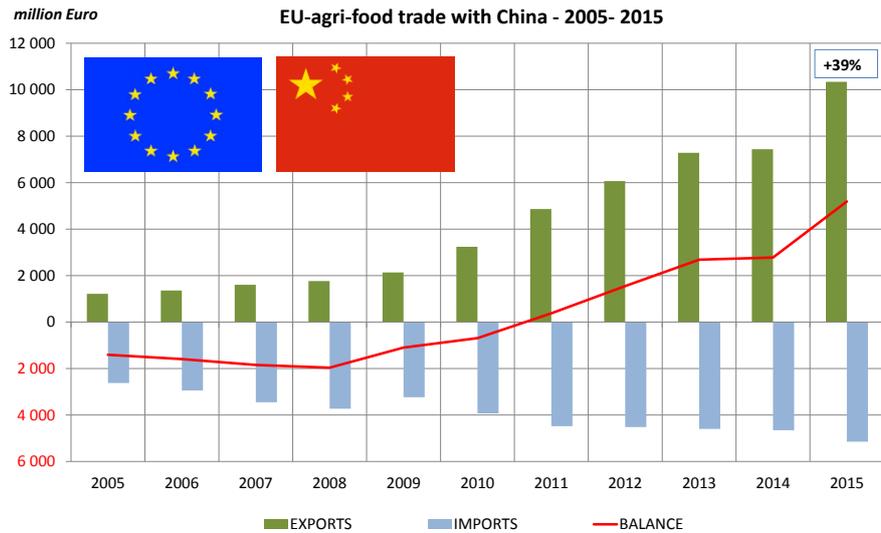


## Agri-food trade in 2015: China boosts EU exports



Export continues to be one of the key drivers of growth and jobs in European agriculture and food industry. Over the last decade, the reforms of the Common Agricultural Policy have incentivised the EU agri-food sector to improve its orientation to market signals and thus become more competitive. During this period, the EU agri-food sector has also benefitted from the expansion of global value chains. As a result, agri-food export values have doubled and the EU has secured the position of a competitive supplier at all levels of the agricultural value chain. Among the agricultural feed and food products, the EU exports feature in particular wines, cereals, meat, olive oil and dairy products, and one third of the export value is generated by beverages and products of the food industry such as pasta, infant food and other processed products. Agri-food represents more than 7 % of all goods exported from the EU.

Although some Member States and sectors still suffered from the import restrictions imposed by the Russian Federation and from low world market prices, the overall EU agricultural trade performance was positive in 2015, with the value of agri-food exports increasing to €129 billion and the net trade surplus at €16 billion. Diversification of exports has been the key word of EU agri-food trade policy in the aftermath of the Russian embargo, enabling the EU to maintain the high level of exports and consequently its position as the world's No.1 exporter. Besides finding new markets, ties with existing partners have been strengthened, as around half of the total gain in EU agri-food exports in 2015 came from increased trade with China.

Several sanitary and phyto-sanitary barriers lifted in 2015 and GI agreements concluded for EU quality products (e.g. Morocco) also increase export opportunities. Advances in free trade negotiations (deal concluded with Vietnam) and the WTO Nairobi Agreement, foreseeing discipline in export support, pave the road for a less distortive trade environment and could enhance further growth.

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## 1. International setting

The world economic growth in 2015 continued at the lower development path adopted in the aftermath of the global economic crisis. The crisis peaked in 2009 with the global GDP shrinking by 1.7 % and, in spite of the recovery in the following years; the growth levels remain lower than in the last decade.

The world economy in 2015 was characterised by weak aggregate demand, falling commodity prices and increasing financial market volatility in major economies. The world gross product growth is estimated at 2.4 % in 2015. This marks a drop from the 2014 level of 2.6 %.<sup>1</sup>

The growth in the global volume of trade in goods was below 3 % for the fifth consecutive year in 2015 (2.8 %). The value of global trade was even in decline due to the fall in commodity prices. In the last five years the trade growth followed the rate of global GDP growth whereas previously trade had grown twice as fast as the GDP.

The developed economies have been driving the increase in world trade in the last two years. In 2015, 70 % of the trade growth came from leading economies in Europe that witnessed increased import demand. Developing economies, notably in East Asia, contributed less than 9 %.

2015 was characterised by strong fluctuations in exchange rates. Depreciation of major currencies against the US dollar had an impact on export competitiveness and on import demand.

Global agricultural production was at high level in 2015 due to good harvests. This pushed the prices of basic agricultural commodities down. Coffee prices, however, were high following a drought in Brazil. Lower prices for importers and the relative increase in competitiveness of some exporters due to exchange rate developments supported the growth of agricultural trade.

On the world trade policy arena, the move towards openness continues. The Doha Development Agenda (DDA) took an important step during the WTO Nairobi ministerial in December 2015 leading to a multilateral agreement on disciplines of export support measures.

<sup>1</sup> World economic situation and prospects 2016, United Nations report.

Multi-nation regional trade deals are also advancing. In the Asian Pacific area, the Trans-Pacific Partnership<sup>2</sup> (TPP) and the China-Australia Free Trade Agreement were concluded in 2015. Other ongoing regional negotiations in the area include the Free Trade Area of Asia Pacific<sup>3</sup> (FTAAP) and the Regional Comprehensive Economic Partnership<sup>4</sup> (RCEP).

The EU is running multiple bilateral trade negotiations, including the Transatlantic Trade and Investment Partnership (TTIP) with the US. In 2015, the negotiations of a trade agreement between the EU and Vietnam were concluded. Progress was made also on other negotiations, for example with Japan, and new negotiations were launched with the Philippines. The Commission Communication "Trade for all – towards a more responsible trade and investment policy", published in October 2015, announced that the Commission will request the authorisation to negotiate FTAs with Australia and New Zealand.

## 2. World trade in agri-food

The ranking of the top world agri-food exporters remained unchanged in 2015, after the EU28 took over the leading position from the US in 2013. EU28 exports reached €129 billion, with an annual increase of 5.7 %. The US remained an equally strong exporter, selling just about €1 billion less than the EU to world markets<sup>5</sup>. The gap to the third strongest exporter in agri-food is much wider, with Brazil shipping out approximately half of the value of EU28 exports.

All top exporters expanded their exports in value and hence contributed to the growth in global agri-food trade. China was able to increase its supply to world markets by 21 %. The low crop commodity prices that had a negative impact on the export values of the Latin American countries in 2014, was counterbalanced by

<sup>2</sup> Trade agreement under negotiation between the US, Japan, Canada, Mexico, Australia, New Zealand, Singapore, Vietnam, Malaysia, Peru, Chile and Brunei (excluding China).

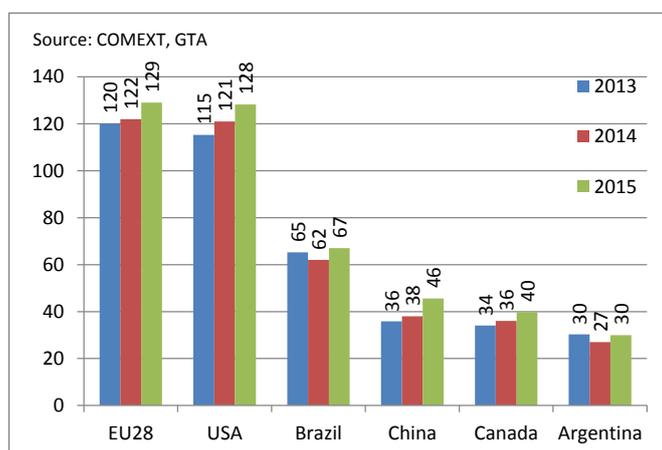
<sup>3</sup> Envisaged trade agreement among the APEC countries (Australia, Brunei, Canada, Indonesia, Japan, South Korea, Malaysia, New Zealand, Philippines, Singapore, Thailand, US, Taiwan, Hong Kong, China, Mexico, Papua New Guinea, Chile, Peru, Russia and Vietnam).

<sup>4</sup> ASEAN plus Australia, China, India, Japan, South Korea and New Zealand.

<sup>5</sup> The definition of agri-food products in US export statistics is different from the definition used for this publication (GTA).

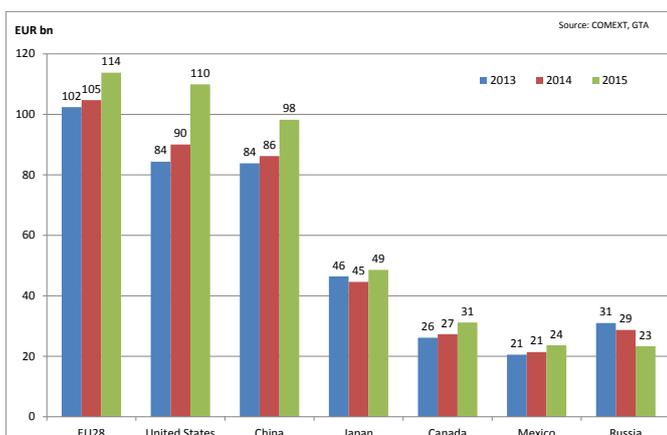
higher coffee prices and increased volumes of commodity exports in 2015, leading to increased exports of Brazil and Argentina in value terms.

**Graph 1: Top world agri-food exporters**



The EU28 also maintained the lead amongst agri-food importers with a value of imports of €114 billion. It is followed by the US and China, with €110 billion and €98 billion respectively. All top import countries with the exception of Russia, recorded an increase in imports for 2015 compared to the previous year, ranging between 8.5% (EU28) and 22% (US). The value of Russia's imports was down by about one fifth and Russia was overtaken by Mexico in the ranking of top importers.

**Graph 2: Top world agri-food importers**



The profile of the main players among world agri-food traders varies: the EU28, US, China and Canada have a strong domestic production of agri-food but are at the same time among top exporters and importers. Brazil and Argentina are primarily suppliers, whereas Japan and Russia are net purchasers on world agricultural

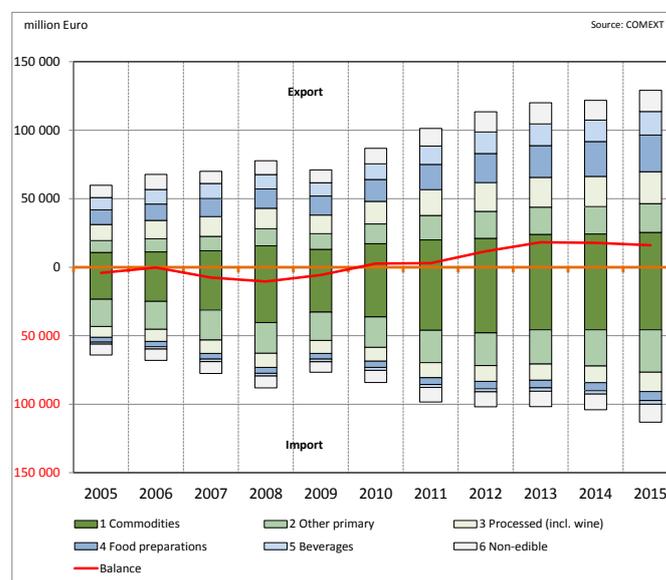
markets. Mexico is an equally strong exporter and importer with the trade balance virtually around zero.

### 3. EU performance in agri-food trade

The output of the EU agricultural sector was valued at €410 billion in 2015<sup>6</sup>. Agriculture and the food related industries and services together provide almost 44 million jobs in the EU. The food production and processing chain accounts for 7.5% of employment and 3.7% of total value added in the EU. Exports of agri-food products provide income and are a driver for jobs and growth for the European agri-food sector.

With the exception of 2009, EU28 agri-food exports and imports expanded continuously during the last decade. The annual growth rate, which had previously slowed down from 12% in 2012 to 1.6% in 2014, was on the rise again in 2015 with 5.7%. Import growth rates developed from 13% in 2012 to 0% in 2013 and rose again to 8.5% in 2015.

**Graph 3: Structure of EU28 agri-food trade 2005-2015**



The EU exports a wide range of products from all parts of the value chain which demonstrates the versatility of the EU agri-food sector. About half of the exports are agricultural food and feed products (commodities, other primary and processed agricultural products) as seen on graph 3. Around one third is accounted for by

<sup>6</sup> Source: Eurostat.

food preparations and beverages, whereas non-edible agricultural products contribute the remaining sixth.

