EU TRADE EXPLORER

Market evolution: Amino compounds (CN 2922) — 2015–2025

Introduction

Between 2015 and 2025, EU external trade in oxygen-function amino-compounds (CN 2922) underwent a profound transformation. Total trade values collapsed despite stable or even rising volumes, and the geography of both imports and exports shifted dramatically. This report describes the main trends — plummeting unit prices, a re-alignment of trade partners, and a restructuring among EU member states — and interprets their drivers using the data provided.

1. A decade of price deflation: value plunges while volumes remain resilient

The overriding feature of the market is a sharp drop in unit prices, which pulled trade values down even though physical flows held up or increased.

Export value fell by more than 40 %, yet export quantity barely changed

EU exports declined from € 2 157 million in 2015 to € 1 258 million in 2025, a contraction of 41.7 %. However, export volume slipped only 1.4 % over the same period. Consequently, the average export price dropped by 40.9 %, from about € 7 060 per kilogram to € 4 173.
General Overview – Trade

Import value contracted even more, while import quantity surged

Imports fell from € 4 397 million to € 2 339 million (–46.8 %), but the quantity imported rose by 41.1 %, from 665 thousand kilograms to 938 thousand kilograms. The import unit price therefore collapsed by 62.6 %, from € 6 611 to € 2 475 per kilogram.
General Overview – Trade

The trade deficit halved, and production expanded

The EU's trade balance (in value) improved from a deficit of –€ 2 239 million in 2015 to –€ 1 081 million in 2025, a 51.7 % reduction. At the same time, EU production volume grew by 64.0 % (from 588 million kg in 2006 to 964 million kg in 2024), and production value rose

by 46.6 %. This suggests that the bloc expanded its own output while relying on cheaper imports.
General Overview – Trade
Market Structure – Production

2. Re-orientation of trade flows: China cements its supplier role while EU exports pivot away from the United States

The period saw a clear shift in the EU's main trading partners, with China and other Asian countries gaining import share and the United States losing its pre-eminence as an export destination.

China dominates imports; India and Korea gain share

Chinese imports to the EU grew from € 568 million in 2015 to € 1 022 million in 2025 (+79.8 %). India and Korea, Republic of, also recorded strong increases (+66.2 % and +46.3 %, respectively). Meanwhile, imports from traditional partners such as Singapore (visible in the HHI decomposition) fell drastically, contributing to a 37.2 % decline in the import concentration index (HHI). The EU's import sources thus became more diversified, even as China deepened its leading position.
General Overview – Top Partners
Market Structure – Concentration HHI

Exports to the United States collapsed

EU exports to the United States plummeted from € 1 250 million in 2015 to € 328 million in 2025 (–73.7 %). This alone explains most of the export value decline. Export concentration (HHI) fell by 69.7 %, reflecting the loss of the dominant US market and the rise of smaller destinations.
General Overview – Top Partners
Market Structure – Concentration HHI

Other export markets show limited or no growth

Exports to the United Kingdom, China, and Switzerland remained relatively stable or declined in value. Among the top-7 destinations, only Türkiye (+56.0 %), Switzerland (+26.0 %), and Norway (+41.8 %) showed growth, but their combined value is far from offsetting the US drop.
General Overview – Top Partners

3. Internal restructuring: Ireland's export collapse reshapes EU specialisation

Within the EU, the geographic pattern of trade and production changed profoundly, most visibly through the near-disappearance of Ireland as a leading exporter.

Ireland's export role evaporates

In 2015, Ireland accounted for € 1 033 million of EU exports (nearly half of the total). By 2025, Irish exports had fallen to just € 7 million (–99.3 %). This structural shift is the primary driver behind the EU's export value decline and the drop in export concentration.
General Overview – Top Reporters

The Netherlands, Belgium, and Germany fill the gap, but at lower value

While Ireland's exports vanished, the Netherlands increased its exports from € 97 million to € 170 million (+76.5 %), Belgium from € 121 million to € 165 million (+36.5 %), and Germany remained stable around € 393 million. The Netherlands and Belgium also became the EU's most specialised member states in this product group (RSCA 0.25 and 0.39, respectively, in 2025). Nevertheless, these gains did not compensate for the loss of Ireland's high-value trade.
General Overview – Top Reporters
Market Structure – Specialisation

Imports are distributed more evenly, with Belgium losing its gateway role

On the import side, Belgium's share plummeted from € 2 617 million in 2015 to € 307 million in 2025 (–88.3 %), indicating a possible shift from a warehousing/hub model to direct imports by other member states. The Netherlands, Spain, and France all increased their imports substantially, while Germany and Italy remained stable.
General Overview – Top Reporters

Product composition highlights the importance of amino-acids

In both imports and exports, the dominant sub-heading is "Amino-acids and their esters" (292249) and "Other amino-compounds" (292250). In imports, lysine (292241) and amino-acids together represent the bulk of volume and saw significant quantity growth but declining unit prices.
Product Segment Breakdown

Conclusion

The EU market for oxygen-function amino-compounds from 2015 to 2025 was defined by a steep fall in unit prices that far outweighed solid volume trends. The value of trade collapsed, but the EU reduced its external deficit and expanded its own production. China became the dominant import supplier, while the United States ceased to be the key export outlet, and Ireland’s exit as the main EU exporter redistributed trade within the bloc. Despite some diversification, the market remains highly sensitive to price shocks — as illustrated by sharp unit-value spikes in 2021–2022 for several partners — and to the evolving industrial strategies of both EU member states and foreign suppliers.

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