Market evolution: Animal feed (CN 2309) — 2015–2025

Introduction

Preparations of a kind used in animal feeding (CN 2309) cover both bulk feed preparations and dog or cat food put up for retail sale. The decade from 2015 to 2025 saw a profound transformation in the European Union's trade of these products with non-EU countries. Growth was driven by strong demand, significant inflation in unit prices, a geographical rebalancing of suppliers and customers, and a marked shift towards higher-value pet food. This report examines the main dynamics, using official trade data to describe and interpret the evolution of EU exports and imports over the period.

1. A Decade of Uninterrupted Value Growth and Price Inflation

The value of EU animal feed trade more than doubled, while the trade surplus expanded sharply

Between 2015 and 2025, the total value of EU exports of CN 2309 rose from EUR 4.04 billion to EUR 8.07 billion, an increase of 99.9 %. Imports grew from EUR 1.47 billion to EUR 2.70 billion (+83.5 %). Because exports grew faster than imports, the EU's trade surplus widened from EUR 2.56 billion to EUR 5.37 billion, a jump of 109.3 % (Trade flows overview).

Quantity growth was modest, meaning that price inflation drove most of the increase

Volumes expanded far less than values. Export quantities rose by 31.7 % and import quantities by 23.8 % over the whole window. As a result, unit prices climbed substantially: average export prices reached EUR 1 802 per tonne in 2025, up 51.7 % from EUR 1 188 in 2015, while import prices ended at EUR 1 573 per tonne, 48.3 % higher than the EUR 1 061 recorded at the start of the period (Trade flows overview).

Indicator	2015	2025	Change
Exports (EUR)	4 036 267 330	8 068 201 681	+99.9 %
Imports (EUR)	1 472 471 815	2 702 568 750	+83.5 %
Trade balance (EUR)	2 563 795 515	5 365 632 931	+109.3 %
Export quantity (tonnes)	3 398 618	4 476 851	+31.7 %
Import quantity (tonnes)	1 388 117	1 718 432	+23.8 %
Export price (EUR/tonne)	1 188	1 802	+51.7 %
Import price (EUR/tonne)	1 061	1 573	+48.3 %

2. Geopolitical Reshuffling and Supply Chain Diversification

The United Kingdom remained the largest partner, but post-Brexit trade relations evolved

The UK was the dominant destination for EU exports and the top source of imports throughout the period. Exports to the UK grew from EUR 951 million to EUR 1 848 million (+94.2 %), while imports from the UK edged up from EUR 619 million to EUR 662 million (+7.0 %), exhibiting notably low year-on-year volatility (coefficient of variation of 0.07 on import quantities). A clear price shock occurred on UK imports centred on 2020, when the unit price jumped by 11.2 % amid the COVID-19 disruption, before partially correcting (Top trading partners, Detected price shocks).

China and Liechtenstein became import giants, while Russia collapsed as an export market

The geographical pattern of imports changed dramatically. Chinese shipments rocketed by 408.9 %, from EUR 125 million to EUR 637 million, making China a top-tier supplier alongside a notable price shock in 2021 (+50.8 % unit price). Imports from Liechtenstein exhibited an extraordinary 1 578.9 % surge, propelled by niche high-value flows. In contrast, exports to the Russian Federation – an initially major customer – peaked at EUR 513 million in 2021 before collapsing to EUR 236 million by 2025 (−37.4 % overall), largely due to the post-2022 sanctions regime. Exports to Ukraine, meanwhile, expanded by 257.5 %, reaching EUR 338 million in 2025 (Top trading partners).

Import sourcing became much less concentrated, while export markets remained broadly diversified

The Herfindahl-Hirschman Index (HHI) for import value fell from 2 311 in 2015 to 1 510 in 2025, a decline of 34.7 %, reflecting a meaningful broadening of the EU's supply base. On the export side, the HHI was already low and decreased modestly by 9.0 %, remaining around 712, indicating that EU exports continued to be spread across many destinations without heavy reliance on any single market (Market concentration).

3. The Premiumisation Shift: Pet Food Outpaces Bulk Feed

Dog and cat food (CN 230910) rapidly gained ground over other feed preparations (CN 230990)

The product group CN 2309 bundles two distinct sub-segments: retail dog or cat food (230910) and all other animal feed preparations (230990). Both grew, but pet food far outpaced bulk feed.

- Exports of pet food surged from EUR 1 718 million to EUR 4 022 million (+134.1 %), while bulk feed exports rose from EUR 2 319 million to EUR 4 047 million (+74.5 %).
- Imports of pet food climbed from EUR 791 million to EUR 1 656 million (+109.3 %), against a smaller increase for bulk feed, from EUR 681 million to EUR 1 046 million.

By 2025, pet food accounted for roughly half of all exports and over 60 % of imports by value, up from just over 42 % and 54 % respectively in 2015 (Product segment comparison).

Unit prices for pet food were structurally higher and rose faster

Pet food consistently commanded a large price premium over bulk feed. In 2025, the average export price of dog/cat food stood at EUR 2 257 per tonne compared with EUR 1 501 for other preparations; on imports the gap was even wider (EUR 3 255 versus EUR 865). Moreover, those premiums widened appreciably over the decade, as pet food prices rose more sharply, reflecting growing consumer willingness to pay for premium pet nutrition (Product segment comparison).

Several Central and Eastern European member states consolidated strong specialisations

Within the EU, the most specialised exporters in 2025 were Hungary (RSCA 0.35), Poland (RSCA 0.25) and Lithuania (RSCA 0.24), underscoring the emergence of these countries as competitive production hubs. Poland’s exports to non-EU destinations rocketed by 611.8 %, from EUR 96 million to EUR 681 million. By contrast, large economies such as Germany and the Netherlands remained major traders but showed no strong relative specialisation (Specialisation indices, Top member state traders).

Conclusion

EU trade in animal feed preparations (CN 2309) underwent a rapid, multi-faceted expansion between 2015 and 2025. The total value of flows with non-EU partners roughly doubled, propelled more by rising unit prices than by volume gains, and Europe's trade surplus reached new highs. Geopolitical events reshaped trade routes: China ascended as a key supplier, Liechtenstein rose as a niche import source, and Russia's share of EU exports plummeted after 2022, while supplier diversification increased markedly. At the same time, the structure of trade tilted decisively towards higher-value pet food. This premiumisation, together with the emergence of Central and Eastern European member states as specialised producers, defines the new competitive landscape of the sector. Looking ahead, the interplay of sustained pet-food demand, input cost inflation, and evolving trade partnerships will likely continue to steer the market's trajectory.

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