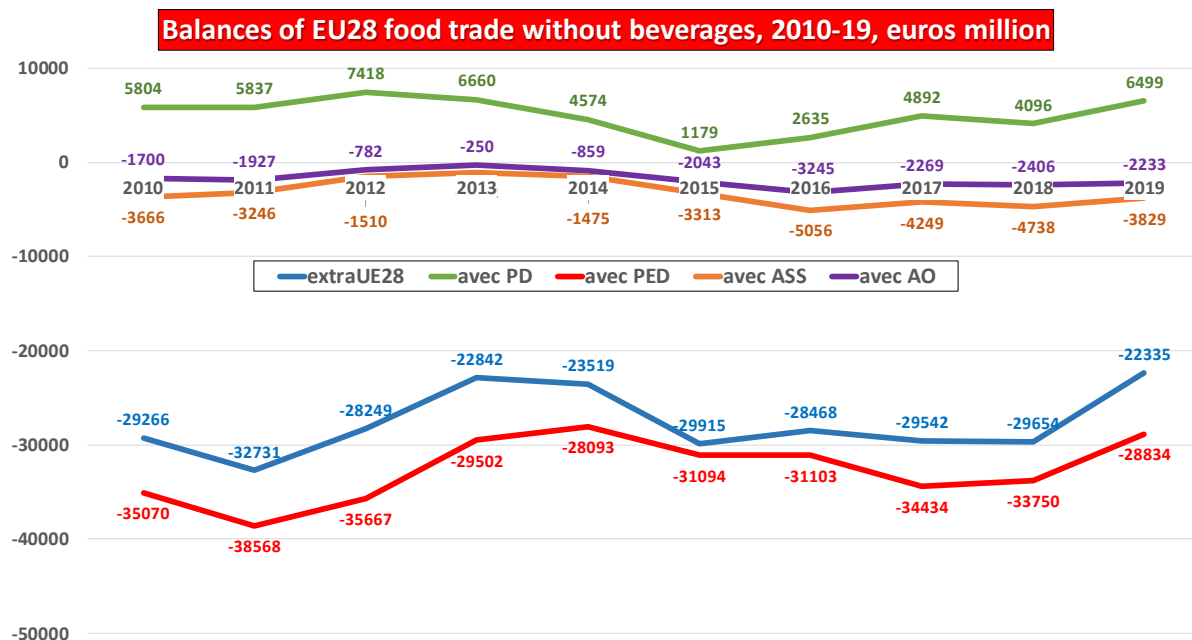
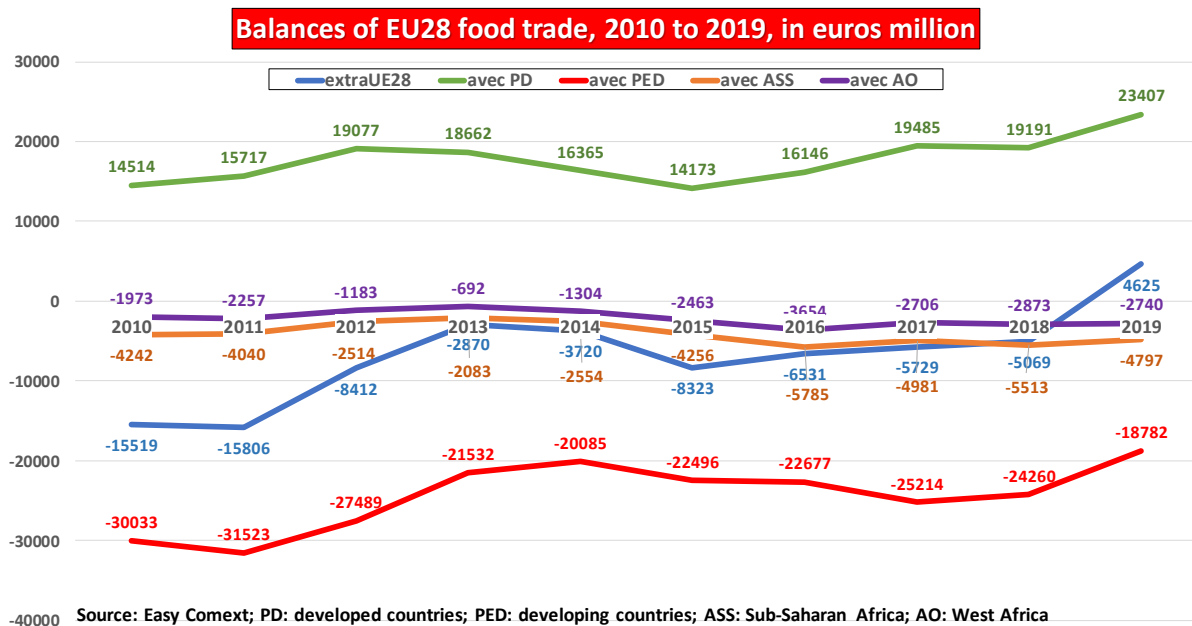