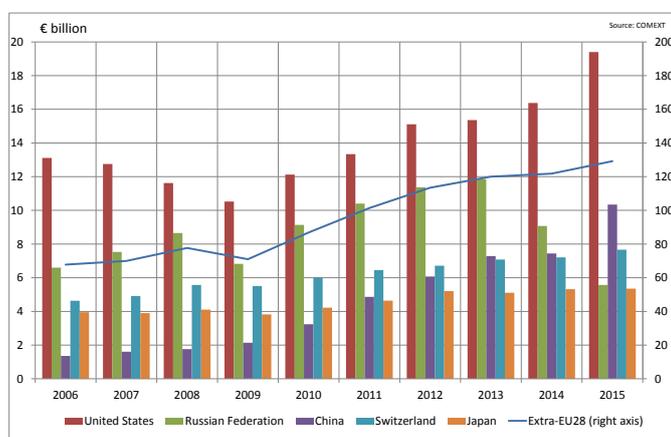
EU imports, on the other hand, are more dominated by agricultural food and feed products, which represent about 80 % of all imports, while food preparations and beverages account for 8 %, and non-edible products make up 11 %.

During the last decade, the overall EU28 agri-food trade pattern did not change substantially in relative terms, although both imports and exports have more than doubled since 2005. In addition, due to higher growth in exports, the EU turned to be a net exporter as from 2010.

Currently, the top five destinations for EU28 agri-food exports are the US, China, Switzerland, Russia and Japan. The US by far is the most significant partner, absorbing 15 % of total exports and growing. In 2015, sales to the US grew by another 19 % but the quickest growth was registered for China (+39 %).

China has risen from the fifth place in 2010 to the second most important export destination for the EU. While in 2014 the growth seemed to stabilise (+2 %), another hike could be observed in 2015 when the value of exports grew by more than €3 billion to reach €10 billion. Considering that Hong Kong to a large extent functions as a transit hub for China, adding the EU exports towards Hong Kong would magnify the Chinese export market to almost €15 billion. In this perspective, China would further consolidate its position behind the top destination – USA (€19 billion).

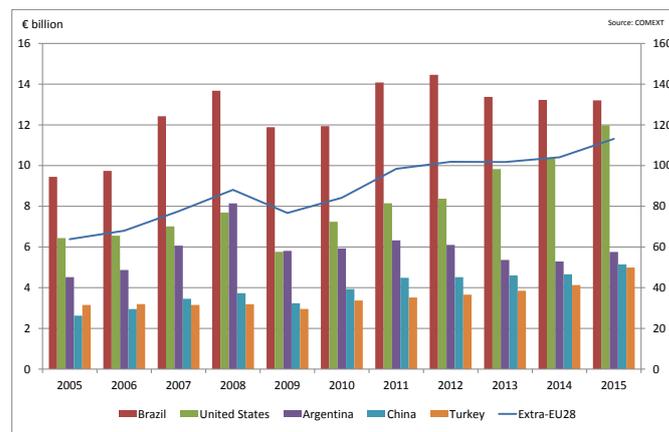
**Graph 4: EU28 agri-food exports by destination**



Russia dropped from the second to the fourth place (-39 %) in EU exports. This was due to the import embargo for some EU products but also the worsening economic situation in Russia, which had an impact on the sales of processed products and beverages not subject to the ban.

The EU continues to mainly source its agri-food imports from Brazil, the US, Argentina, China and Turkey. With the trend of the recent years, i.e. decreasing imports from South America and growing imports from the US (+16 % in 2015), Brazil and the US have become nearly equally important EU suppliers in value terms (accounting for 12 % and 11 % respectively of total EU28 imports). Among all origins for which the EU imports are above €1 billion, the highest increase in 2015 was registered for Turkey (+21 %) and Vietnam (+20 %).

**Graph 5: EU28 agri-food imports by origin**

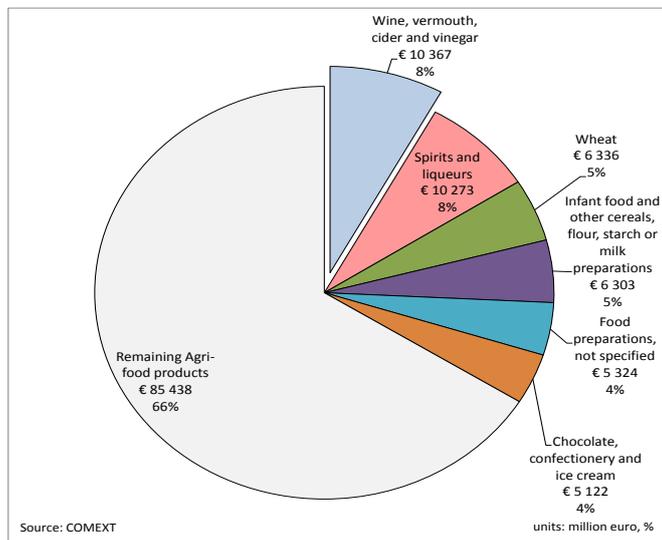


### 3.1. EU agri-food exports

The more detailed structure of agri-food trade reveals that the EU export portfolio includes products at various quality and value-added levels, with similar shares in the total.

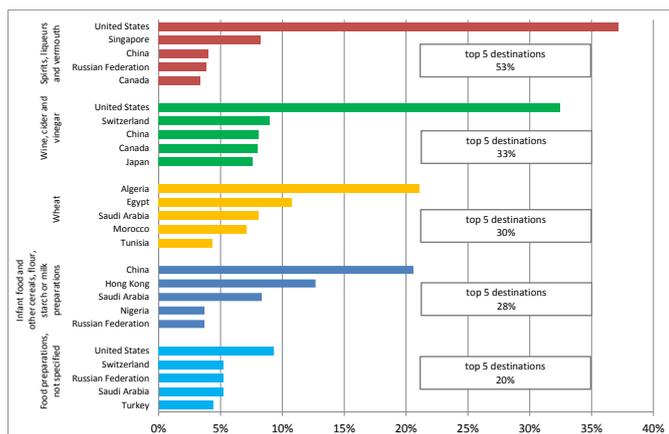
Wine and spirits dominate the basket of exported products, each of them representing 8 % of total EU28 agri-food exports. In 2015, wheat is still an important good, ranking third. It is followed by infant food, various food preparations and chocolate.

**Graph 6: Composition of EU agri-food exports in 2015**



Compared to the previous year, there were no major changes in the top export product categories – only 'chocolate and confectionery' took the place formerly occupied by milk powders. Low market prices contributed to the reduced export value for milk powders, and the price drop could not be offset by the increased export volume.

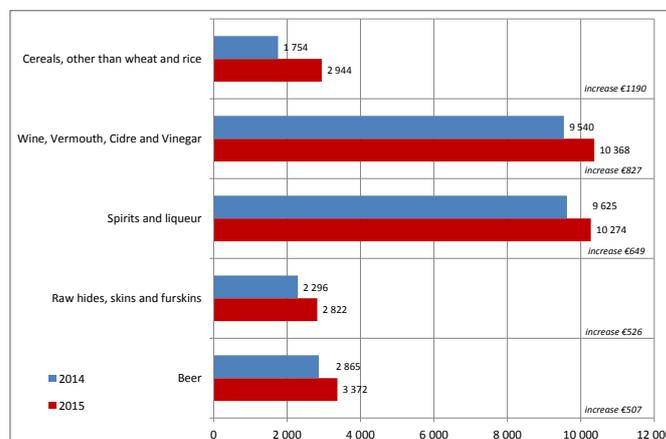
**Graph 7: Distribution of exports in main product categories by top destinations**



For each of the five top export categories, graph 7 depicts the most important export destinations. Wines and spirits exports are increasingly concentrated towards the US. The consumers in the US buy 32 % (up from 30 % in 2014) of all European wines exported and 37 % of spirits (34 % in 2014) sold to third countries.

The top five destinations concentrate between 20 % and 53 % of total exports in the main product categories. Considering Hong Kong as an entry point to the Chinese market and adding up both shares in EU exports, China would rank second for wines (15 %) and the top 5 destinations would make up 40 % of EU wine exports. For food preparations, China would also rank second, and in the case of infant food, China and Hong Kong together would represent the dominant sales market with a 33 % share of the total.

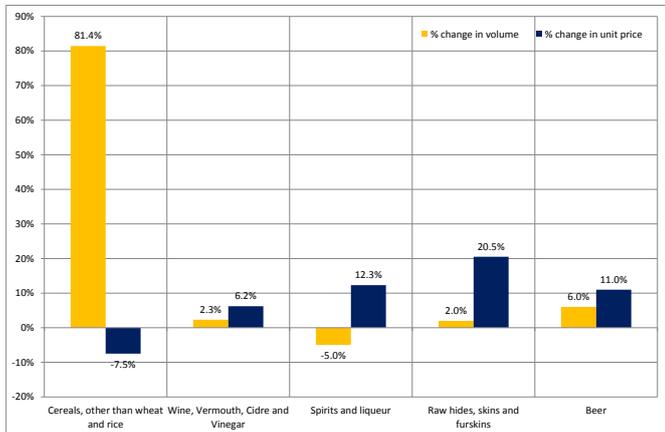
**Graph 8: Product categories with the largest absolute annual export value increase 2015, € mio**



In 2015, the largest export gains were achieved for products which already represent a high share in agri-food exports, such as spirits and wine. The combined increase in export value for these two product categories reached €1.5 billion. However, the record gain for a single product category was registered for cereals other than wheat and rice with +€1.2 billion (+68 %). Raw hides, beer and live animals contributed to the increase by about €0.5 billion each. The product categories with the highest annual increase in export values are shown in graph 8.

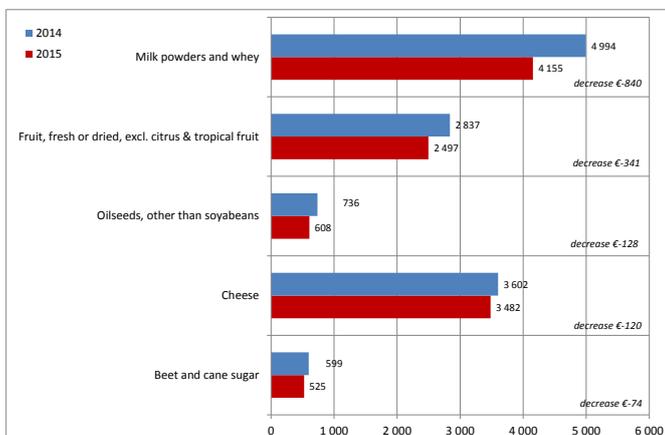
The export increases (among the top five) were driven by higher prices except for cereals other than wheat and rice. This reflects mainly increased barley exports to several destinations, notably to China and Saudi Arabia.

**Graph 9: Annual percentage change in volume and unit price for the product categories with the largest EU total export increases in 2015<sup>7</sup>**



On the other hand, the greatest export value losses in 2015 were registered for products in the group 'agricultural food and feed products' featuring in particular milk powders, fresh fruit, oilseeds, cheese and sugar.

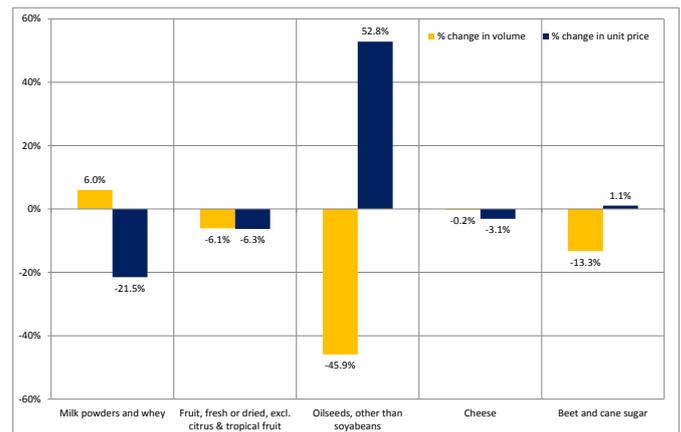
**Graph 10: Product categories with the largest absolute annual export value decrease 2015, € mio**



The highest export value decrease was recorded for milk powders, where the value of exports remained €840 million lower (-17 %) than in 2014. Fresh fruit exports also dropped significantly by €341 million (-12 %). Dairy products and fruit and vegetables were the sectors most severely hit by the Russian import restrictions but for dairy products, the lower export

value was caused by lower prices as the export quantity in 2015 even increased (graph 11).

