



## **The EU28 agricultural trade and food trade from 2010 to 2019**

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As Eurostat (Easy Comext) data on EU28 trade so far only cover the first 11 months of 2019, EU28 trade for 2019 has been estimated by multiplying the sum of the first 11 months of 2019 by the ratio of exports in 2018 to exports in the first 11 months of 2018. Differences with the final 2019 data are not expected to be significant. Agricultural trade – as defined by the WTO Agreement on Agriculture (AoA) – will be analysed with Harmonized System (HS) data and food trade with SITC (Standard International Trade Classification) data.

### **I – The EU28 agricultural trade from 2010 to 2019**

DG Agriculture will soon be boasting the brilliant results of its so-called *agri-food* trade in 2019, with exports reaching €150 billion (€150bn) after €137.7bn in 2018, with a surplus of €29.6bn (compared to €19.5 bn in 2018). In reality these cover only *agricultural* trade, forgetting that fish and preparations are an essential food product, with a growing deficit balance reaching €20.6bn in 2019, so that the *agri-food* surplus was still €9bn, compared to a deficit of €1bn in 2018 after decreasing deficits since 2015 (€4.3bn).

Not including fish and preparations in *agri-food* trade is all the more incoherent because, although there is an EU common fisheries policy, it only concerns the conservation and sustainable exploitation of fish 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, and the funds allocated to fisheries in the EU's ultra-marine regions come under POSEI, one of the chapters of the EAGF.

Since beverages are not a basic food product and their growing surplus reached €26.8bn in 2019, without beverages the EU28's agricultural surplus was only €2.9bn in 2019, after a deficit of €5bn in 2018. Adding the fish deficit, the EU28 had a net '*agri-food*' deficit of €17.7bn in 2019 (an improvement on the deficit of €25.5bn in 2018).

The EU28 has always had a surplus in its agricultural trade with developed countries – assimilated to the western OECD countries (Australia, Canada, Iceland, Israel, Japan, Norway, New Zealand, Switzerland, United States) plus Russia – with a surplus of €36.2bn in 2019 (after 31.3bn in 2018), including €26.8bn for beverages (after €24.6bn in 2018), even though it has always been in deficit in fish (by €8.1bn in 2019 as in 2018), so that its *agri-food* surplus without beverages and fish was limited to €11.1bn in 2019.

As a result, the EU28 continued to run a deficit in agricultural trade with developing countries (DCs) of €6.6bn in 2019 (after €11.8bn in 2018), but still had a surplus of €9.8bn on beverages, so that without beverages the EU28 deficit was €3bn. However, as the EU28 remained in a deficit of €12.5bn in fish trade, its net *agri-food* deficit with developing countries was €9.8bn (€9.3bn in 2018).

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

€ million	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	19/18	19/10
All agricultural products (AAP)												
EU28 exports	87007	101286	113418	120095	121861	129347	131455	137734	137693	151008	110%	174%
EU28 imports	86222	100178	103953	103670	106124	115948	114486	118843	118169	121400	103%	141%
Balance	785	1108	9465	16425	15737	13399	16969	18891	19524	29608	152%	3772%
Beverages												
EU28 exports	18455	21713	24961	25158	25141	27469	27841	29930	30958	33350	108%	181%
EU28 imports	4772	4929	5337	5501	5360	5889	5913	6088	6403	6594	103%	138%
Balance	13683	16784	19624	19657	19781	21580	21928	23842	24555	26756	109%	196%
Fish and preparations (FP)												
EU28 exports	3030	3421	3960	4007	4132	4241	4492	4968	5071	5463	108%	180%
EU28 imports	17141	18534	18537	19251	20531	21901	23911	25206	25587	26060	102%	152%
Balance	-14111	-15113	-14577	-15244	-16399	-17660	-19419	-20238	-20516	-20597	100%	146%
Balances of all agricultural products (AAP) – beverages (B) + fish and preparations (FP)												
AAP-beverages	-12898	-15676	-10159	-3232	-4044	-8181	-4959	-4951	-5031	2852	-57%	-22%
AAP+FP	-13326	-14005	-5112	1181	-662	-4261	-2450	-1347	-992	9011	-908%	-68%
AAP+FP-bever	-27009	-30789	-24736	-18476	-20443	-25841	-24378	-25189	-25547	-17745	69%	66%