Table 10 – Extra-EU28 food trade from 2010 to 2019, in euros million

€ million	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Average
Extra-EU28 food trade											
EU28 exports	76008	89366	100000	105975	108708	114564	117658	123446	123509	136564	109580
EU28 imports	91527	105172	108412	108845	112428	122887	124189	129175	128578	131939	116315
Balance	-15519	-15806	-8412	-2870	-3720	-8323	-6531	-5729	-5069	4625	-6735
" in beverages	13747	16925	19837	19972	19799	21592	21937	23813	24585	26960	20917

" less beverages	-29266	-32731	-28249	-22842	-23519	-29915	-28468	-29542	-29654	-22335	-27652
" in CCTS	-8223	-11015	-9360	-7395	-8323	-10795	-10993	-10294	-9034	-8766	-9420
" less CCTS	-7296	-4791	948	4525	4603	2472	4462	4565	3965	13391	2684
" lessbev&CCTS	-21043	-21716	-18889	-15447	-15196	-19120	-17475	-19248	-20620	-13569	-18232
Trade with developed countries											
EU28 exports	36591	40842	45195	46816	45740	46385	48882	52294	53200	57519	47346
EU28 imports	22077	25125	26118	28154	29375	32212	32736	32809	34009	34113	29673
Balance	14514	15717	19077	18662	16365	14173	16146	19485	19191	23407	17674
" in beverages	8710	9880	11659	12002	11791	12994	13511	14593	15095	16908	12714
" less beverages	5804	5837	7418	6660	4574	1179	2635	4892	4096	6499	4959
" in CCTS	1894	2038	1989	1767	1784	1736	1967	2109	2067	2207	1956
" less CCTS	12620	13679	17088	16895	14581	12437	14179	17376	17124	21200	15718
" lessbev&CCTS	3910	3799	5429	4893	2790	-557	668	2783	2029	4292	3004
Trade with developing countries											
EU28 exports	39417	48524	54805	59159	62968	68179	68776	71152	70309	79045	62233
EU28 imports	69450	80047	82294	80691	83053	90675	91453	96366	94569	97826	86642
Balance	-30033	-31523	-27489	-21532	-20085	-22496	-22677	-25214	-24260	-18782	-24409
" in beverages	5037	7045	8178	7970	8008	8598	8426	9220	9490	10052	8202
" less beverages	-35070	-38568	-35667	-29502	-28093	-31094	-31103	-34434	-33750	-28834	-32612
" in CCTS	-10117	-13053	-11349	-9162	-10107	-12531	-12960	-12403	-11101	-10973	-11376
" less CCTS	-19916	-18470	-16140	-12370	-9978	-9965	-9717	-12811	-13159	-7809	-13034
" lessbev&CCTS	-24953	-25515	-24318	-20340	-17986	-18563	-18143	-22031	-22649	-17861	-21236
Trade with ACP countries											
EU28 exports	6930	8163	9101	9561	9852	9921	9295	10004	9405	10339	9257
EU28 imports	12063	13349	12779	12686	13398	15196	16072	15983	15655	15929	14311
Balance	-5133	-5186	-3678	-3125	-3546	-5275	-6777	-5979	-6250	-5590	-5054
" in beverages	544	797	1038	1073	1125	1029	797	801	839	1012	906
" less beverages	-4589	-4389	-2640	-2052	-2421	-4246	-5980	-5178	-5411	-4578	-4148
" in CCTS	-5368	-6131	-5148	-4571	-5188	-6582	-7358	-6827	-6536	-6825	-6053
" less CCTS	235	945	1470	1446	1642	1307	581	848	286	1235	1000
" lessbev&CCTS	-4354	-3444	-1170	-606	-779	-2939	-5399	-4330	-5125	-3343	-3149
Trade with Sub-Saharan Africa (SSA)											
EU28 exports	6416	7640	8511	8945	9172	9154	8512	9142	8519	9407	8542
EU28 imports	10658	11680	11025	11028	11726	13410	14297	14123	14032	14204	12618
Balance	-4242	-4040	-2514	-2083	-2554	-4256	-5785	-4981	-5513	-4797	-4077
" in beverages	576	794	1004	1041	1079	943	729	732	775	968	864
" less beverages	-3666	-3246	-1510	-1042	-1475	-3313	-5056	-4249	-4738	-3829	-3212
" in CCTS	-5182	-5908	-4952	-4439	-5036	-6391	-7119	-6650	-6374	-6656	-5871
" less CCTS	940	1868	2438	2356	2482	2135	1334	1669	861	1859	1794
" lessbev&CCTS	1516	2662	3442	3397	3561	3078	2063	2401	1636	891	2465
Trade with Maghreb (5 countries)											
EU28 exports	5179	6376	6633	7438	8319	8213	7456	6373	6863	7303	7015
EU28 imports	2910	3160	3115	3420	3477	4463	4569	4963	5349	5511	4094
Balance	2269	3216	3518	4018	4842	3750	2887	1410	1514	1792	2922
" in beverages	99	88	162	173	170	159	145	142	157	171	147
" less beverages	2170	3128	3356	3845	4672	3591	2742	1268	1357	1621	2775
" in CCTS	117	134	197	206	200	227	199	172	209	281	194
" less CCTS	2152	3082	3321	3812	4642	3523	2688	1238	1305	1511	2727
" lessbev&CCTS	2053	2994	3159	3639	4472	3364	2543	1096	1148	1340	2581
Trade with West Africa (WA)											
EU28 exports	2813	3153	3611	3835	3931	3953	3504	4028	3856	4232	3692
EU28 imports	4786	5410	4794	4527	5235	6416	7158	6734	6729	6972	5876
Balance	-1973	-2257	-1183	-692	-1304	-2463	-3654	-2706	-2873	-2740	-2185
" in beverages	273	330	401	442	445	420	409	437	467	507	413
" less beverages	-1700	-1927	-782	-250	-859	-2043	-3245	-2269	-2406	-2233	-1771
" in CCTS	-3691	-4213	-3548	-3208	-3740	-4799	-5417	-4882	-4730	-4975	-4320
" less CCTS	1718	1956	2365	2516	2436	2336	1763	2176	1857	2235	2136
" lessbev&CCTS	1445	1626	1964	2074	1991	1916	1354	1739	1390	1728	1723

