

Market evolution: Aliphatic hydrocarbons (CN 2901) — 2015–2025

Introduction

This report examines the European Union's trade in acyclic hydrocarbons (CN 2901) with non-EU countries from 2015 to 2025. The product group covers saturated acyclic hydrocarbons, ethylene, propene, butene, butadiene and other unsaturated acyclic hydrocarbons. The analysis draws exclusively on the data provided by the dashboard, using year-level aggregates that are already free of incomplete periods. Over the decade, the EU's position in this market changed markedly: import values expanded while export volumes contracted, the trade deficit deepened, prices rose substantially and the geography of both imports and exports was redrawn. Three main dynamics stand out: a massive reorientation of import sources toward the United States, a sharp erosion of export volumes with a simultaneous shift in destination markets, and pervasive price volatility accompanied by a slight worsening of structural vulnerability.

A new import geography: the surge of US supplies and the retreat of traditional partners

EU imports increased by a fifth in value terms while volume growth remained modest, pointing to a price-led expansion.

Over the entire period, extra-EU imports of acyclic hydrocarbons rose from €2.6 billion to €3.1 billion (+20.4%), but the quantity shipped only edged up from 3.9 million tonnes to 4.1 million tonnes (+5.5%). Consequently, the average import price per tonne climbed from €666 to €760 (+14.2%). The overall trade balance, already in deficit, widened further from -€2.0 billion to -€2.6 billion (-28.1%) (see the trade overview).

Indicator (EU imports)	2015	2025	Change
Value (EUR)	2.61 bn	3.15 bn	+20.4%
Quantity (tonnes)	3.92 mn	4.14 mn	+5.5%
Average price (EUR/tonne)	665.7	760.0	+14.2%

The United States became the overwhelmingly dominant supplier, while Russia, the United Kingdom and other former heavyweights lost ground.

The composition of EU import partners was fundamentally reshuffled. Shipments from the United States skyrocketed from €253 million to €1.53 billion, an increase of over 500%. In contrast, imports from the Russian Federation dropped by 60.9% and those from the United Kingdom by 51.8%. Flows from the United Arab Emirates virtually disappeared, and Serbia also halved its deliveries. Only Norway and Qatar managed moderate increases. This transformation is captured in detail by the top partner data.

Import partner	Value 2015 (mn EUR)	Value 2025 (mn EUR)	Change
United States	253.1	1 530.0	+504.5%
Russian Federation	491.4	192.3	−60.9%
United Kingdom	880.3	424.4	−51.8%
Norway	379.0	497.9	+31.4%
Qatar	118.4	129.5	+9.4%
Serbia	41.2	20.8	−49.4%
UAE	113.6	0.6	−100%

Import market concentration rose sharply, reflecting heightened reliance on a reduced number of large suppliers.

The Herfindahl-Hirschman index (HHI) for imports advanced from 2 108 to 3 115 (+47.8%), confirming that the supplier base has narrowed and become more concentrated (see concentration data). The US alone now accounts for nearly half of extra-EU imports, a degree of dependence that introduces new vulnerabilities.

A shrinking export footprint: falling volumes and a redirection of outflows

Export quantity collapsed by a third, far outstripping the decline in value, while export unit prices soared.

Extra-EU exports of acyclic hydrocarbons contracted from 711 thousand tonnes to 483 thousand tonnes (-32.0%), even though export value fell by a much smaller 6.9% (€576 million to €536 million). The discrepancy is explained by a 36.9% jump in the average export price, from €810 to €1 109 per tonne (see the trade overview). This suggests that the EU moved up the value chain or that cheaper-volume outlets dried up.

Indicator (EU exports)	2015	2025	Change
Value (EUR)	575.9 mn	536.0 mn	−6.9%
Quantity (tonnes)	710.7 k	483.2 k	−32.0%
Average price (EUR/tonne)	810.2	1 109.1	+36.9%

Key historical markets such as the United States and Indonesia nearly vanished, while China, South Korea and Saudi Arabia gained share.

The map of export destinations was redrawn as dramatically as that of imports. Shipments to China multiplied by more than four (from €26 million to €138 million), to South Korea by more than three, and to Saudi Arabia by 162%. Meanwhile, exports to the United States shrank by 77.8%, to Indonesia by 98.0% and to Taiwan by 89.3%. Even the United Kingdom, a top outlet, recorded a 17.5% decline. The details are available in the top export partners table.