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

€ million	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	19/18	19/10
All agricultural products (AAP)												
EU28 exports	39907	44352	49099	50756	49817	50780	53607	57209	58409	63305	108%	159%
EU28 imports	18434	21775	23046	24431	24961	27005	26147	26300	27118	27136	100%	147%
Balance	21473	22577	26053	26325	24856	23775	27460	30909	31291	36169	116%	168%
Beverages												
EU28 exports	11345	12597	14615	14890	14805	16350	16847	18058	18638	20359	109%	179%
EU28 imports	2535	2638	2958	2780	2882	3222	3172	3310	3408	3385	99%	134%
Balance	8810	9959	11657	12110	11923	13128	13675	14748	15230	16974	111%	193%
Fish and preparations (FP)												
EU28 exports	1413	1569	1589	1688	1714	1747	1915	2160	2165	2420	112%	171%
EU28 imports	6249	6506	6587	7126	7751	8663	9760	9839	10243	10493	102%	168%
Balance	-4836	-4937	-4998	-5438	-6037	-6916	-7845	-7679	-8078	-8073	100%	167%
Balances of all agricultural products (AAP) – beverages (B) + fish and preparations (FP)												
AAP-beverages	12663	12618	14396	14215	12933	10647	13785	16161	16061	19195	120%	152%
AAP+FP	16637	17640	21055	20887	18819	16859	19615	23230	23213	28096	121%	169%
AAP+FP-bever	7827	7681	9398	8777	6896	3731	5940	8482	7983	11122	139%	142%

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

€ million	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	19/18	19/10
All agricultural products (AAP)												
EU28 exports	47100	56934	64319	69339	72044	78567	77848	80525	79284	87703	111%	186%
EU28 imports	67788	78403	80907	79239	81163	88943	88339	92543	91051	94264	104%	139%
Balance	-20688	-21469	-16588	-9900	-9119	-10376	-10491	-12018	-11767	-6561	56%	32%
Beverages												
EU28 exports	7110	9116	10346	10268	10336	11119	10994	11872	12320	12991	105%	183%
EU28 imports	2237	2291	2379	2721	2478	2667	2741	2778	2995	3209	107%	143%
Balance	4873	6825	7967	7547	7858	8452	8253	9094	9325	9782	105%	201%
Fish and preparations (FP)												
EU28 exports	1617	1852	2371	2319	2418	2494	2577	2808	2906	3043	104%	188%
EU28 imports	10892	12028	11950	12125	12780	13238	14151	15367	15344	15567	101%	143%
Balance	-9275	-10176	-9579	-9806	-10362	-10744	-11574	-12559	-12438	-12524	101%	135%
Balances of all agricultural products (AAP) – beverages (B) + fish and preparations (FP)												
AAP-beverages	-25561	-28294	-24555	-17447	-16977	-18828	-18744	-21112	-21092	-16343	77%	64%
AAP+FP	-29963	-31645	-26167	-19706	-19481	-21120	-22065	-24577	-24205	-19085	79%	64%
AAP+FP-bever	-25090	-24820	-18200	-12159	-11623	-12668	-13812	-15483	-14880	-9303	86%	83%

## **II – The EU28 food trade from 2010 to 2019**

The EU28 food trade according to the SITC nomenclature (codes 0, 11, 22, 4) is more precise than that of the HS nomenclature because the former contains fish and preparations but excludes all non-food agricultural products.

Extra-EU28 food trade was in surplus for the first time in 2019 (by €3.959bn), but excluding beverages – which are not basic food products – it was in deficit by €23bn, a deficit fallen by €6.5 bn over 2018. It should be noted that this deficit without beverages is significantly higher than the €17.7bn calculated according to the HS nomenclature for agricultural products (Table 1 above). If, in addition, tropical beverages – coffee, cocoa, tea – plus spices (CTS), which are not basic food products either, especially in exporting countries, are removed, the deficit was €31.9bn.

On the other hand, trade with developed countries is in strong surplus (€19.7bn in 2019), but falls to €2.8bn without beverages, and even to €607 million without CCTS.

As a result, the EU28 had a deficit with developing countries (DCs) of €15.8bn in 2019, €25.8bn without beverages and, as DCs had a surplus of €6.7bn in CCTS, the deficit without beverages and CCTS was still €29bn. In fact the EU boasts about its food deficit with DCs, arguing that this contributes to creating outlets and therefore growth and jobs for them, without taking into account that it also increases their food deficit and destroys the environment, in particular through its soya and palm oil imports, without forgetting child labour (cocoa in West Africa).