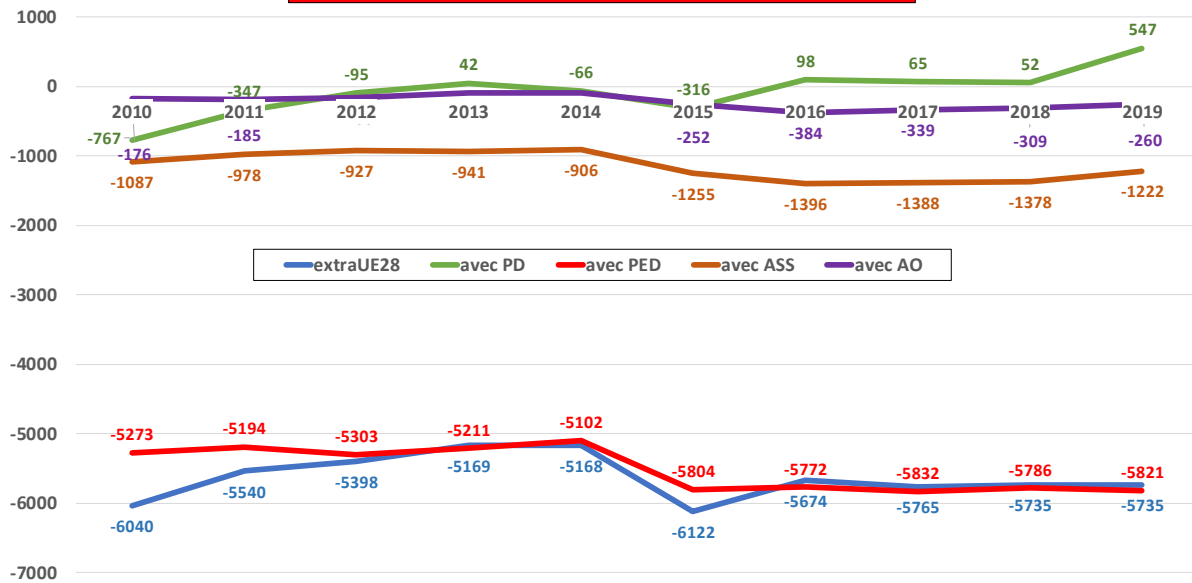
Source: Easy Comext; CCTS: coffee+cocoa+tea+spices