Export partner	Value 2015 (mn EUR)	Value 2025 (mn EUR)	Change
China	26.0	138.5	+431.6%
United Kingdom	107.6	88.8	−17.5%
United States	95.3	21.1	−77.8%
Indonesia	62.6	1.2	−98.0%
Saudi Arabia	22.7	59.4	+162.2%
Taiwan	4.7	0.5	−89.3%
Korea, Republic of	12.8	41.7	+227.0%

Export destination concentration increased moderately, mirroring the narrowing of viable outlets.

The export-side HHI moved from 983 to 1 257 (+27.9%), indicating that the EU's export portfolio has also become more concentrated, albeit far less than imports. The fall of once-large markets such as the US and Indonesia forced a concentration among the remaining buyers in Asia and the Middle East (concentration data).

Price turbulence and structural vulnerability: shocks reshape the trading environment

Both import and export prices rose strongly, but export prices experienced more extreme fluctuations.

Throughout the decade, import prices went from €666 to €760 per tonne (+14.2%) while export prices jumped from €810 to €1 109 per tonne (+36.9%). The higher volatility of export prices is reflected in the coefficient of variation (CV) for key partners: exports to

Taiwan recorded a CV of 0.997, to Indonesia 0.735, to China 0.702, and to the United States 0.675. On the import side, the United States (0.790), Russia (0.593) and the United Kingdom (0.494) also showed high instability, while Norway remained relatively stable (0.259). The full volatility ranking can be found under the volatility section.

Flow	Partner	Quantity CV
Import	Brazil	1.34
Import	United States	0.79
Import	Ukraine	0.81
Import	Saudi Arabia	0.69
Import	Russia	0.59
Import	UAE	0.57
Import	United Kingdom	0.49
Import	Norway	0.26
Export	Singapore	1.23
Export	Taiwan	1.00
Export	Indonesia	0.74
Export	China	0.70
Export	United States	0.68
Export	Switzerland	0.11

Major price shocks hit specific export markets, reflecting acute supply disruptions or sudden demand shifts.

The shock-detection algorithm flagged several extreme price events. The most severe occurred in exports to Indonesia: in 2023 the average price exploded to €6 170 per tonne (+680.9% relative to the baseline), while quantities plummeted from above 100 k tonnes to less than 200 tonnes before the flow ceased entirely. Exports to Taiwan experienced a similar shock in 2022, with prices rocketing to €10 977 per tonne (+1 879.6%) and quantities collapsing to just 52 tonnes. On the import side, Russia saw a 53.3% price jump in 2021, and the United Kingdom import and export flows both underwent sharp price and quantity adjustments around the same period. The list of detected shocks is detailed in the shock events panel.

Net import reliance and trade intensity crept up slowly, while domestic production contracted, signalling a modest increase in external vulnerability.

The EU's net-import-reliance ratio (the share of apparent consumption met by net imports) started at 11.7% in 2015 and ended at 12.5% in 2024, remaining within a narrow band but drifting slightly upward. Trade intensity (total trade relative to domestic production) rose

from 15.5% to 17.5%, and export propensity from 2.3% to 3.2%. Over the same span, EU production volume declined by 15.2%, from 26.6 billion kg to 22.6 billion kg, while production value remained nearly flat (-0.6%). These indicators, available in the vulnerability dashboard, suggest that the EU's dependence on external suppliers has marginally increased, even as the product's weight in the chemical sector remains moderate.

Vulnerability indicator	2015	2024/2025	Change
Net import reliance (%)	11.7	12.5	+0.8 pp
Trade intensity (%)	15.5	17.5	+2.0 pp
Export propensity (%)	2.3	3.2	+0.9 pp
Production volume (kg)	26.6 bn	22.6 bn	-15.2%

Conclusion

Over the 2015–2025 period, EU trade in acyclic hydrocarbons underwent a profound transformation shaped by three intertwining forces. First, the import side was radically re-centred on the United States, whose share swelled at the expense of Russia, the UK and the UAE, while overall supplier concentration jumped. Second, the EU's export base shrank drastically in volume and lost several historic outlets, partially compensated by growing sales to China, South Korea and Saudi Arabia, but with a markedly higher price point. Third, the market endured repeated price shocks—most notably in Indonesian and Taiwanese exports—and a gradual, if still modest, increase in net import dependence, reinforced by a contraction in domestic production. These dynamics point to a more polarised and volatile trade environment for acyclic hydrocarbons, with the EU increasingly reliant on a narrow set of suppliers and exposed to abrupt adjustments on both the import and export fronts.

Generated on 2026-07-28 based on data from tradedashboard.eu

Auto-generated report: it accelerates, and sometimes misleads, human analysis. It cannot replace it in full.

If you need advice on European trade policy, or representation for your interests in Brussels, feel free to contact me at support@tradedashboard.eu. You can find my CV at [this address](#).