**Graph 11: Annual percentage change in volume and unit price for the product categories with the largest EU total export decreases in 2015**

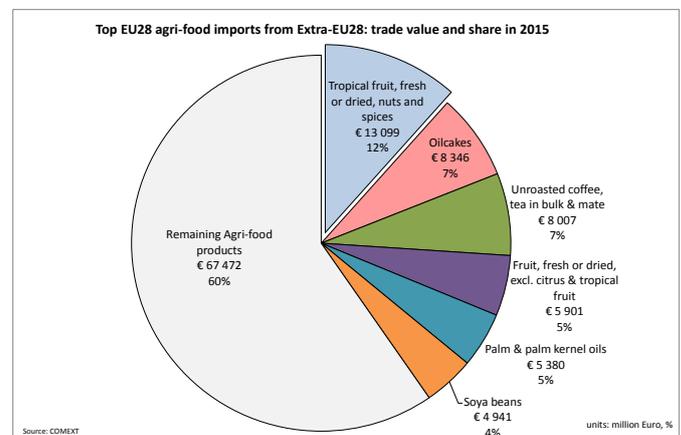


Fruit exports suffered from both lower prices and smaller volumes exported struggling to find new markets. In the case of oilseeds, the prices were much higher, but the quantity of exports decreased.

### 3.2. EU agri-food imports

Graph 12 shows the composition of EU agri-food imports by product category. In essence, the EU is sourcing three main types of products from third countries: 'fruit, nuts, and spices'; 'vegetable proteins and fats'; and coffee.

**Graph 12: Composition of EU agri-food imports in 2015**

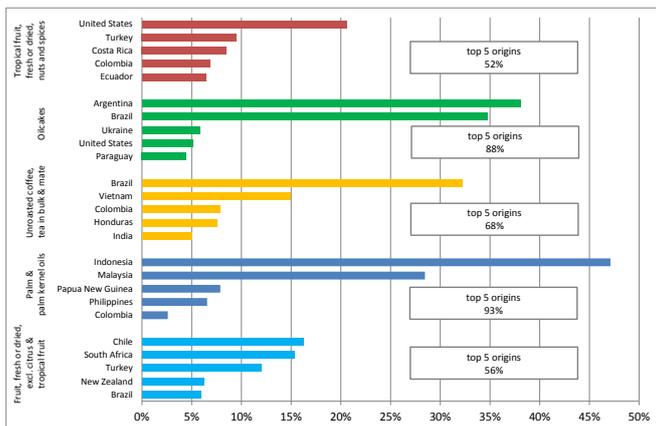


<sup>7</sup> Unit prices here and in the rest of the document are calculated by division of traded value with traded volume of the product categories. The result may include effects of proportional changes between higher and lower valued items within the product category aggregate.

Compared to the previous year, the top six import categories did not change in 2015, only fresh fruit and palm oil swapped their ranking positions (4<sup>th</sup> and 5<sup>th</sup>) as palm oil imports were down by 21 %.

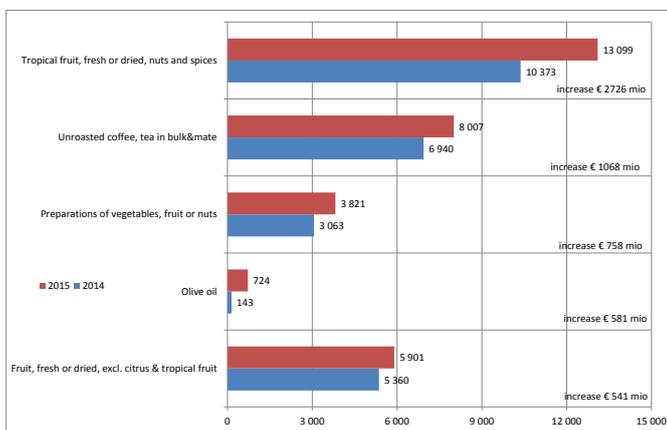
The geographical concentration of EU agri-food imports is more significant than for exports as graph 13 reveals. Palm oil supply is nearly all (93 %) provided by five countries, with Indonesia alone shipping half of EU's demand. Oilcake supply is also very highly concentrated in the Americas, where Argentina and Brazil cover 75 %.

**Graph 13: Distribution of imports in main product categories by top origins**



Despite ranking 4<sup>th</sup> overall among the EU import partners, China is missing from this picture. This reflects the fact that other suppliers are more specialised and that China supplies products not figuring in the top of agri-food EU imports.

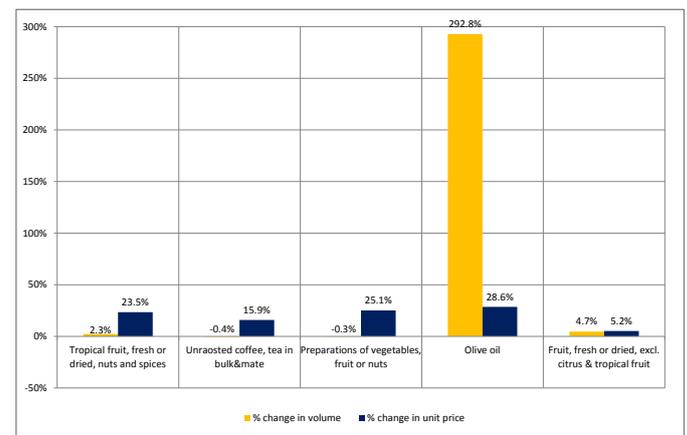
**Graph 14: Product categories with the largest absolute annual import value increase 2015**



EU import values in 2015 augmented in particular for tropical fruit, nuts and spices. Additional imports, worth €2.7 billion, represented an increase of 25 % in the import value of fruit and nuts. Purchases of unroasted coffee were also more than €1 billion higher than the year before.

Graph 15 reveals that the driver behind increased imports of olive oil was the surge in import volumes which was related to the exceptional circumstances in the olive oil market in 2015. EU production was very low (-42 % on previous year), and with few stocks, the high level production in Tunisia enabled to complete the market needs with imports. Production in the EU should recover in the 2015/2016 marketing year and thus imports should normalise.

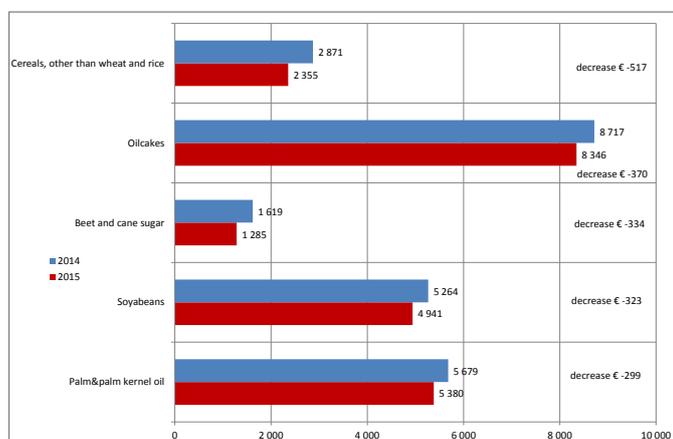
**Graph 15: Annual percentage change in volume and unit price for selected product categories with EU total import increases in 2015**



Imports by volume of tropical fruit, coffee and vegetable preparations, which were also among products with top import value increases, actually stayed stable but with significantly higher prices, these imports were more expensive.

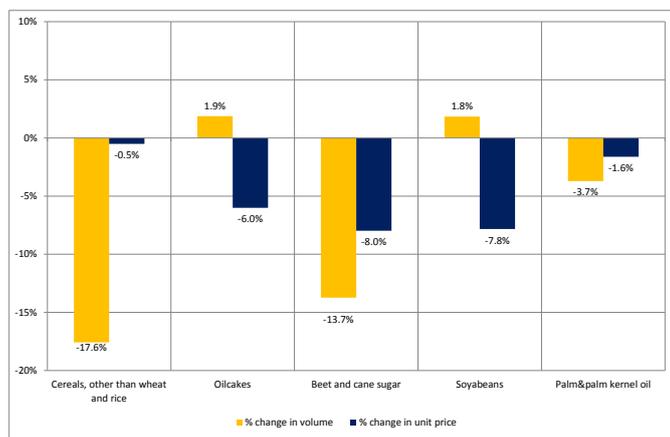
European imports decreased the strongest in cereals (other than wheat and rice), oilseeds, sugar, soya beans and palm oil.

**Graph 16: Product categories with the largest absolute annual import value decrease 2015**



For cereals and palm oil, reduced total import value was caused by lower volumes imported. Sugar imports had decreased both due to lower prices and fewer quantities while oilcakes and soya beans imports increased in volume but favourable prices were behind the lower total import value.

**Graph 17: Annual percentage change in volume and unit price for the product categories with the largest EU total import decreases in 2015**



## 4. Agri-food trade with key partners

This chapter provides a general overview of the trade performance of the EU's key partners and a detailed description of their trade flows with the EU: The United States and China are the partners depicting the strongest reciprocal trade relationship with the EU. Agri-food trade with Brazil and Japan is more of a one-way flow. Brazil is the most important origin for EU

agri-food imports, while Japan is a major export destination for the EU. In addition, trade development with Russia is analysed, following drastic changes after the embargo for certain agricultural products was enforced in August 2014. Finally, given that the trade policy of the EU incentivises trade with Least Developed Countries, this group of countries is also covered in the analysis.

### 4.1. United States

*Big gains in US exports of nuts, sorghum and food preparations, but losses for soya beans and maize*

US ranks second in world exports and imports of agri-food. Its agri-food trade balance was positive with €18 billion in 2015. The value of US agri-food exports rose to €128 billion (+6 % compared to 2014)<sup>8</sup>. Due to the stronger dollar, the US products were more expensive.

Canada remains the top US agri-food export destination (17 %) but China has come very close (almost 17 %). They are followed by Mexico (13 %). The EU's share has slightly increased to 9.4 %, leaving Japan fifth at 8.2 %.

The wide range of export products of the US features animal feed (soya beans and oilcakes), field crops (maize, wheat, and cotton), nuts, meat and ethanol. Imports are dominated by beverages, coffee, fruit and vegetables, meat, prepared foods and also ethanol.

The overall increase in US export values in 2015 was mostly driven by higher returns from fruit and nuts (+21 %), food preparations (+15 %) and grain sorghum (+60 %) exports, all of which were priced considerably higher in 2015. The biggest market for fruit and nuts is the EU, which in 2015 took less US product but at a higher price than in 2014. Grain sorghum was traded at high prices in 2015, and since the harvest was good, both, the export value and the volumes rose. Increases were most significant to China (+71 %), Mexico (+52 %) and some African destinations (Kenya in particular, where export values more than doubled).

Soya beans, the top USA agri-food export product, faced low prices. Exports to China, the main market,

<sup>8</sup> According to the definition of agricultural products used for this newsletter. Source Global Trade Atlas.

were reduced by 16 %. Another top product, maize, was exported more to Mexico (+23 %) but other destinations recorded significant reductions (South Korea, Japan etc.). Thus, the overall change in trade value was negative in 2015 (-6 %).

Wheat exports continued to decrease for the second consecutive year. Exports to Brazil, two years ago still the No 1 destination for US wheat (after an export surge in 2012-2013) dropped by another 80 % from the already low level of 2014. Brazil's total imports of wheat have decreased and the remainder is mainly sourced from Argentina. After a drastic decline of US wheat exports to China in 2014 following the development of China's own production and diversification of the wheat import basket, Chinese imports from the US seem to have stabilised at a lower level. After the described shifts, Japan has become the top destination for US wheat.

US meat exports overall were relatively stable, but with changes taking place by category. While beef and pork exports stagnated, poultry exports registered a significant drop (-16 %). By contrast, meat offal and preparations' exports increased by 13 %.

US agri-food imports were characterised by increased values of all main products by more than 20 %, most significantly beef and soft drinks imports were up 40 % but also wine, beer, coffee, fruit and vegetables recorded notable increases. Prime suppliers of the US with agri food are the EU (21%) and its NAFTA partners Canada and Mexico (both 18%).