## 2.2 - UK food trade from 2010 to 2019

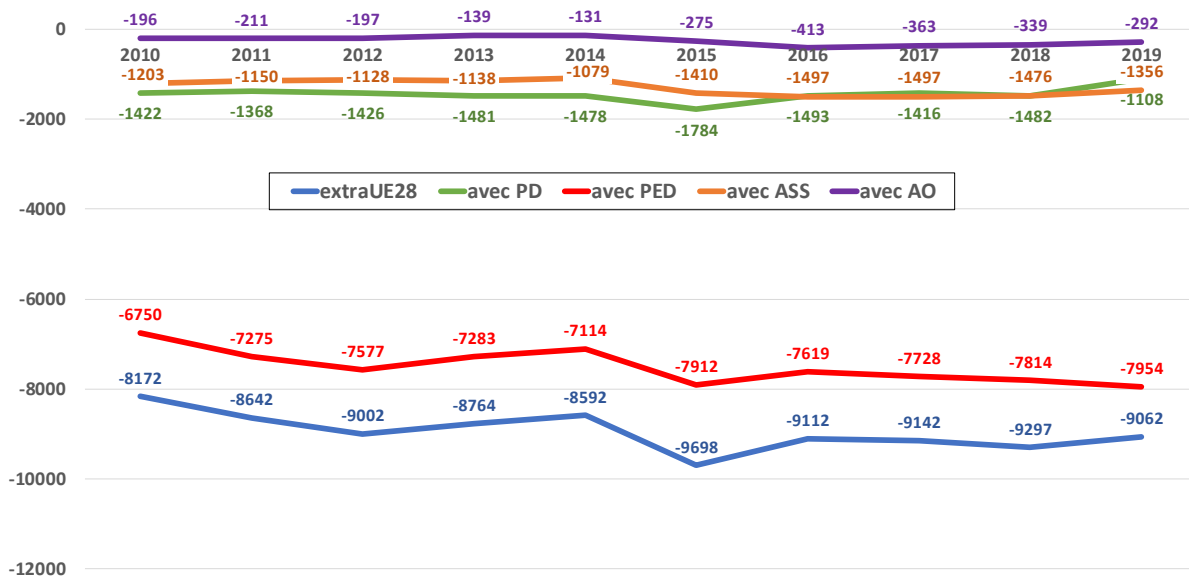
The UK runs a deficit in its food trade with all the partners identified here, even practically with the developed countries on average 2010-19 (by €78 m) despite a surplus of €547 m in 2019. The deficit with developing countries (€5.8bn in 2019 and an average of €5.5 bn from 2010 to 2019) exceeds the extra-EU28 deficit (€5.7bn in 2019 despite an average of €5.6 bn from 2010 to 2019) but, without beverages, the extra-EU28 deficit (€9.1 bn in 2019 and an average of €8.9 bn) exceeds that with developing countries (€8 bn in 2019 and an average of €7.5 bn). As the UK's surplus in beverages is small over SSA including WA, there is little difference in its deficits with or without beverages.