With the ACP countries – African, Caribbean and Pacific countries, partners of the Cotonou Agreement which expires this month – the EU28 deficit was €5.6 billion in 2019 and €4.6bn without beverages. But as the deficit on CCTS was €6.8bn, without CCTS the EU had a surplus of €1.2bn. In total without the drinks surplus and the deficit on CCTS, the deficit was €3.3bn.

With the countries of Sub-Saharan Africa (SSA) the U28 had a food deficit of €4.8bn in 2019, a deficit reduced to €3.8bn due to its surplus in beverages. However, as it had a deficit of €6.8bn in CCTS, without them the EU28 had a surplus of €1.2bn. Finally, without the beverages surplus and the CCTS deficit, the EU would have had a surplus of €891m in 2019.

The EU28's food surplus over the Maghreb of €1.792bn in 2019 was reduced to €1.721bn without beverages and, as the EU also has a surplus of €281bn in CCTS, without these two surpluses, the net surplus would have been €1.340bn.

The EU28's food deficit of €2.740bn with West Africa (WA) in 2019 has been reduced to €2.233bn without beverages. But without the huge deficit of €4.975bn in CCTS, the EU had a surplus of €2.235bn, and without the surpluses in beverages and CCTS, the total surplus was €1.728bn.

Table 4 – Extra-EU28 food trade from 2010 to 2019

Millions d'€	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	19/18	19/10
Extra-EU28 food trade												
EU28 exports	76008	89366	100000	105975	108708	114564	117658	123446	123509	135986	110%	179%
EU28 imports	91527	105172	108412	108845	112428	122887	124189	129175	128578	132027	103%	144%
Balance	-15519	-15806	-8412	-2870	-3720	-8323	-6531	-5729	-5069	3959	-78%	-26%
" in beverages	13747	16925	19837	19972	19799	21592	21937	23813	24585	26983	110%	196%
" less beverages	-29266	-32731	-28249	-22842	-23519	-29915	-28468	-29542	-29654	-23024	78%	79%
" CCTS	-8223	-11015	-9360	-7395	-8323	-10795	-10993	-10294	-9034	-8866	98%	108%
" less CCTS	-23742	-26821	-17772	-10265	-12043	-19118	-17524	-16023	-14103	-4907	35%	21%
" less bev+CCTS	-37489	-43746	-37609	-30237	-31842	-40710	-39461	-254151	-38688	-31890	82%	85%
EU28 food trade with developed countries												
EU28 exports	28125	31282	34819	35951	37615	41882	44381	46890	47732	51657	108%	170%
EU28 imports	22077	25125	26118	28154	29375	32212	32736	32809	34009	34115	100%	154%
Balance	6157	8701	7797	8240	9670	11645	14081	13723	17542	19718	112%	285%
" in beverages	8710	9880	11659	12002	11791	12994	13511	14593	15095	16904	112%	194%
" less beverages	-2553	-1179	-3862	-3762	-2121	-1349	570	-870	2447	2814	115%	-111%
" CCTS	1894	2038	1989	1767	1784	1736	1967	2109	2067	2207	107%	117%
" less CCTS	4263	6663	5808	6473	7886	9909	12114	11614	15475	17511	113%	363%
" less bev+CCTS	-4447	-3217	-5851	-5529	-3905	-3085	-1397	-2979	380	607	160%	-14%
EU28 food trade with developing countries												
EU28 exports	47883	58084	65181	70024	71093	72682	73277	76556	75777	84329	111%	176%
EU28 imports	70327	80047	82294	80691	83053	90675	91453	96366	94569	97912	104%	139%
Balance	-21676	-24507	-16209	-11110	-13390	-19968	-20612	-19452	-22611	-15759	70%	73%
" in beverages	5037	7045	8178	7970	8008	8598	8426	9220	9490	10079	106%	200%
" less beverages	-26713	-31552	-24387	-19080	-21398	-28566	-29038	-28672	-32101	-25838	80%	97%
" CCTS	-6329	-8977	-7371	-5628	-6539	-9059	-9026	-8185	-6967	-6659	96%	105%
" less CCTS	-28005	-33484	-23580	-16738	-19929	-29027	-29638	-27637	-29578	-22418	76%	80%
" less bev+CCTS	-34334	-42461	-30951	-22366	-26468	-38086	-38664	-35822	-36545	-29077	80%	85%
EU28 food trade with ACP countries												
EU28 exports	6930	8163	9101	9561	9852	9921	9295	10004	9405	10339	110%	149%
EU28 imports	12063	13349	12779	12686	13398	15196	16072	15983	15655	15929	102%	132%
Balance	-5133	-5186	-3678	-3125	-3546	-5275	-6777	-5979	-6250	-5590	89%	109%
" in beverages	544	797	1038	1073	1125	1029	797	801	839	1012	121%	186%
" less beverages	-4589	-4389	-2640	-2052	-2421	-4246	-5980	-5178	-5411	-4578	85%	100%