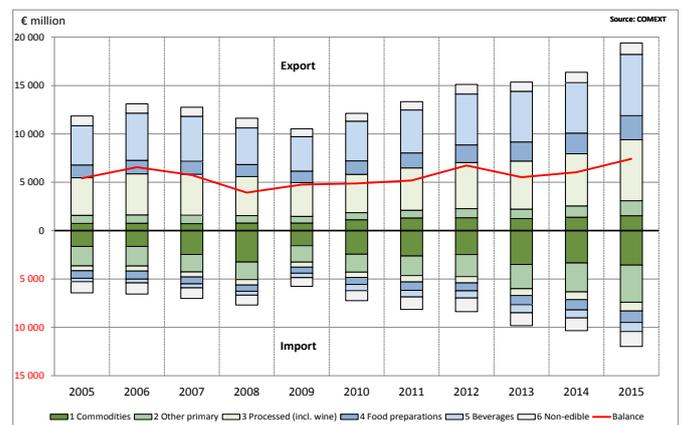
### US - agri-food trade with the EU

The United States is the top export market for the EU and the second most important origin for EU imports in agri-food products. In value terms, 15 % of EU exports (€19 billion) are directed towards the US, and 11 % of all EU imports (€12 billion) are sourced from there. After continuous but rather slow growth in the preceding years, trade flows between the EU and the US expanded significantly in 2015. The depreciation of the euro against the US dollar (+17 %) contributed to the increase of EU exports (+19 %), however, EU imports from the US as well continued to increase (+16 %).

Although the US was not the fastest growing external market among the top five trade partners of the EU, the increase was significant given the very high level of trade. This means a further strengthening of the link between the two agricultural markets.

Due to the stronger increase of exports compared to imports in absolute terms, the trade balance increased in favour of the EU and to reach a surplus of €7.4 billion. Traditionally, the EU exports to the US are divided almost equally between products directly from the farming sector (including wine) with 49 %, and of the food and drink industry (45 %).

**Graph 18: Structure of EU28 agri-food trade with the US 2005-2015**

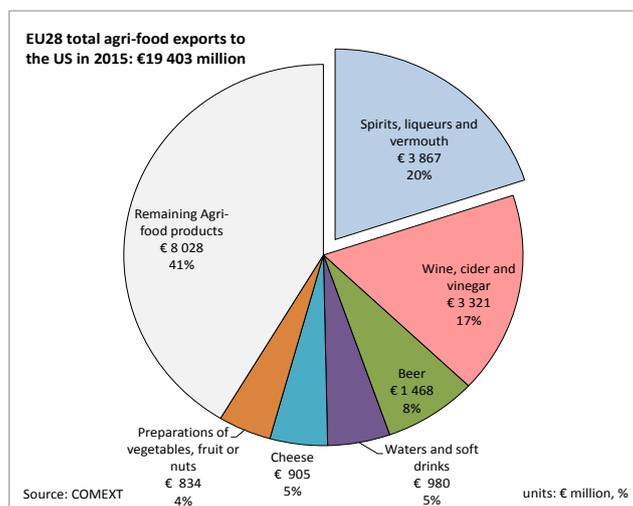


EU imports from the US, by contrast, are dominated by agricultural feed and food products (commodities and other primary products) which account for 70 %.

By product category, half of the exports to the US are beverages: spirits, wine, beer and soft drinks. Cheese, fruit and vegetable preparations, pasta and olive oil also contribute between 4 % and 5 % each.

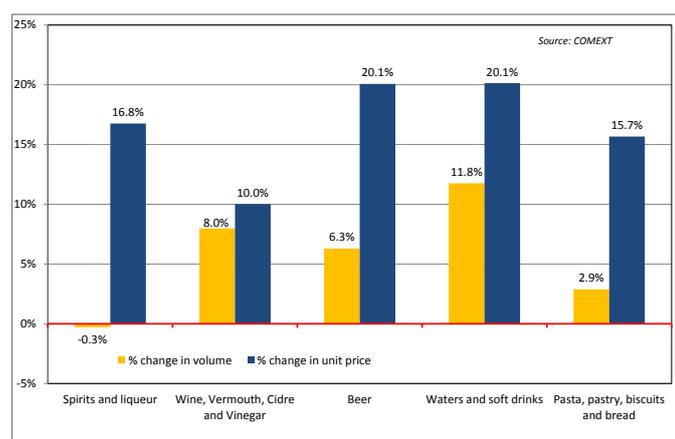
Compared to the export structure of 2014, the situation in 2015 changed only marginally. Due to lower cheese prices and the increased value of soft drink exports, the two categories swapped places in the ranking. Also olive oil dropped lower due to fewer exports by the EU, while exports of fruit and vegetable preparations increased.

**Graph 19: Composition of EU agri-food exports to the US in 2015**



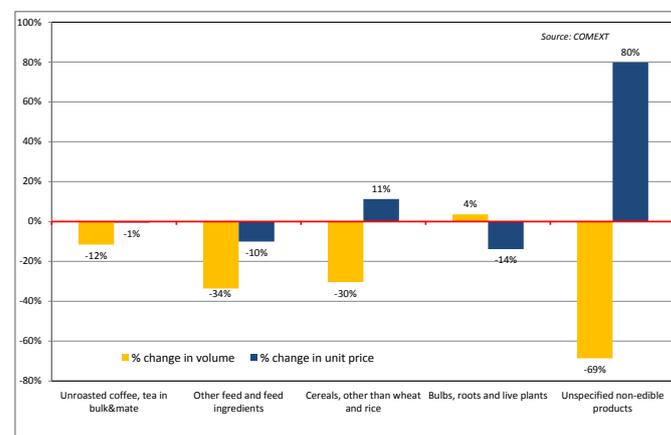
The largest increase in absolute values in EU exports to the US was in spirits (increase from €3.3 billion in 2014 to €3.9 billion in 2015; +16 %). In descending order, the increases in export values for wine, beer, soft drinks and pasta and pastry followed. All these export value increases were largely due to higher prices, although the shipments of soft drinks, wine and beer also increased in volume.

**Graph 20: Annual percentage change in volume and unit price for the product categories with the largest export increases to the US in 2015**



Losses in export values - negligible compared to gains at €150 million - were most notable for unroasted coffee, other feed, cereals (except wheat and rice), roots and live plants and unspecified edible products. In all cases, except for roots and live plants, export values remained lower due reduced export quantities.

**Graph 21: Annual percentage change in volume and unit price for the product categories with the largest export decreases to the US in 2015**



The US is a particularly important market for EU exports in coffee (re-exports), beer, olive oil, essential oils and spirits. As table 1 indicates, the US represents a crucial destination for these product categories, absorbing major (and increasing, except for coffee) shares of total EU exports in these products.

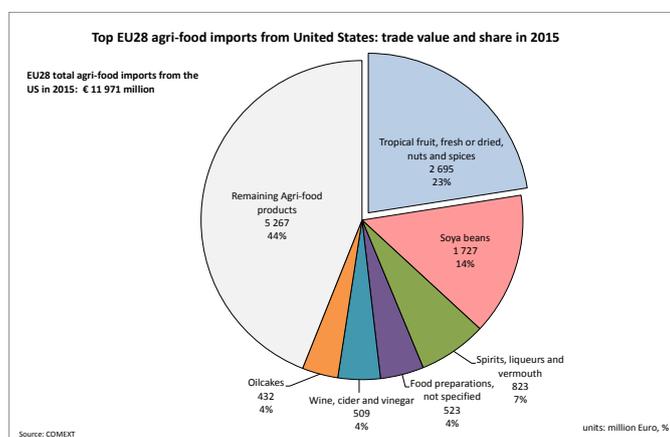
**Table 1: US as important destination for EU exports by product category, in 2015**

Rank	product category	EU export to world	EU export to the US	US share in total
in EUR million				
1	Unroasted coffee, tea in bulk & mate	503	265	53%
2	Beer	3,371	1,468	44%
3	Olive oil	2,257	800	35%
4	Essential oils	572	215	38%
5	Spirits, liqueurs and vermouth	10,402	3,867	37%

Concerning EU imports from the US, tropical fruit and nuts (21 %) and soya beans (14 %) dominate, with spirits (7 %), wine (4 %) and food preparations (4 %) completing the top five.

The ranking of most important product categories in 2015 remained unchanged compared to 2014, while changes were noted in import values and thus in the respective shares. Notably, tropical fruits and nuts increased its importance from 19 % to 22 % while the share of soya beans was down from 16 % to 14 %.

**Graph 22: Composition of EU agri-food imports from the US in 2015**



The US share in EU imports is particularly high for live animals and spirits. However, imports of these products are relatively limited. The US is also an important source for soya beans and tropical fruit and nuts where the EU relies on imports to complete the supply.

**Table 2: US as important origin for EU imports by product category, in 2015**

Rank	product category	EU imports from world	EU imports from the US	US share in total
in EUR million				
1	Live animals	277	148	53 %
2	Spirits, liqueurs and vermouth	1,524	823	54 %
3	Soya beans	4,981	1,727	35 %
4	Pet food	1,016	307	30 %
5	Tropical fruit and nuts	13,091	2,695	21 %

## 4.2. China

### Revitalisation of both demand and supply

In 2015, China's demand for agri-food imports continued to increase at a higher speed again after a slowdown the year before. Even though China's agri-food exports (+20 %) rose even quicker than imports (+14 %), the agri-food trade deficit stretched wider to beyond €52 billion.

The share of US in China's agri-food imports, the first supplier of agri-food products, shrank from 24 % to 22 % in favour of the EU (from 9 % to 12 %) that ranks third. Brazil's share was stable at 18 %. While the value

of exports of the other top suppliers also increased, Chinese imports from the EU rose by 45 % due to increased demand for pork and infant food.

In the supply of the US to China, soya beans have a dominant role (53 %) but because of lower prices, the US exported lower volumes of soya beans to China in 2015 and instead, doubled its exports of grain sorghum. China sourced more soya beans from Brazil whose exports to China consist to 85 % of soya beans.

In total, over one third of Chinese agri-food imports are soya beans, with a rising import value but shrinking share in total imports. By contrast, grain sorghum and barley imports more than doubled by value in 2015. Meat imports (in particular of fresh or frozen beef and pork) were also twice as high as the year before.

Conversely, the formerly number two import product, cotton (not carded or combed), saw a further drop of 38 % in import value compared to 2014. The value of milk powders imports more than halved as the import quantity was 40 % less and prices 30 % lower.

On the export side, fresh and processed fruit and vegetables continue to be the flagship export products for China's agri-food sector with a share of 43 % in total exports. In 2015, it was also in these product categories where the biggest absolute gains in export value were registered; in relative terms, the gain was around 30 %. The main market for Chinese agri-food exports is Hong Kong (15 %) with soft drinks, live pigs (and meats) and various food preparations figuring as main products. The relatively stable exports to Japan have resulted in Japan's share to shrink to 13 % while other Asia has gained importance. The EU (12 %) and USA (8 %) have maintained their share in China's exports.

### China – agri-food trade with the EU

With total agri-food exports in value of EUR 10.3 billion and imports in value of EUR 5.1 billion, China is the second most important destination (8 % of all EU agri-exports) and the fourth most important origin (4.5 %) for EU agri-food trade. In the course of 2015 the euro/Chinese yuan exchange rate was favourable for EU exports.

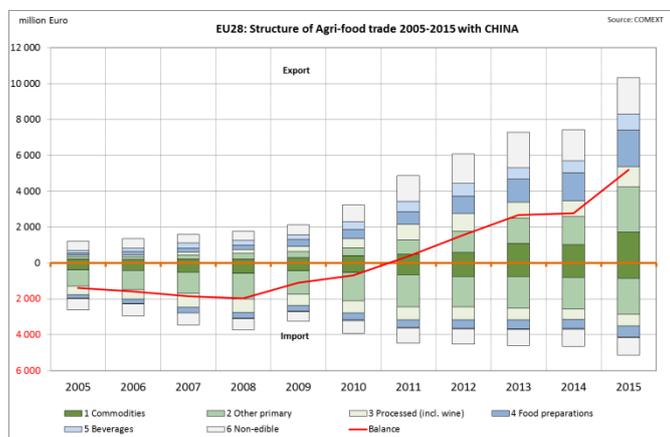
The EU being a net exporter of agri-food products to China since 2011, the trade balance is increasingly in favour of the EU amounting to EUR 5.2 billion in 2015,

when exports increased again considerably after a standstill in 2014.