**Balances of UK food trade, 2010-19, euros million**



**Balances of UK food trade without beverages, 2010-19, euros million**



**Table 11 – UK food trade from 2010 to 2019, in euros million**

€ million	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Average
Extra-EU28 food trade											
UK exports	6418	7717	8676	8759	92926	10150	9941	10077	10005	11025	17569
UK imports	12458	13257	14074	13928	14461	16272	15615	15842	15740	16300	14795
Balance	-6040	-5540	-5398	-5169	-5168	-6122	-5674	-5765	-5735	-5275	-5589
" in beverages	2132	3102	3604	3595	3424	3576	3438	3377	3562	3787	3360
" less beverages	-8172	-8642	-9002	-8764	-8592	-9698	-9112	-9142	-9297	-9062	-8948
" in CCTS	-787	-902	-884	-686	-665	-956	-947	-910	-859	-817	-841
" less CCTS	-5253	-4638	-4514	-4483	-4503	-5166	-4727	-4855	-4876	-4458	-4748
" lessbev&CCTS	-7385	-7740	-8118	-8078	-7927	-8742	-8165	-8232	-8438	-8245	-8107
Trade with developed countries											
UK exports	2791	3379	3844	3872	4030	4440	4403	4409	4402	4867	4044
UK imports	3558	3726	3939	3830	4096	4756	4305	4344	4350	4320	4122
Balance	-767	-347	-95	42	-66	-316	98	65	52	547	-78
" in beverages	655	1021	1331	1523	1412	1468	1591	1481	1534	1655	1367
" less beverages	-1422	-1368	-1426	-1481	-1478	-1784	-1493	-1416	-1482	-1108	-1446
" in CCTS	136	100	99	148	159	135	122	128	133	122	128

" less CCTS	-903	-447	-194	-106	-225	-451	-24	-63	-81	425	-136	
" lessbev&CCTS	-519	-921	-1232	-1375	-1253	-1333	-1469	-1353	-1401	-1533	-1239	
Trade with developing countries												
UK exports	3627	4338	4833	4887	5263	5711	5538	5667	5604	6158	5163	
UK imports	8900	9532	10136	10098	10365	11515	11310	11499	11390	11979	10672	
Balance	-5273	-5194	-5303	-5211	-5102	-5804	-5772	-5832	-5786	-5821	-5510	
" in beverages	1477	2081	2274	2072	2012	2108	1847	1896	2028	2133	1993	
" less beverages	-6750	-7275	-7577	-7283	-7114	-7912	-7619	-7728	-7814	-7954	-7503	
" in CCTS	-923	-1001	-983	-834	-823	-1091	-1069	-1038	-992	-939	-969	
" less CCTS	-4350	-4193	-4320	-4377	-4279	-4713	-4703	-4794	-4794	-4882	-4541	
" lessbev&CCTS	-5827	-6274	-6594	-6449	-6291	-6821	-6550	-6690	-6822	-7015	-6534	
Trade with ACP countries												
UK exports	622	685	789	806	859	865	753	749	723	771	762	
UK imports	2028	2094	2178	2242	2271	2588	2480	2450	2332	2267	2293	
Balance	-1406	-1409	-1389	-1436	-1412	-1723	-1727	-1701	-1609	-1496	-1531	
" in beverages	145	219	246	229	213	224	165	161	140	156	190	
" less beverages	-1551	-1628	-1635	-1665	-1625	-1947	-1892	-1862	-1749	-1652	-1721	
" in CCTS	-461	-450	-420	-333	-354	-497	-570	-528	-496	-476	-459	
" less CCTS	-945	-959	-969	-1103	-1058	-1226	-1157	-1173	-1113	-1020	-1072	
" lessbev&CCTS	-461	-450	-420	-333	-354	-497	-570	-528	-496	-476	-459	
Trade with Sub-Saharan Africa (SSA)												
UK exports	531	585	686	713	753	713	607	611	594	637	643	
UK imports	1618	1563	1613	1654	1659	1968	2003	1999	1972	1859	1791	
Balance	-1087	-978	-927	-941	-906	-1255	-1396	-1388	-1378	-1222	-1148	
" in beverages	116	172	201	197	173	155	101	109	98	134	146	
" less beverages	-1203	-1150	-1128	-1138	-1079	-1410	-1497	-1497	-1476	-1356	-1293	
" in CCTS	-457	-449	-421	-335	-356	-497	-570	-525	-496	-476	-458	
" less CCTS	-630	-529	-506	-606	-550	-758	-826	-863	-882	-746	-690	
" lessbev&CCTS	-746	-701	-707	-803	-723	-913	-927	-972	-980	-880	-835	
Trade with Maghreb (5 countries)												
UK exports	220	188	228	264	352	270	323	145	153	249	239	
UK imports	242	280	296	292	293	327	359	339	371	423	322	
Balance	-22	-92	-68	-28	59	-57	-36	-194	-218	-174	-83	
" in beverages	21	20	23	22	21	22	22	24	22	30	23	
" less beverages	-43	-112	-91	-50	38	-79	-58	-218	-240	-204	-106	
" in CCTS	0	3	5	6	10	6	4	2	2	12	5	
" less CCTS	-22	-95	-73	-34	49	-63	-40	-196	-220	-186	-88	
" lessbev&CCTS	-43	-115	-96	-56	28	-85	-62	-220	-242	-216	-111	
Trade with West Africa (WA)												
UK exports	182	189	225	249	282	246	201	194	195	207	217	
UK imports	358	374	385	341	377	498	585	533	504	467	442	
Balance	-176	-185	-160	-92	-95	-252	-384	-339	-309	-260	-225	
" in beverages	20	26	37	47	36	23	29	24	30	32	30	
" less beverages	-196	-211	-197	-139	-131	-275	-413	-363	-339	-292	-256	
" in CCTS	-212	-217	-220	-175	-206	-271	-340	-277	-277	-266	-246	
" less CCTS	36	32	60	83	111	19	-44	-62	-32	6	21	
" lessbev&CCTS	16	6	23	36	75	-4	-73	-86	-62	-26	-10	