" CCTS	-5368	-6131	-5148	-4571	-5188	-6582	-7358	-6827	-6536	-6825	104%	127%
" less CCTS	235	945	1470	1446	1642	1307	581	848	286	1235	432%	526%
" less bev+CCTS	-4354	-3444	-1170	-606	-779	-2939	-5399	-4330	-5125	-3343	65%	77%
EU28 food trade with sub-Saharan Africa												
EU28 exports	6416	7640	8511	8945	9172	9154	8512	9142	8519	9407	110%	147%
EU28 imports	10658	11680	11025	11028	11726	13410	14297	14123	14032	14204	101%	133%
Balance	-4242	-4040	-2514	-2083	-2554	-4256	-5785	-4981	-5513	-4797	87%	113%
" in beverages	576	794	1004	1041	1079	943	729	732	775	968	125%	168%
" less beverages	-3666	-3246	-1510	-1042	-1475	-3313	-5056	-4249	-4738	-3829	81%	104%
" CCTS	-5182	-5908	-4952	-4439	-5036	-6391	-7119	-6650	-6374	-6656	104%	128%
" less CCTS	940	1868	2438	2356	2482	2135	1334	1669	861	1859	216%	198%
" less bev+CCTS	1516	2662	3442	3397	3561	3078	2063	2401	1636	891	54%	59%
EU28 food trade with Maghreb (5 countries)												
EU28 exports	5179	6376	6633	7438	8319	8213	7456	6373	6863	7303	106%	141%
EU28 imports	2910	3160	3115	3420	3477	4463	4569	4963	5349	5511	103%	189%
Balance	2269	3216	3518	4018	4842	3750	2887	1410	1514	1792	118%	79%
" in beverages	99	88	162	173	170	159	145	142	157	171	109%	173%
" less beverages	2170	3128	3356	3845	4672	3591	2742	1268	1357	1621	119%	75%
" CCTS	117	134	197	206	200	227	199	172	209	281	134%	240%
" less CCTS	2152	3082	3321	3812	4642	3523	2688	1238	1305	1511	116%	70%
" less bev+CCTS	2053	2994	3159	3639	4472	3364	2543	1096	1148	1340	117%	65%
EU28 food trade with West Africa												
EU28 exports	2813	3153	3611	3835	3931	3953	3504	4028	3856	4232	110%	150%
EU28 imports	4786	5410	4794	4527	5235	6416	7158	6734	6729	6972	104%	146%
Balance	-1973	-2257	-1183	-692	-1304	-2463	-3654	-2706	-2873	-2740	95%	139%
" in beverages	273	330	401	442	445	420	409	437	467	507	109%	186%
" less beverages	-1700	-1927	-782	-250	-859	-2043	-3245	-2269	-2406	-2233	93%	131%
" CCTS	-3691	-4213	-3548	-3208	-3740	-4799	-5417	-4882	-4730	-4975	105%	135%
" less CCTS	1718	1956	2365	2516	2436	2336	1763	2176	1857	2235	120%	130%
" less bev+CCTS	1445	1626	1964	2074	1991	1916	1354	1739	1390	1728	124%	120%

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

Despite the strong increase in the EU28's agricultural trade balance in 2019, it is not certain that DG Agri will go back on its recurrent talk of its capacity not only to ensure the EU food security but also to help feed the hungry in developing countries. It should be recalled that the former President of the European Commission, Jean-Claude Juncker, stated 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 EU Commissioner on agriculture and now the new Trade Commissioner 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>.

<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)