The trade balance shows that higher exports in 2015 were due to increases in all product groups. The most pronounced growth could be observed with commodities, where exports increased by 71 % (from EUR 1.01 billion in 2014 to EUR 1.72 billion in 2015) driven by barley exports.

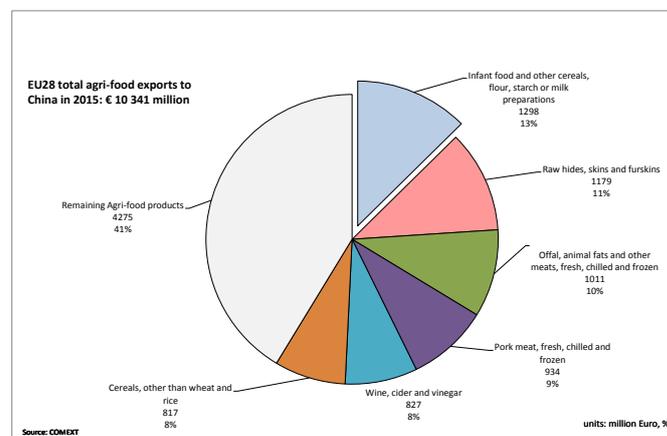
On the import side the changes since 2014 were less significant. Traditionally other primary products cover the main share of imports with 39 %, followed by non-edible products (19 %) and commodities ranging at 17 %. However, year-on-year, the most notable changes took place in the less important categories with imports of processed products increasing 19 % and food preparations by 15 %.

**Graph 23: Structure of EU28 agri-food trade with China 2005-2015**



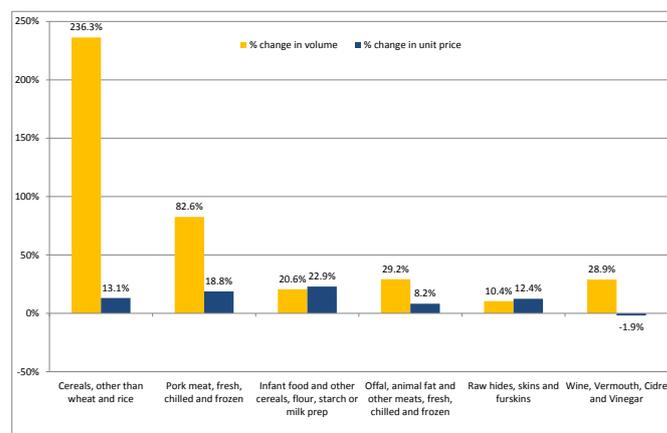
Concerning the more disaggregated product categories, the top six categories accumulate 59 % of total EU agri-exports towards China. This reflects the fact that China is mainly demanding a selected range of products from the EU. The top product category in 2015 was infant food and other cereals or milk preparations (13%), followed by hides and skins (11%). Offal and other meats (10 %) and pork meat (9 %) demonstrate the importance of pig meat in EU exports to China as the offal category is mainly comprised of products originating from pigs. Wine and cereals other than wheat and rice (both 8 %) complete the top-six.

**Graph 24: Composition of EU agri-food exports to China in 2015**



Compared to the high end trade pattern of 2014 the picture has somewhat changed. Infant food and preparations gained the first place from hides and skins. Though the exports of hides and skins increased (+24 %), the growth in infant food was faster (+48 %). Also, pig meat rose from the sixth place as exports more than doubled (from EUR 432 million to 934 million). The EU exporters were able to benefit from the restructuring of the Chinese pigmeat sector, completing the demand shortage created by many small farms going out of business.

**Graph 25: Annual percentage change in volume and unit price for the product categories with the largest export increases to China in 2015**

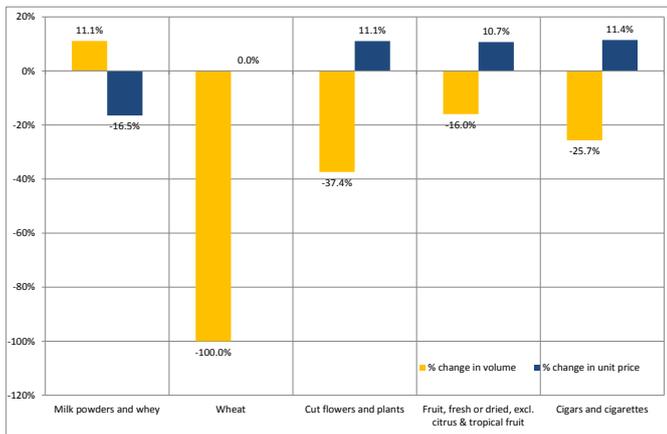


Due to lower prices for dairy products milk powders dropped out of the top and were replaced by cereals.

For most of the products with top gains, the export volumes had fuelled the higher values, only infant food registered higher increase in export price than in export volume as seen on graph 25 below.

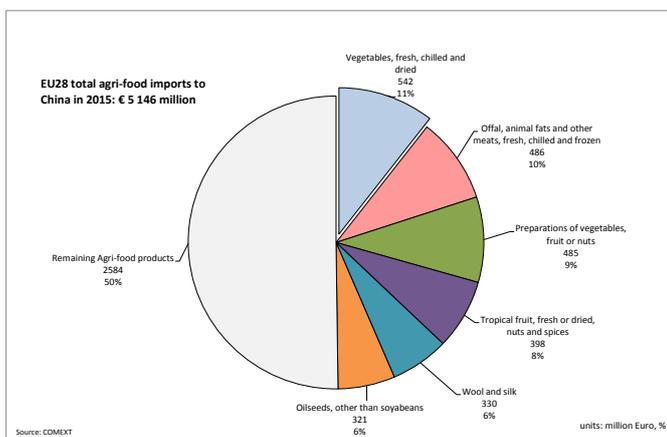
Although export losses to China were not comparable to the gains, it is interesting to see that also there, the losses were mainly driven by lower quantities exported with the exception of milk powders, which registered the biggest losses even though exports by volume increased.

**Graph 26: Annual percentage change in volume and unit price for the product categories with the largest export decreases to China in 2015**



In imports, the structure in 2014 and 2015 looks almost identical. Fresh and dried vegetables dominate with 11 %, followed by offal (10%), vegetable preparations (9 %), tropical fruit (8 %), silk and oilseeds (both 6 %).

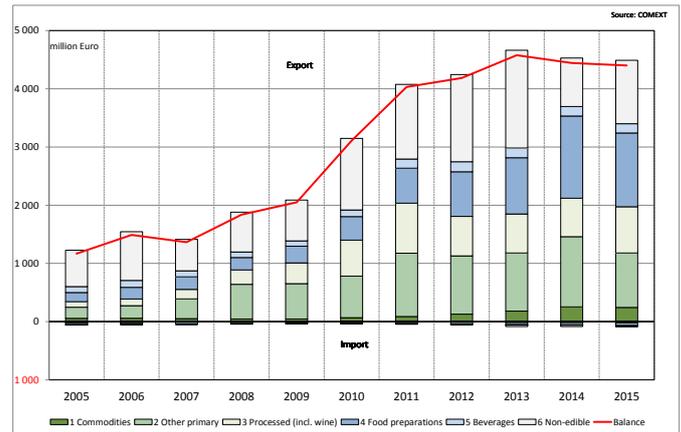
**Graph 27: Composition of EU agri-food imports from China in 2015**



### Hong Kong – agri-food trade with the EU

When analysing trade flows into China, it should be taken into account that Hong Kong to a large extent functions as a transit hub for the Chinese market.

**Graph 28: Structure of EU28 agri-food trade with Hong Kong 2005-2015**



With around 7 million citizens, Hong Kong ranks seventh among the top destinations for EU agri-food exports, importing products for a value of €4.5 billion. It has been a growing market for EU exports which a boom particularly between 2010 and 2013. In the past couple of years a stabilisation with a slight downwards trend is visible.

Largely, the basket of exported agri-food products to Hong Kong is similar to the one going to China, although the top categories of hides and skins, infant food and wine concentrate more export value (55 % of total exports). The start of extensive export growth in 2010 also coincides with the export developments towards China.

For several EU products China and Hong Kong taken together are the dominant export markets. Especially for non-edible products such as raw hides and skins, wool and silk EU exports depend on China and Hong Kong, as well as for offal and other meats. For these categories China and Hong Kong absorb more than half of the EU's exports. However, also one third of the total export value of infant food, a big export article for the EU, comes from China and Hong Kong.

**Table 3: China and Hong Kong as important destination for EU exports by product category, in 2015**

Rank	Product category	EU export to world	EU export to China & Hong Kong	China + Hong Kong share in total
in EUR million				
1	Raw hides, skins and fur skins	2,822	2,157	76 %
2	Wool and silk	174	108	62 %
3	Offal, animal fats and other meats, fresh, chilled and frozen	2,353	1,472	63 %
4	Cotton, flax and hemp, and plaiting materials	777	342	44 %
5	Infant food and other cereals, flour, starch or milk preparations	6,302	2,097	33 %

Despite being top providers of agri-food products to the EU overall, the share China and Hong Kong in imports of single products is less pronounced.

**Table 4: China and Hong Kong as important origin for EU imports by product category, in 2015**

Rank	Product category	EU imports from world	EU imports from China & Hong Kong	China + Hong Kong share in total
in EUR million				
1	Offal, animal fats and other meats, fresh, chilled and frozen	1,147	487	42 %
2	Wool and silk	824	333	40 %
3	Non-edible animal products	472	104	22 %
4	Eggs and honey	560	170	30 %
5	Miscellaneous seeds and hop cones	674	166	25 %

Only for meat offal and wool and silk China and Hong Kong provide more than one third of EU import demand. Interestingly, there is a strong reciprocal trade between the EU and China for both of these products.

### 4.3. Brazil

*Higher coffee prices and higher volumes of soya contributed to maintenance of export values*

After experiencing a low period in agri-food exports in previous years, Brazil's exports have seen a revival with increased export values to € 67 billion (+8.5 %) in 2015.

With lower imports than the year before, Brazil's large agricultural trade surplus stretches to nearly € 60 billion.

China's share in Brazil's agri-food exports increased in 2015 to exactly one quarter. The EU remains the second most important export partner, although with a declining share (from 21 % to 19 %). The US (5 %) and Russia (3 %) follow.

The rebound in export values is due to a mix of drivers. Lower prices for soya beans drove high global demand enabling Brazil to considerably increase the volume and thus the total value of soya beans exports by nearly €2 billion (11 %). Brazil's main export destination for soya is China, absorbing 75 % of all exports. Coffee price increase led the higher value of coffee exports. The main customer is the EU, accounting for over half of Brazil's coffee export value (52 % in 2015).

Maize exports, which had fallen substantially in 2014 due to lower prices and quantities picked up again (+50 %) to reach previous levels. Brazil's maize goes primarily to a number of countries in Asia and the Middle East.

The picture was mixed in meat exports. Contrary to the previous year, poultry exports increased 8 % with substantial export growth to China (+40 %) and South Korea (+60 %). The biggest clients in the Middle East also saw increased value of poultry meat from Brazil: an increase of 33 % was registered to Saudi Arabia, accounting for 20 % of Brazil's poultry exports. Meat preparations exports, which are equally divided into beef and poultry, increased 9 % due to higher prices for beef preparations driving the export value up. Finally, exports of unprocessed beef and pork showed a small decrease.

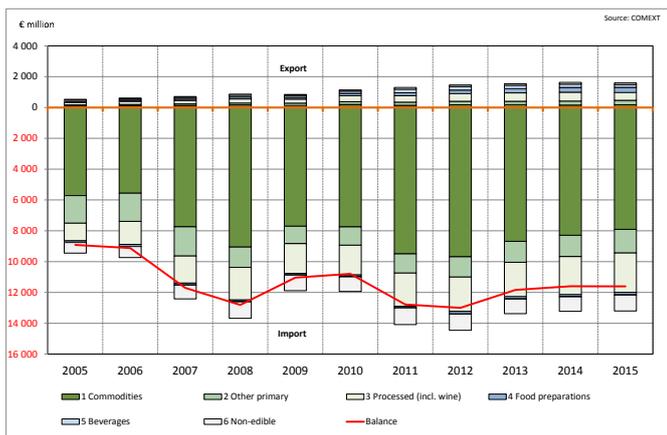
Overall, sugar exports of Brazil remained low due to low sugar prices, but China as the main destination showed a small increase. Exports to Bangladesh skyrocketed, to reach the same level of exports to China, whereby both countries now account for 10 % of Brazil's sugar exports.