Source: Easy Comext; CCTS: coffee+cocoa+tea+spices

### **2.3 - Weight of the UK in intra-EU28 food trade from 2010 to 2019**

The graphs linked to Tables 12 to 14 illustrate the weight of the UK in total intra-EU28 food trade, of which beverages and fish, which is different depending on whether one considers intra-EU28 trade linked to exports or to imports. The UK has a much higher weight in import-related than export-related intra-EU28 trade in both total food and beverage trade, and this weight has not changed significantly from 2010 to 2019 for total food trade, while it has decreased for export-related trade in beverages and fish. This also means that food (and agricultural) trade within the EU28 and not only extra-EU28 trade should be taken into account when assessing the impact of Brexit on both the EU27 and the UK.

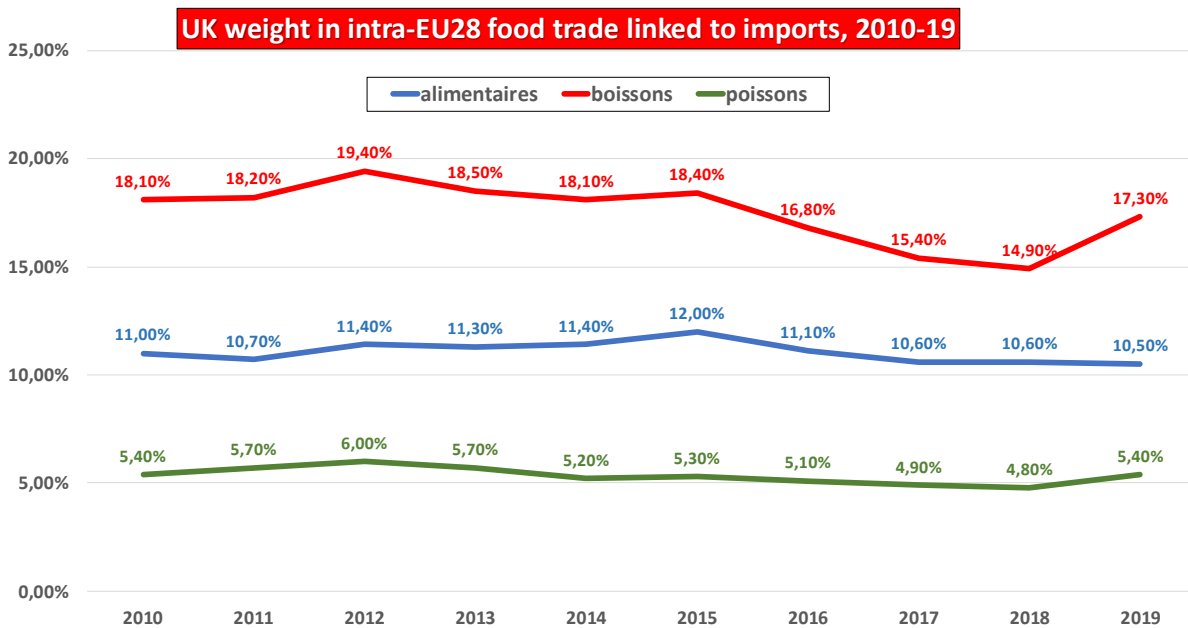
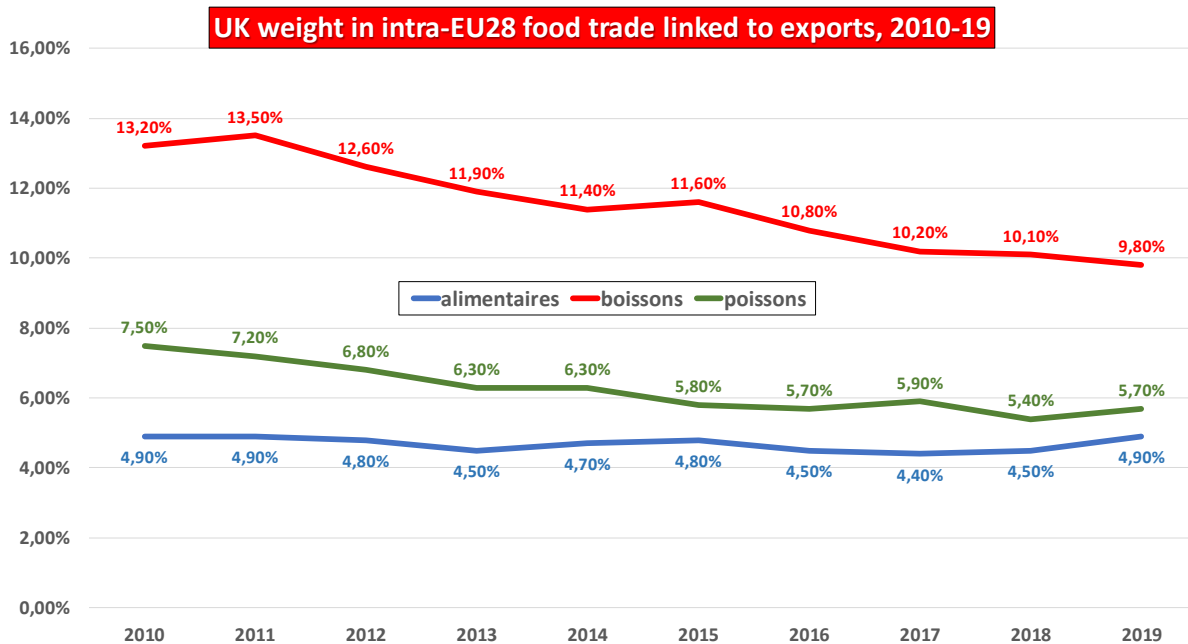


Table 12 - UK share of intra-EU28 food trade: 2010-19

€ million	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Average
UK share of intra-EU28 food trade linked to exports											
Intra-EU28	252909	277887	293111	307082	309949	322833	333161	353288	357343	3651211	317268
