EU TRADE EXPLORER

Market evolution: Animal products not elsewhere specified (CN 05) — 2015–2025

Introduction

Customs code 05 covers a diverse set of products of animal origin not specified elsewhere – from guts and bird skins to bones, ivory and pharmaceutical glands. This report examines the European Union's extra-EU trade in these goods between 2015 and 2025, drawing on the dashboard data made available for the full product heading. Over the decade, the EU's position shifted markedly: despite a persistent deficit, the dependence on imports fell sharply as domestic production strengthened, while trade flows were reshaped by partner diversification and intense price shocks.

A quiet transformation in self-sufficiency: from substantial import reliance to a lighter footprint

Domestic output has grown faster than trade volumes, reducing net-import exposure

While extra-EU trade values rose, the physical quantities moved across borders stagnated or declined. EU import volumes fell by 9.8 % and export volumes by 3.9 % between 2015 and 2025, yet values expanded by 24.0 % (imports) and 19.2 % (exports). This reflects strong unit-value inflation. Behind the trade numbers, EU production of CN 05 goods increased from €1 342 million in 2015 to €1 615 million in 2024 (+20.4 %), while output in tonnes rose by 7.6 % Production value. Consequently, the net-import-reliance ratio fell from 20.0 % in 2015 to 14.0 % in 2024, after touching a low of 10.4 % in 2020 Net-import reliance.

Export propensity has remained consistently high, above 55 %

The share of EU production sold outside the Union stayed elevated throughout the period, moving from 59.3 % in 2015 to 58.2 % in 2024 Export propensity. This indicates that many EU member states are structurally geared towards servicing external markets, with producers in Denmark, Poland, Spain and Portugal showing the highest specialisation in 2025 Most specialised reporters. The persistent export orientation, combined with growing domestic output, allowed the EU to shrink its external deficit from €295 million in 2015 to

€415 million in 2025 – a smaller deterioration than what pure value growth would imply, given the narrowing volume gap.

Unit-values outpaced quantities, inflating trade balances in euro terms

The average unit-value of EU imports (€/tonne) rose from 1 557 to 2 139 (+37.4 %), while the export unit-value climbed from 1 652 to 2 048 (+24.0 %) Trade overview. The stronger import-side price acceleration, especially in 2022 and 2025, kept the trade balance negative and partly offset the volume-side improvement.

Flow	2015 (€ m)	2025 (€ m)	Change	2015 (k tonnes)	2025 (k tonnes)	Change
Exports	1 041	1 240	+19.2%	630	605	–3.9%
Imports	1 336	1 656	+24.0%	858	773	–9.8%
Balance	–295	–415	–40.9%	–	–	–

Geographic realignment: from traditional European partners to Asia and the Americas

Import sources pivoted towards China and Brazil, while European neighbours lost weight

China remained the largest supplier, its imports climbing by 34.1 % to €739 million. Brazil recorded a 54.4 % jump to €96 million, while the Faroe Islands' deliveries surged 59.6 % (off a small base). In contrast, imports from the United Kingdom (–32.0 %), Iceland (–42.3 %), Norway (–18.2 %) and Switzerland (–13.3 %) all contracted Top import partners. The Herfindahl-Hirschman index for import concentration rose from 1 933 to 2 205 (+14.0 %), underscoring the growing dominance of a few Asian suppliers Concentration HHI.

Import partner	2015 (€ m)	2025 (€ m)	Change
China	551	739	+34.1%
United Kingdom	123	84	–32.0%
Brazil	62	96	+54.4%
Norway	60	49	–18.2%
Switzerland	24	21	–13.3%
Iceland	8.6	4.9	–42.3%
Faroe Islands	5.2	8.3	+59.6%

Export destinations diversified, with the US and Vietnam absorbing the decline of Hong Kong and the UK

EU exports to the United States more than doubled (+128.2 %), reaching €138 million, while shipments to Vietnam grew by 118.7 % (to €107 million) and to Norway by an exceptional 198.4 % (to €73 million). These gains compensated for the collapse of sales to Hong Kong (–81.3 %, down to €28 million) and the modest decreases to China (–2.3 %) and the UK (–9.0 %). The export HHI fell from 1 009 to 758 (–24.9 %), confirming a broader spread of destinations Concentration HHI.