The cross trade of ethanol between Brazil and the US, i.e. export of cane ethanol to the US and import of maize ethanol from the US, continued and further expanded in 2015.

### Brazil – agri-food trade with the EU

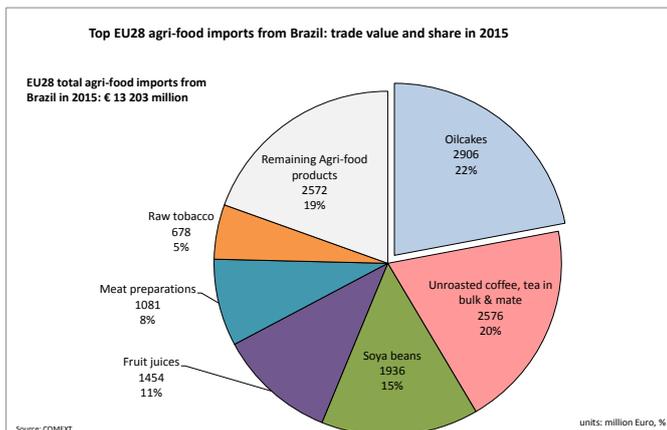
Brazil continues as the most important source for European imports of agri-food products (12 % of total in 2015), but its share is declining in favour of the USA. The EU-Brazil agri-food trade balance is favourable to Brazil and amounts to € 11.6 billion. 91 % of the products imported from Brazil are commodities, including in particular oil cakes and soya beans that provide protein and fat for animal feed, and coffee. The exports to Brazil, in contrast, represent 1.2 % of total EU agri-food exports. Brazil essentially buys European olive oil, preparations of vegetables, fruit and nuts, wine and food preparations.

**Graph 29: Structure of EU28 agri-food trade with Brazil 2005-2015**



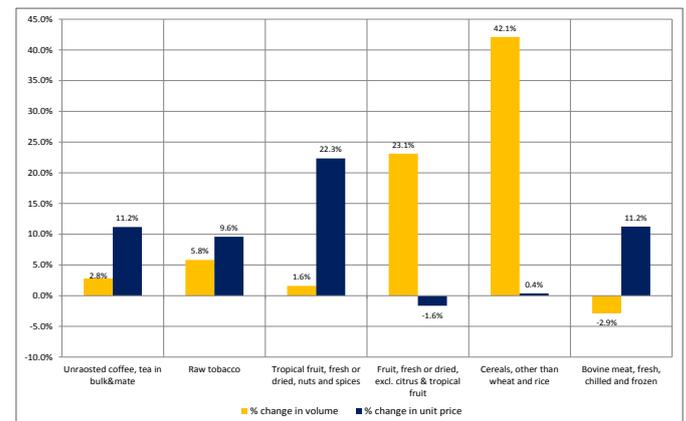
Against the global trend of agri-food trade expansion, EU imports from Brazil continued to decrease in 2015, but at a slower pace than the years before (-0.2 %), thanks to increased value of coffee imports.

**Graph 30: Composition of EU agri-food imports from Brazil in 2015**



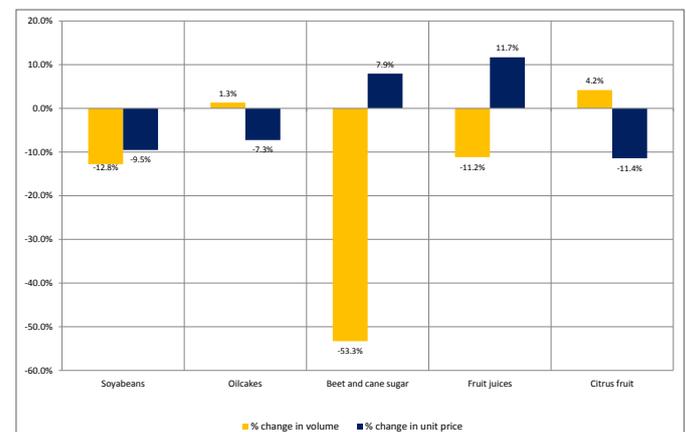
Out of the top five product categories which represent 76 % of all imports, around half of the import value is associated with feed products (oilcakes and soya beans), and the other half with food products (coffee, fruit juice and meat preparations).

**Graph 31: Annual percentage change in volume and unit price for the product categories with the largest import increases from Brazil in 2015**



The value of soya beans and oilcakes imports was substantially lower in 2015 (by € 700 million in total, -21 % and -6 % respectively). However, this was almost entirely offset by the increased value of coffee (+14 %), tobacco (+16 %), (+23 %), cereals (+43 %) and beef (+8 %) imports. Graph 31 above reveals that coffee, tobacco, tropical fruit and beef imports were up due to hikes in prices while the value of other fruit and cereals' imports rose due to substantially higher volumes.

**Graph 32: Annual percentage change in volume and unit price for selected product categories with import decreases from Brazil in 2015**



For soya beans, the import value decreased due to both lower prices and volumes. Also sugar and fruit juices were imported less by volume but for these products, the price was higher. The value of oilcakes and citrus fruit imports was down due to lower prices.

Table 5 lists the product categories for which Brazil is a particularly important origin for EU sourcing. Apart from the products already mentioned as top EU imports, Brazil also provides the EU with 55 % of its poultry meat imports.

**Table 5: Brazil as important origin for EU imports by product category, in 2015**

Rank	product category	EU imports from world	EU imports from Brazil	Brazilian share in total
in EUR mio				
1	Fruit juices	2,465	1,454	59 %
2	Poultry meat, fresh, chilled and frozen	334	183	55 %
3	Meat preparations	2,269	1,081	48 %
4	Soy beans	4,981	1,936	39 %
5	Oilcakes	8,375	2,906	35 %

## 4.4. Japan

### Imports turn to rise again after two low years

Japan is one of the most densely populated countries in the world with limited resources to fully cover its own demand for agricultural products with domestic production. While its imports of agri-food products had decreased in 2013-2014, they picked up again in 2015 to reach €49 billion. Given the modest level of exports, Japan's agri-food trade balance has a significant deficit (around €42 billion).

The US is the first supplier of agri-food products to Japan, representing one quarter of Japanese imports. The EU comes in as the second import origin for agri-food, but imports from the EU decreased in 2015 and thus its share among Japan's suppliers shrank from 16 % to 14 %. China is third with 12 %.

In total, various meats and meat products account for 21 % of the value of Japan's agri-food imports. Pig meat alone takes 6.5 %. Fresh and preserved fruit and

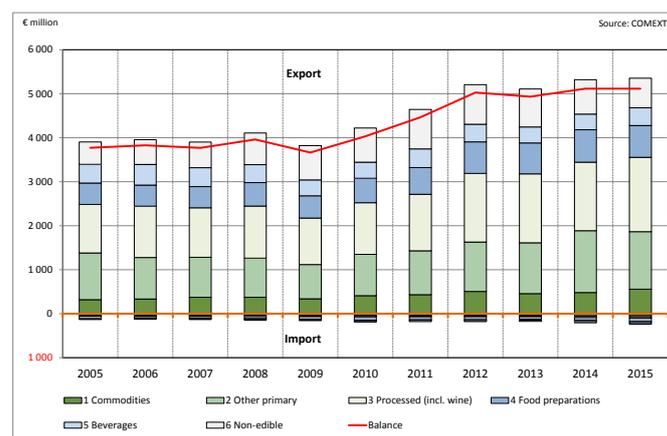
vegetables (including preparations) represent 16 % of the total, followed by cereals (11 %) and oil seeds (9 %).

Despite Japan's agri-food exports being marginal, they are on an increasing trend, growing 30 % in 2015 with a positive sign on all main markets. The top destination is Hong Kong, with China and Hong Kong combined taking 30 % of Japan's exports. Taiwan (18 %), the EU (16 %) and USA (14 %) follow. By product category, exports are led by food preparations (22 %), cereal preparations (14 %) and beverages (13.5 %).

### Japan – agri-food trade with the EU

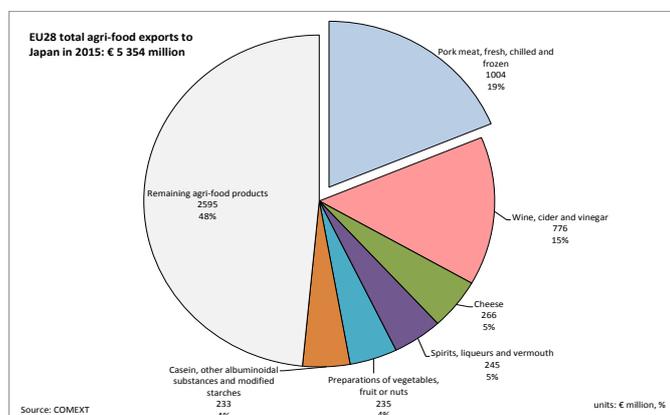
Japan has been a long-term stable export destination for a number of EU agri-food products. There was a growth period between from 2010 to 2012 when the usual export value of €4 billion reached a new plateau at around €5 billion. Given that in 2015 export value remained stable at €5.4 billion and imports were negligible, trade balance for the EU currently stands slightly above €5 billion. Japan accounts for 4 % of EU total exports and ranks fifth among top destinations very closely behind Russia.

**Graph 33: Structure of EU28 agri-food trade with Japan 2005-2015**



The top six product categories exported to Japan are some of the EU agri-food export flag ship products: pork, wine, spirits, cheese and vegetable preparations. Cigars exports, which used to occupy a place in the top, have contracted and been replaced by raw tobacco exports. The value of spirits' exports on the other hand has increased.

**Graph 34: Composition of EU agri-food exports to Japan in 2015**



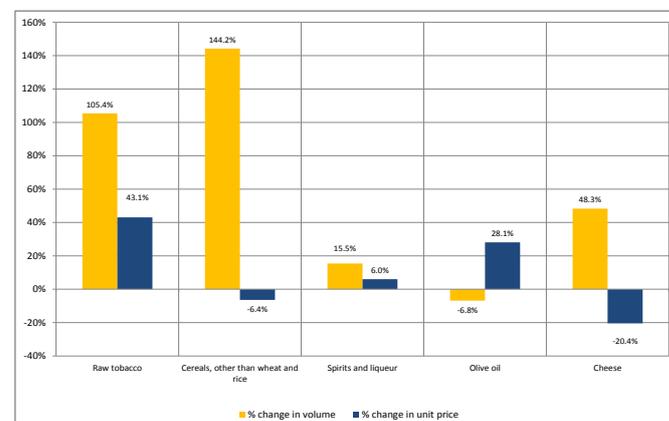
Japan has traditionally served as an important sales market for pig meat. Although the volumes exported are rather stable, the share of Japan in EU pig meat exports decreases rapidly (from 31 % to 25 % in one year alone) as other Asian markets gain importance. Yet, Japan remained the leading single destination for EU pork although exports to China doubled and combined with Hong Kong account for 28 % of the EU pork export value.

**Table 6: Japan as important destination for EU exports by product category, in 2015**

Rank	Product category	EU export to world	EU export to Japan	Japan's share in total
in EUR million				
1	Pork meat, fresh, chilled and frozen	3,957	1,004	25 %
2	Cocoa beans	15	2	23 %
3	Casein, other albuminoidal substances and modified starches	1,955	233	13 %
4	Malt	1,080	119	11 %
5	Raw tobacco	957	98	10 %
6	Olive oil	2,257	227	10 %

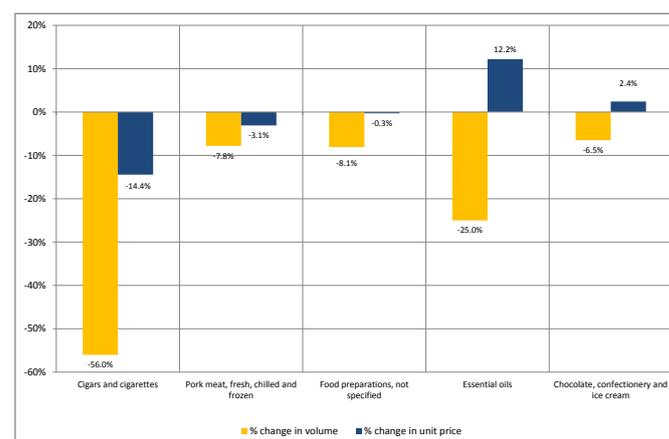
Although the total value of EU agri-food exports to Japan remained relatively stable; there were some dynamics among product groups, more apparent for products with higher degree of processing.