UK in intra-EU28	12460	13624	14130	13911	14533	15395	15035	15452	16065	17769	14837
UK/EU28	4,9%	4,9%	4,8%	4,5%	4,7%	4,8%	4,5%	4,4%	4,5%	4,9%	4,7%
UK share of intra-EU28 food trade linked to imports											
Intra-EU28	248196	273454	287647	300500	304396	318897	329428	350414	355223	363595	313175
UK in intra-EU28	27197	29377	32736	33843	34744	38271	36513	37285	37750	38099	34582
UK/EU28	11,0%	10,7%	11,4%	11,3%	11,4%	12,0%	11,1%	10,6%	10,6%	10,5%	11,0%

Table 13 – UK share of intra-EU28 beverages trade: 2010-19

Millions d'€	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Average
UK share of intra-EU28 beverages trade linked to exports											
Intra-EU28	22608	24179	25706	26665	26817	27722	28608	29897	31759	35123	27908
UK in intra-EU28	2975	3261	3249	3162	3053	3221	3079	3035	3207	3430	3167
UK/EU28	13,2%	13,5%	12,6%	11,9%	11,4%	11,6%	10,8%	10,2%	10,1%	9,8%	11,2%
UK share of intra-EU28 beverages trade linked to imports											
Intra-EU28	21693	23414	24870	25231	25693	26653	27692	28744	30330	30079	26440
UK in intra-EU28	3936	4266	4813	4666	4639	4913	4661	4418	4514	5203	4603
UK/EU28	18,1%	18,2%	19,4%	18,5%	18,1%	18,4%	16,8%	15,4%	14,9%	17,3%	17,4%

