EU TRADE EXPLORER

Market evolution: Antibiotics (CN 2941) — 2015–2025

Introduction

The EU external trade in antibiotics (CN 2941) underwent significant structural change over the decade 2015–2025. Total trade volumes contracted, the unit values of exports and imports diverged sharply, and the geography of both supply and demand shifted toward Asia. At the same time, the EU's overall import reliance fell modestly while export specialisation increased. The following analysis describes these dynamics in three thematic sections, using the data available on the Trade Dashboard.

A Shrinking Market with Diverging Price Dynamics

Overall trade values declined, led by a sharp fall in volumes.

Between 2015 and 2025, EU extra-EU exports of antibiotics fell by 18.4 % in value (from €1 325 million to €1 082 million) and by 33.7 % in quantity (from 9 729 tonnes to 6 455 tonnes). Imports contracted by 21.9 % in value (€2 454 million to €1 916 million) and by 19.5 % in quantity (19 204 tonnes to 15 457 tonnes). The trade deficit consequently narrowed by 26.1 %, from –€1 129 million to –€835 million Trade Overview.

Indicator	2015	2025	Change
Exports (million €)	1 324.97	1 081.67	–18.4 %
Exports (tonnes)	9 728.6	6 454.9	–33.7 %
Imports (million €)	2 454.15	1 916.26	–21.9 %
Imports (tonnes)	19 203.9	15 456.6	–19.5 %
Trade balance (million €)	–1 129.18	–834.59	+26.1 %

Export unit prices surged, while import prices stagnated.

The average unit value of EU exports rose from €136 077 per tonne to €167 206 per tonne (+22.9 %), whereas import unit prices edged down from €127 737 to €123 942 (−3.0 %). This price divergence indicates that the EU increasingly concentrated on higher-value, often specialised antibiotic substances, while importing relatively cheaper bulk active ingredients.

The overall market concentration in value terms declined for both imports and exports.

The Herfindahl-Hirschman Index (HHI) for imports fell from 3 046 to 2 541 (−16.6 %), and for exports from 1 098 to 820 (−25.3 %). Fewer transactions were dominated by a single large partner by value Concentration HHI.

Geopolitical Rebalancing: The Rise of Asian Partners and the Retreat of Traditional Suppliers

China and India replaced Switzerland and the United States as the main trade drivers.

On the import side, China expanded its share solidly (€553 million to €653 million, +18.2 %), and India more than doubled (€73 million to €137 million, +87.4 %). In contrast, imports from Switzerland collapsed from €1 184 million to €641 million (−45.9 %), and those from the United Kingdom (−80.1 %) and Singapore (−48.8 %) shrank dramatically.

Exports to China jumped from €71 million to €150 million (+109.9 %) and to India from €69 million to €134 million (+93.7 %). Meanwhile, exports to Switzerland fell from €311 million to €126 million (−59.5 %) and to the United States from €231 million to €142 million (−38.4 %).

Trade flow	Partner	2015 (M€)	2025 (M€)	Change
Imports	China	552.7	653.2	+18.2 %
Imports	India	73.0	136.8	+87.4 %
Imports	Switzerland	1 183.5	640.7	–45.9 %
Imports	United Kingdom	78.3	15.6	–80.1 %
Exports	China	71.3	149.6	+109.9 %
Exports	India	69.4	134.4	+93.7 %
Exports	Switzerland	310.8	125.8	–59.5 %
Exports	United States	231.0	142.2	–38.4 %

Source: Top Partners by Value

Within the EU, a dramatic reshuffling of trade among Member States took place.

Germany’s extra-EU imports of antibiotics plummeted from €762 million to €234 million (−69.3 %), while Italy remained the top importer (€615 million to €622 million, +1.0 %) and the Netherlands increased strongly (€160 million to €246 million, +53.3 %). Among exporters, Ireland virtually disappeared from the top ranks (€240 million to €6 million, −97.4 %), whereas Denmark (+36.9 %) and Hungary (+14.2 %) gained ground Top Reporters by Value.

A statistical anomaly inflated recorded trade with “unspecified” territories until 2021.

Both imports and exports recorded for “Countries and territories not specified …” rose steeply until 2021 (imports: €19 million to €93 million, +386.9 %; exports: €46 million to €58 million) but then disappeared from the dataset thereafter, suggesting a change in reporting practices rather than a genuine trade surge.

Resilience through Specialisation: High-Value Exports Offset Import Reliance

The “other antibiotics” segment dominates trade and shows opposing price trends.

Sub-heading 294190 (“Antibiotics (excl. penicillins, streptomycins, tetracyclines, chloramphenicol and erythromycin)”) accounted for the bulk of both imports (€1 595 million in 2025) and exports (€911 million). Its import unit price declined from €211 311 per tonne to €193 834, whereas its export unit price rose from €166 496 to €185 267, narrowing the gap. For the narrower categories, however, export prices far exceeded import prices: tetracyclines (export price €331 656 vs. import price €36 157), erythromycin (€367 830 vs. €115 179) and streptomycins (€230 228 vs. €32 485) illustrate a clear division of labour where the EU exports high-value derivatives and imports low-value bulk molecules Product Segment Breakdown.

Sub-heading	Import value 2025 (M€)	Import price (€/t)	Export value 2025 (M€)	Export price (€/t)
294190	1 595.0	193 834	911.0	185 267
294110	114.1	39 468	70.6	60 468
294130	109.6	36 157	81.5	331 656
294150	74.5	115 179	17.0	367 830
294120	11.6	32 485	2.9	230 228
294140	15.6	49 474	2.7	27 827

A series of price shocks on exports points to supply-side disruptions, not systemic import risks.

The shock detection algorithm identified only export-side price shocks, none on the import side. Notable events include a 959 % price spike to the Philippines in 2019 and a 534 % surge to China in 2022, both accompanied by sharp volume drops. These are typical of temporary supply constraints or demand surges for specific niche products, rather than chronic vulnerability Volatility & Shocks.

The EU’s net import reliance has moderately decreased, while production volume edged up.

Net import reliance fell from 25.8 % to 21.9 % between 2015 and 2024 (–14.9 % in relative terms). EU production volume increased slightly from 38.98 million kilogrammes (2006 estimate) to 40 million kilogrammes in 2024 (+2.6 %), yet production value dropped from €2 965 million to €2 583 million (−12.9 %), confirming that domestic manufacturing moved toward lower-valued output, while high-value trade was sustained through exports. Export propensity (exports as a share of production) decreased from 49.9 % to 46.7 %, suggesting a slight re-orientation toward internal EU demand or stockpiling Autonomy & Vulnerability.

Conclusion

The EU antibiotics market between 2015 and 2025 can be summarised as a contraction in physical volumes combined with a value-based upgrading of exports. The centre of gravity of trade shifted decisively toward Asia, with China and India growing as both suppliers and customers, while traditional European partners (Switzerland, UK) lost prominence and Ireland’s export role collapsed. The divergence between high export prices and modest import prices reflects a specialisation pattern where the EU increasingly focuses on high-value, derivative antibiotics and imports cheaper bulk active ingredients. At the same time, import reliance declined moderately and export-side shocks, though frequent, did not translate into import-side vulnerabilities. The industry therefore appears to have become more resilient, albeit more concentrated in a few Member States and more dependent on Asian trade routes.

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