**Graph 35: Annual percentage change in volume and unit price for the product categories with the largest export increases to Japan in 2015**



The greatest absolute increases in exports to Japan in 2015 were achieved for raw tobacco, cereals other than wheat and rice, spirits, cheese and olive oil. For most of these products, the increase was due to considerable additional quantities traded: cereals (barley) volume tripled, raw tobacco and cheese exports were twice as high as the year before and spirits volume increased by one third. Only olive oil owed the higher export value to higher prices.

**Graph 36: Annual percentage change in volume and unit price for the product categories with the largest export decreases to Japan in 2015**



Two products stood out by absolute negative change in export value: cigars & cigarettes and pig meat. For the former, the decline in exports was counterweighed by an increase for raw tobacco. Pig meat exports were down by volume (-8 %) and the price was slightly lower (-3 %).

## 4.5. Russia

Being a net importing country for agri-food, the trade deficit of Russia has improved to €12 billion in 2015 (from €21 billion in 2013) as a result of stable exports and lower imports.

The reduction in Russia's global imports of agri-food products has been more moderate than for the bilateral trade with the EU (-€5.3 billion or -19 %).

Although the EU remains the main supplier of Russia with agri-food, its share has shrunk from 38 % in 2013 to 24 % in 2015 in favour of Belarus (12 %), China (10 %) and Turkey (5.5 %).

Russia's top import products still include fresh fruit and vegetables, meat and dairy products, although imports of meat and dairy have nearly halved after the embargo was introduced in August 2014 and their importance in imports has become less dominant. Fruit and vegetables maintain their share (22 %) in Russian total imports of agri-food.

### Russia – agri-food trade with the EU

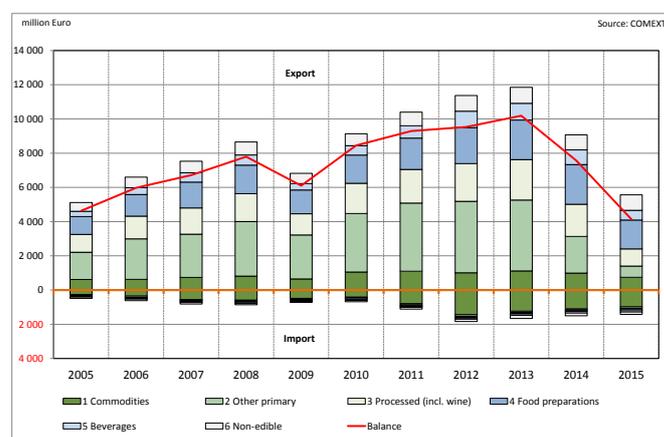
The development of agri-food trade between the EU and Russia is characterised by a complete reshuffling of the trade profile following the import embargo Russia imposed for certain EU agricultural products. While in 2014 the embargo had an impact on trade only on the last four months of the year, it affected EU exports to Russia throughout 2015.

The exchange rate between the euro and the Russian rouble was also not favourable as regards maintaining EU export flows. The value of euro against the rouble strengthened 34 % and as a consequence, European products became much more expensive for the Russian buyers. The reduced purchasing power in Russia has led to a drop in EU exports of non-banned products: beverages and food preparations lost 29 % of export value in 2015.

As a combination of these factors, EU total agri-food exports to Russia in 2015 decreased by a further 39 % from the already low level in 2014, amounting to less than €6 billion only. This is comparable to the level of exports ten years ago.

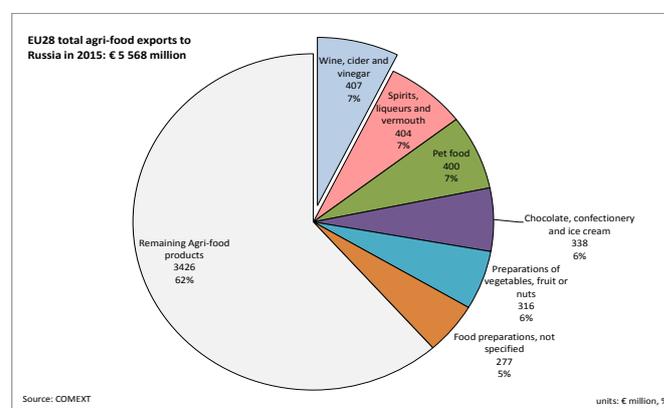
Russia now ranks only fourth among top destinations for EU agri-food exports, behind Switzerland and very close to Japan.

**Graph 37: Structure of EU28 agri-food trade with Russia 2005-2015**



Imports from Russia into the EU – marginal compared to exports – are dominated by 'commodities' with a share of 69 %.

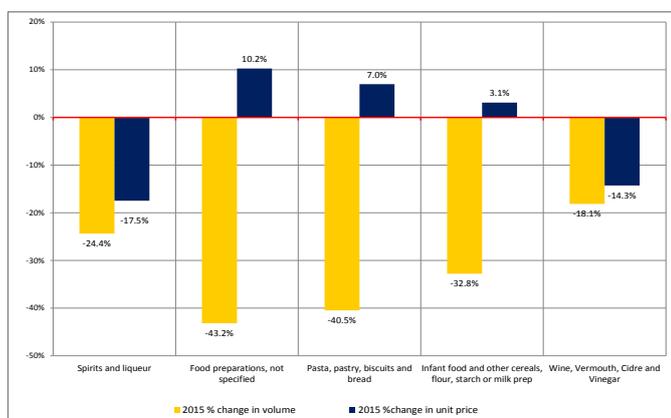
**Graph 38: Composition of EU agri-food exports to Russia in 2015**



The structure of EU exports to Russia prior to the embargo was characterised by fresh fruit and vegetables, cheese and pork accounting for more than one third of the total value of exports. By 2015, none of these products could be found in the (top) export product categories. Pork exports had disappeared (€959 million in 2013), cheese exports were valued only at €21 million (€983 in 2013) and fresh fruit and vegetables' exports were down from €2.1 billion to €185 million. Instead, the top categories now feature wine, spirits, pet food and various food preparations.

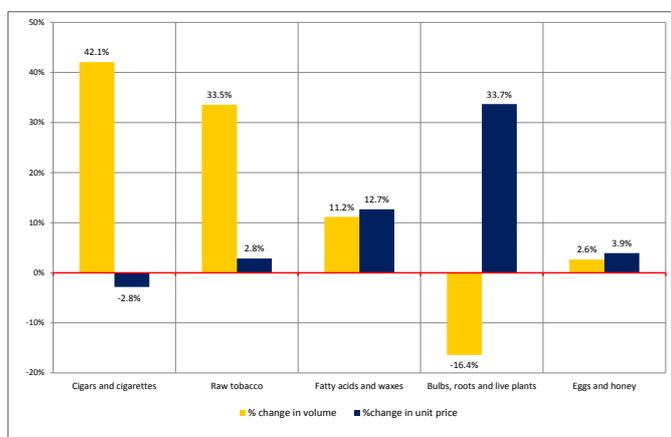
Export losses obviously dominated over gains in the trade relations with Russia. Fresh fruit and vegetables, and cheese combined lost €1.5 billion in export value. Several products not concerned by the ban also suffered from lower exports. For spirits and wines it was not only due to lower volumes exported but also the notable reduction in prices.

**Graph 39: Annual percentage change in volume and unit price for selected product categories with export decreases to Russia in 2015**



However, there were a few product groups recording increases, namely raw tobacco, cigarettes, roots and plants and eggs and honey. For tobacco products, the increasing trend continues already for several years and is fuelled by extra volumes exported.

**Graph 40: Annual percentage change in volume and unit price for selected product categories with export increases to Russia in 2015**



Russia is the most important customer for EU cut flowers eggs and honey. Other products in table 7 below are mainly EU re-exports and are not significant.

**Table 7: Russia as important destination for EU exports by product category, in 2015**

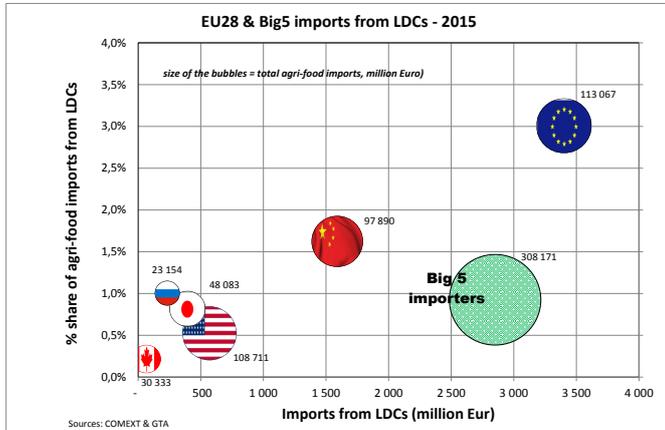
Rank	product category	EU export to world	EU export to Russia	Russian share in total
in EUR million				
1	Palm & palm kernel oils	118	56	47 %
2	Cut flowers and plants	682	246	36 %
3	Cocoa beans	15	5	33 %
4	Eggs and honey	756	189	25 %
5	Sugar alcohols	144	35	24 %

## 4.6. Least Developed Countries (LDCs)

LDCs benefit from duty-free, quota-free access to the EU market under the "Everything But Arms" scheme and many of them have concluded European Partnership Agreements with the EU, encouraging regional cooperation and trade. Concerning agriculture, provided that the products comply with the EU sanitary and phyto-sanitary requirements, the EU trade preferences for LDCs incentivise European businesses to buying products from these countries against other suppliers which have to pay regular (Most Favoured Nations) duties.

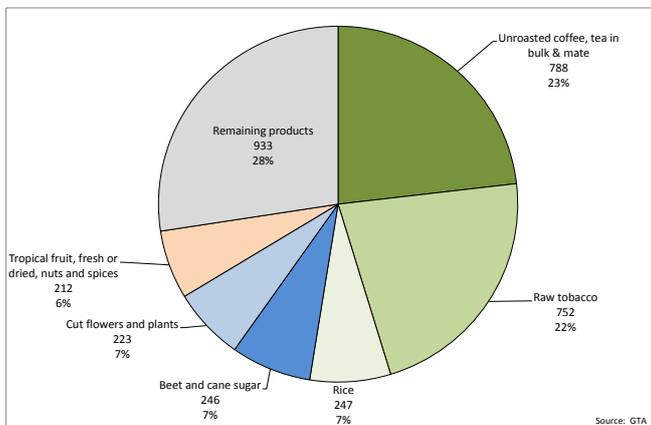
As a direct result of this policy, the EU remains by far the top importer of agri-food products from least developed countries. In 2015, the EU imported agri-food products from LDCs reached a value of €3.4 billion, up 13 % from the previous year. Compared to the purchases of the other top world importers US, China, Japan, Russia and Canada (Big5), the EU imports outnumber their individual and cumulated imports both in absolute and relative terms. While the EU sources 3 % of its total world imports in agri-food products from LDCs, the average of the individual countries of the Big5 is 0.01 %. Together, the Big5 import products worth €2.9 billion, €0.5 billion less than the EU alone. The main suppliers of the EU among the LDCs are Ethiopia, Uganda and Tanzania.

**Graph 41: EU28 and Big5 imports from LDCs in 2015**



The EU imports mostly (two thirds) basic agricultural products i.e. commodities and other primary agricultural products. The remainder consisted almost exclusively of non-edible products, raw tobacco and cut flowers and plants. About half of EU agri-food imports are composed of coffee and raw tobacco.