Table 14 – UK share of intra-EU28 fish trade: 2010-19

Millions d'€	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	Average
UK share of intra-EU28 fish trade linked to exports											
Intra-EU28	15702	16984	16982	18067	19372	21152	23881	24792	25394	25497	20782
UK in intra-EU28	1181	1218	1159	1147	1214	1226	1351	1461	1382	1463	1280
UK/EU28	7.5%	7.2%	6.8%	6.3%	6.3%	5.8%	5.7%	5.9%	5.4%	5.7%	6.2%
UK share of intra-EU28 fish trade linked to imports											
Intra-EU28	15012	16186	16266	17297	18356	19573	22325	23284	23690	23381	19537
UK in intra-EU28	814	919	984	994	952	1032	1143	1148	1136	1262	1038
UK/EU28	5.4%	5.7%	6.0%	5.7%	5.2%	5.3%	5.1%	4.9%	4.8%	5.4%	5.3%

## Conclusion

Despite the strong increase in the EU28's agricultural trade balance in 2019, it is dubious that DG Agriculture will change its recurrent discourse on its capacity not only to ensure EU food security but also to contribute to feeding the hungry in developing countries, since it equates the balance of its agricultural trade with the balance of its food trade.

This hoax spread by DG Agriculture led the previous President of the European Commission, Jean-Claude Juncker, to declare on 6 December 2016, in his opening speech at the conference on the EU's agricultural prospects: "*We must remember – but who remembers? – that until 1964 Europe was not yet self-sufficient in terms of food... A country, a continent which cannot feed itself, from a geostrategic point of view, is a country, even a continent, in perdition because it depends on the will of others. I do not want a Europe that depends on the will of others... With the entry into force of the common agricultural policy in 1962, Europe has given itself the means to acquire its autonomy in terms of food production. And we can actually be proud of the journey made since*"<sup>1</sup>.

He echoed the previous EU Commissioner on agriculture Phil Hogan's speech on 4 June 2015 at the Milan World Expo: "*I know you are all very familiar with the key data on present and future challenges, with some 795 million people worldwide still suffering from chronic hunger. And with global population growth continuing rapidly, the world will have to produce 60% more food by 2050... Today I wish to deliver the clear and decisive message that the European Union recognises its global responsibilities and is ready to act*"<sup>2</sup>.

The European Court of Auditors itself has shared this assertion by stating in March 2018 that "*The EU produces more food than it consumes, and has become a net food exporter*"<sup>3</sup>.

Nevertheless, thanks to its very high agricultural subsidies, combined with very high customs duties on its basic food products<sup>4</sup>, the EU receives massive structural food aid from the developing countries, since it is largely in deficit, especially if we eliminate its trade in beverages that are not basic food products.

<sup>1</sup> [http://europa.eu/rapid/press-release\\_SPEECH-16-4285\\_fr.htm](http://europa.eu/rapid/press-release_SPEECH-16-4285_fr.htm)

<sup>2</sup> [http://ec.europa.eu/agriculture/commissioner-speeches/pdf/hogan-expo-milan-04-06-2015\\_en.pdf](http://ec.europa.eu/agriculture/commissioner-speeches/pdf/hogan-expo-milan-04-06-2015_en.pdf)

<sup>3</sup> [https://www.eca.europa.eu/Lists/ECADocuments/Briefing\\_paper\\_CAP/Briefing\\_paper\\_CAP\\_EN.pdf](https://www.eca.europa.eu/Lists/ECADocuments/Briefing_paper_CAP/Briefing_paper_CAP_EN.pdf)

<sup>4</sup> *From customs duties to total agricultural protection: the case of the European Union-West Africa trade*, SOL, April 19, 2018 (<https://www.sol-asso.fr/wp-content/uploads/2019/01/From-customs-duties-to-total-agricultural-protection.-April-19-2018.pdf>)