Export partner	2015 (€ m)	2025 (€ m)	Change
China	238	233	–2.3%
United Kingdom	120	109	–9.0%
Hong Kong	151	28	–81.3%
United States	60	138	+128.2%
Vietnam	49	107	+118.7%
Norway	24	73	+198.4%
Liechtenstein	10	28	+168.1%

Member-state export performance reflects specialisation dynamics

Poland emerged as a standout exporter, its extra-EU sales soaring 162.8 % to €153 million. Italy (+96.7 %), Denmark (+70.6 %) and Spain (+53.4 %) also posted strong gains. Germany, the historical leader, saw its exports shrink by 25.4 % to €182 million, while the Netherlands recorded a 14.4 % decline Top reporters. The shift underlines the growing role of central, eastern and Iberian member states in processing and trading animal by-products.

Price shocks and supply volatility: the new pulse of the animal by-products market

The gut-and-stomach segment dominates, but feathers and pharmaceutical items drive price extremes

Subheading 0504 (guts, bladders and stomachs) accounted for roughly two-thirds of import value and about half of export value throughout the period Product segment breakdown. Its import prices rose from €7 500 to €8 921 per tonne, while export prices advanced from €2 578 to €3 597. Meanwhile, feathers and down (0505) displayed extraordinary price gyrations – import unit-values jumped from €2 317 in 2015 to €6 938 in 2025, while export prices oscillated between €3 536 and €12 657 due to demand and sanitary events. Pharmaceutical animal products (0510) also experienced a steep revaluation, with import prices leaping from €1 657 to €6 808 per tonne.

Sharp price shocks hit key partners in 2022–2023

The price-shock detection algorithm flagged several abnormal events. Most notably, Brazilian import prices surged 58.2 % in 2022, accompanied by a volume spike, reflecting a supply squeeze in the raw material markets Price shocks. Imports from the Faroe Islands saw a 90.5 % price jump in 2023, while on the export side the Philippines recorded a 140.4 % price leap in 2022, heavily driven by changes in pharmaceutical-use glands. European exports to the United Kingdom experienced a 27.1 % price drop in 2019, a likely consequence of the post-Brexit adjustment period.

Volatility remains elevated for smaller, supply-constrained origins

Quantity flows from Iceland (CV 0.62), the Faroe Islands (CV 0.72) and Russia (CV 0.51) exhibited high annual variability, reflecting the sensitivity of these suppliers to climatic, regulatory and geopolitical disruptions Volatility bars. On the export side, Norway (CV 0.91), Thailand (CV 0.63), Ecuador (CV 0.73) and the Philippines (CV 0.72) were equally erratic, often tied to single-commodity streams. The concentration of shocks in these niche flows underscores the importance of supply-chain diversification for EU processors.

Conclusion

Between 2015 and 2025, EU extra-EU trade in animal products not elsewhere specified underwent a profound rebalancing. The Union reduced its net import reliance from 20 % to 14 % thanks to resilient domestic production, while export propensity remained above 55 %. Geographically, import sources tilted further towards China and Brazil, whereas exports found dynamic growth in the United States, Vietnam and Norway, offsetting the collapse of the Hong Kong hub. Price turbulence, particularly in the gut, feather and pharmaceutical glands segments, introduced new risks, but overall market concentration in exports diminished, signalling a more diversified and resilient trading footprint. The data suggest that, even with a chronic trade deficit, the EU's animal by-product sector has become less vulnerable and more integrated into global value chains.

Generated on 2026-07-24 based on data from tradedashboard.eu

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