**Graph 42: EU agri-food imports from LDCs in 2015**



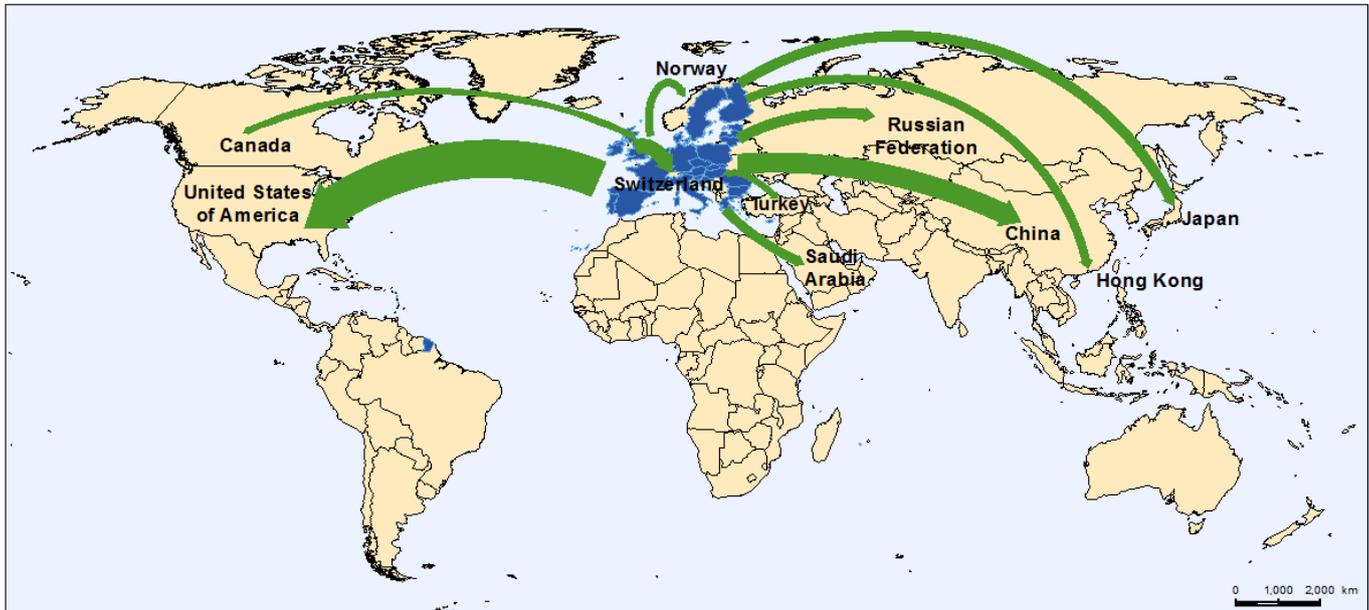
The EU also continues to be the main supplier of LDCs with agri-food products. LDCs attract 3.8 % of EU exports, valued at almost €5 billion. EU agri-food exports to LDCs reflect the strong business ties and the competitiveness of European produce. The top EU agri-food export categories to the LDCs are wheat, infant food, milk powders and whey, poultry meat, some food preparations, and wine. These products are also among the EU global top export categories. Bringing imports and exports together, the EU runs a positive trade balance with the LDCs in agri-food products, valued at about €1.5 billion.

## Annex

### Product classification

Product groups	Product classes	Product categories
Agricultural food and feed products	Commodities	Wheat
		Cereals, other than wheat and rice
		Rice
		Flours and other products of the milling industry
		Malt
		Starches, inulin & gluten
		Soy beans
		Oilseeds, other than soy beans
		Palm & palm kernel oils
		Vegetable oils other than palm & olive oils
		Oilcakes
		Other feed and feed ingredients
		Beet and cane sugar
		Sugar, other than beet & cane
		Milk powders and whey
		Butter
		Gums, resins and plant extracts
		Unroasted coffee, tea in bulk & mate
		Cocoa beans
		Cocoa paste and powder
	Agricultural commodities, not specified	
	other primary	Live animals
		Bovine meat, fresh, chilled and frozen
		Pork meat, fresh, chilled and frozen
		Poultry meat, fresh, chilled and frozen
		Sheep and goat meat, fresh, chilled and frozen
		Offal, animal fats and other meats, fresh, chilled and frozen
		Fresh milk and cream, buttermilk and yoghurt
		Eggs and honey
		Vegetables, fresh, chilled and dried
		Fruit, fresh or dried, excl. citrus & tropical fruit
		Citrus fruit
		Tropical fruit, fresh or dried, nuts and spices
		Miscellaneous seeds and hop cones
		Agricultural primary food products, not specified
	Processed (incl. wine)	Meat preparations
Cheese		
Olive oil		
Preparations of vegetables, fruit or nuts		
Fruit juices		
Wine, vermouth, cider and vinegar		
Food preparations and beverages	Food preparations	Chocolate, confectionery and ice cream
		Infant food and other cereals, flour, starch or milk preparations
		Pasta, pastry, biscuits and bread
		Soups and sauces
		Coffee and tea extracts
		Food preparations, not specified
	Beverages	Pet food
		Waters and soft drinks
		Beer
		Spirits and liqueurs
Non-edible	Non-edible	Odoriferous substances
		Raw hides, skins and furskins
		Non-edible animal products
		Wool and silk
		Cotton, flax and hemp, and plaiting materials
		Cut flowers and plants
		Bulbs, roots and live plants
		Raw tobacco
		Cigars and cigarettes
		Fatty acids and waxes
		Sugar alcohols
		Essential oils
		Ethanol
		Casein, other albuminoidal substances and modified starches
Non-edible, not specified		
Products non-attributable		

## EU-28 EXPORTS OF AGRICULTURAL PRODUCTS 2015



### Value of EU-28 exports to the main export partners

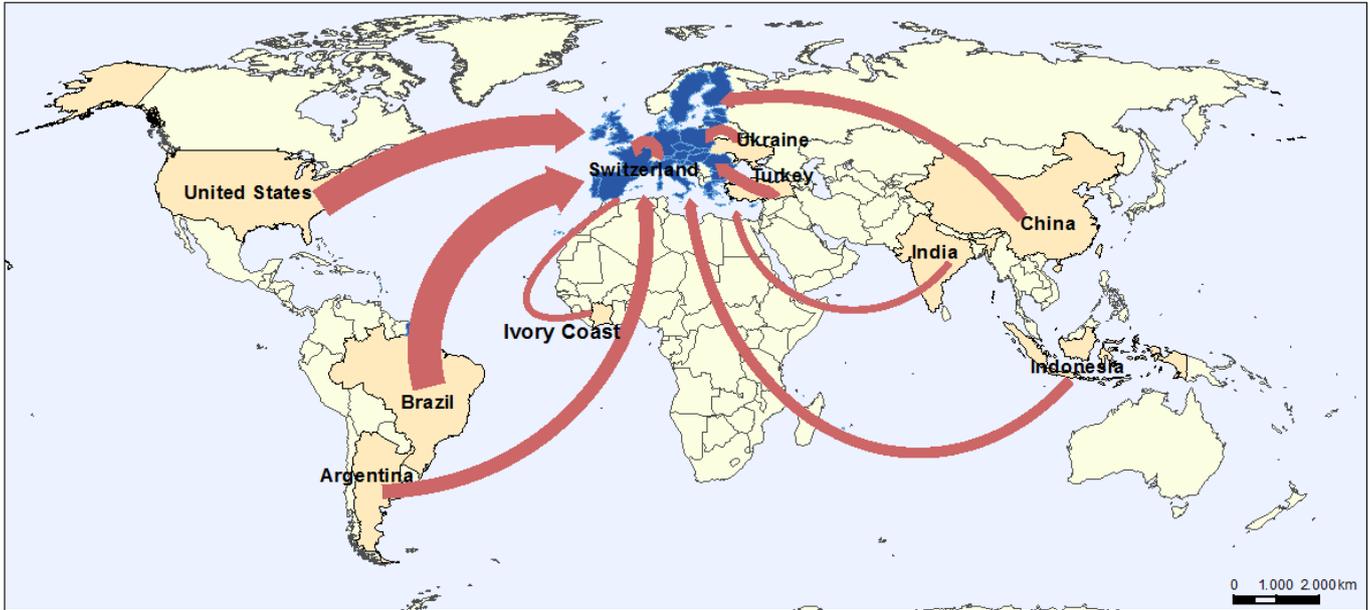


Source: Comext  
Cartography: DG AGRI GIS-Team 04/2016  
Map Projection World: Eckert III - Map Scale 1:160.000.000

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Note: The borders of the map does not necessarily represent the official position of the EU. The map has only a statistical value.

EU28: Top Destinations 2015	Value (million Euro)	Percentage
United States of America	19.408	15%
China	10.342	8%
Switzerland	7.871	6%
Russia	5.597	4%
Japan	5.354	4%
Saudi Arabia	4.793	4%
Hong Kong	4.499	3%
Norway	4.089	3%
Canada	3.420	3%
Turkey	3.405	3%
Rest of the World	60.848	47%
Extra-EU28	129.192	

## EU-28 IMPORTS OF AGRICULTURAL PRODUCTS 2015

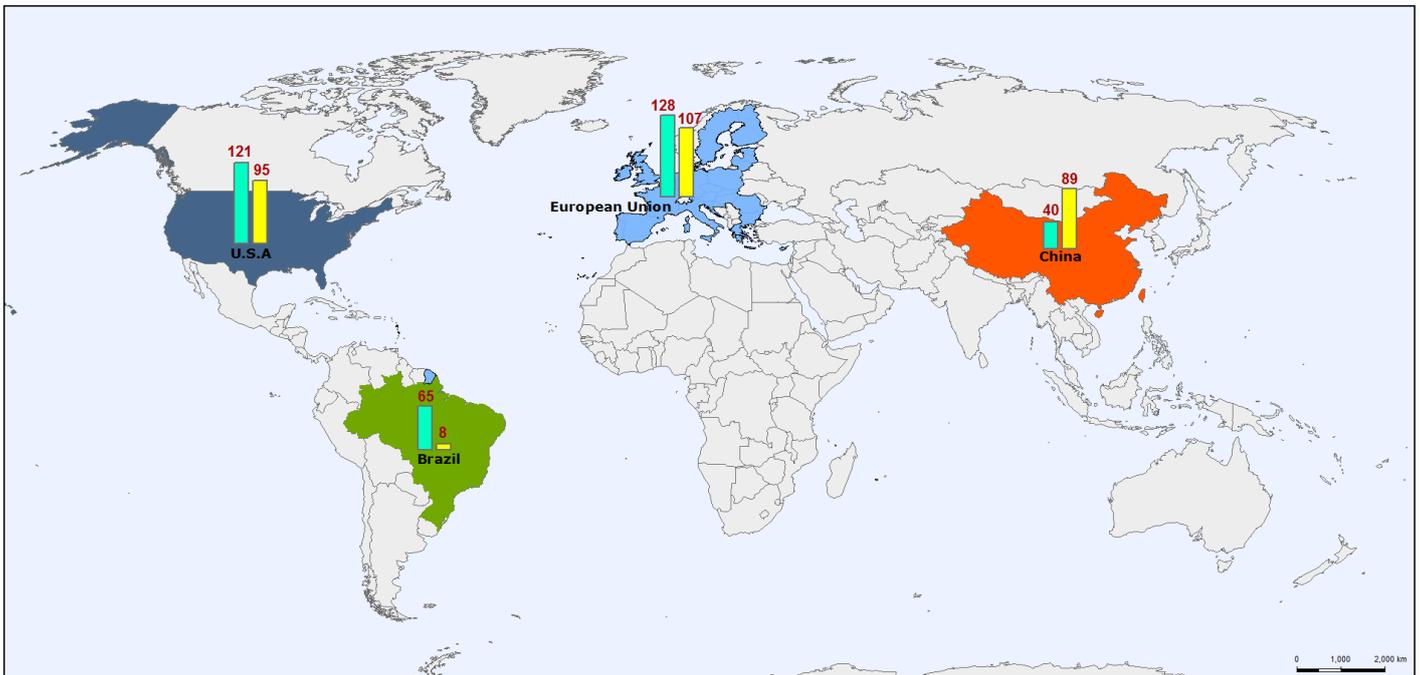


### Value of EU-28 imports from the main import partners



Source: Comext  
Cartography: D.G. AGRI GIS-Team 04/2016  
Map Projection World: Eckert III - Map Scale 1:160.000.000  
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EU28: Top Origins 2015	Value (million Euro)	Percentage
Brazil	13.143	12%
United States of America	11.971	11%
Argentina	5.782	5%
China	5.149	5%
Turkey	4.993	4%
Switzerland	4.590	4%
Indonesia	4.333	4%
Ukraine	3.998	4%
India	2.895	3%
Ivory Coast	2.709	2%
Rest of the World	53.466	47%
<b>Extra-EU28</b>	<b>113.109</b>	



Agri-Food Trade (Avg 2013-2015 in billion EUR)

Exports  
Imports

Source: COMEXT, GTA  
Cartography: DG AGRI GIS-Team 04/2016



Map Projection World: Eckert III - Map Scale 1:110.000.000

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