EU TRADE EXPLORER

# Market evolution: Beer (CN 2203) — 2015–2025

## Introduction

Between 2015 and 2025, the European Union's external trade in beer made from malt (CN 2203) underwent a profound reshaping. Overall export value contracted while import value grew, narrowing the trade surplus. Quantities moved in opposite directions, and unit prices diverged sharply. Geopolitical disruptions, shifting consumer preferences, and structural realignments within the EU membership re-drew the map of trading partners. This report describes and interprets those dynamics using the official trade data, emphasising the contrasting trends in volumes, prices, partner composition, market concentration, and volatility.

## The Eroding Export Engine: Falling Volumes Meet Rising Import Prices

### Overall export value fell by 12 %, while import value rose by 26.8 %, compressing the trade surplus from €3 billion to €2.48 billion.

The EU's beer trade surplus shrank by 17.3 % over the period, moving from €3,998 million in 2015 to €2,481 million in 2025Trade overview. Exports dropped from €3,409 million to €3,001 million, while imports climbed from €411 million to €521 million.

| Flow | Indicator | 2015 | 2025 | Change |
|---|---|---|---|---|
| Exports | Value (€) | 3 409 063 470 | 3 001 260 785 | –12.0 % |
| Exports | Quantity | 3 804 188 | 3 174 432 | –16.6 % |
| Exports | Price (€/unit) | 896.13 | 945.45 | +5.5 % |
| Imports | Value (€) | 410 587 132 | 520 619 066 | +26.8 % |
| Imports | Quantity | 481 458 | 467 473 | –2.9 % |
| Imports | Price (€/unit) | 852.80 | 1 113.68 | +30.6 % |
| Balance | Value (€) | 2 998 476 338 | 2 480 641 719 | –17.3 % |

### Export volumes contracted much more sharply than import volumes, signalling a significant loss of market share abroad.

While import quantity dipped by only 2.9 %, export quantity plummeted by 16.6 %. The EU shipped 3.8 million tonnes (in the dataset's unit) to non-EU markets in 2015 but only

3.2 million tonnes in 2025. This volume erosion points to a weakening competitive position, especially in key long-haul markets, even as domestic import demand proved resilient.

### Unit price trends diverged dramatically: EU export price growth remained modest, whereas the import price soared, squeezing purchasing power.

Export prices edged up from €896 to €945 per unit (+5.5 %), indicating only mild inflationary pressure and perhaps a shift towards higher-value exports. In contrast, the average import price jumped from €853 to €1 114 per unit (+30.6 %), driven by costlier supply, exchange-rate effects, and probably a compositional shift toward premium imported brands. This asymmetry means that while exported beer retained price competitiveness, imported beer became substantially more expensive for EU consumers.

## Geopolitical Cascades and the Redrawing of Trade Maps

### The United States, once the EU's dominant beer buyer, saw export value crater by 47.3 %, whereas the United Kingdom remained remarkably stable.

In 2015, the US absorbed €1,243 million of EU beer; by 2025 this had fallen to €655 million, a drop of 47.3 %Top partners. The UK, by contrast, stayed nearly flat (€443 million to €443 million, –0.0 %). EU exports to China also receded by 28.4 %, while Canada fell 20.8 % and South Korea 13.6 %. These downswings were partly offset by expansion in the "Other" partner category, which grew from €933 million to €1,274 million, absorbing some of the lost demand.

| Partner | 2015 Exports (€) | 2025 Exports (€) | Δ |
|---|---|---|---|
| United States | 1 242 979 701 | 654 697 882 | –47.3 % |
| United Kingdom | 443 021 221 | 442 902 078 | –0.0 % |
| China | 418 894 348 | 299 995 937 | –28.4 % |
| Canada | 167 042 245 | 132 374 610 | –20.8 % |
| Russian Federation | 68 860 706 | 67 822 911 | –1.5 % |

### Imports from the UK and Mexico surged, while flows from Belarus and the US collapsed, reflecting sanctions and commercial redirection.

On the import side, the UK cemented its position as the top supplier, rising from €218 million to €301 million (+38.2 %). Mexico expanded by 52.7 % (€75 million to €115 million). In stark contrast, imports from Belarus collapsed by 95.9 % (€4.9 million to €0.2 million) following EU sanctions, and US-origin imports fell 76.0 % (€44.2 million to €10.6 million). China, however, almost doubled its shipments (+90.8 %, to €18.3 million).Top partners

| Partner | 2015 Imports (€) | 2025 Imports (€) | Δ |
|---|---|---|---|
| United Kingdom | 217 875 431 | 301 014 870 | +38.2 % |
| Mexico | 75 278 037 | 114 986 747 | +52.7 % |
| United States | 44 181 665 | 10 590 433 | –76.0 % |
| Belarus | 4 899 392 | 200 908 | –95.9 % |
| China | 9 569 602 | 18 257 475 | +90.8 % |

### The Russia-Ukraine conflict triggered extreme trade volatility, with Russian exports first booming then plummeting, while Ukrainian flows experienced sharp price shocks.

EU exports to Russia surged from €69 million in 2015 to a peak of €262 million in 2023, before collapsing to €68 million in 2025 as sanctions tightened. Ukrainian imports saw a severe price shock in 2022, when the unit price jumped 42 % while volume dropped, reflecting war-related supply disruptions and logistics cost surgesPrice shocks. On the export side, Ukraine itself experienced a price shock in 2023 (+25.5 %) as EU-bound orders were repriced. These events underscore how deeply political and military crises can ripple through the beer trade.

## Structural Cohesion and Fragmentation: Concentration, Specialisation, and Shocks

### Export market concentration fell sharply, while import concentration rose, indicating a more diversified sales portfolio but a narrower supplier base.

The Herfindahl-Hirschman Index (HHI) for export value dropped from 1 722 in 2015 to 898 in 2025 (–47.9 %)Concentration. The US's declining share was absorbed by a broad set of smaller partners, broadening the EU's export base. Conversely, import HHI climbed from 3 298 to 3 881 (+17.7 %), driven by the growing weight of the United Kingdom and Mexico, which together now account for a larger proportion of extra-EU beer purchases.

### A clear specialisation divide separates the EU's highly beer-focused exporting nations from those that are far less oriented toward beer trade.

Using the revealed symmetric comparative advantage (RSCA) for 2025, Belgium stands out as the most specialised beer exporter (RSCA 0.60), followed by Luxembourg (0.34), Estonia (0.30), Denmark (0.29), and Portugal (0.26)Specialisation. These member states concentrate a disproportionate share of their total exports in beer. At the other extreme, Slovakia (RSCA –0.83), Bulgaria (–0.79), Hungary (–0.78), Romania (–0.71), and Sweden (–0.67) are the least specialised, meaning beer plays a marginal role in their export baskets.

## The top beer-exporting EU member states saw divergent fortunes, with Belgium and the Netherlands losing ground while Spain and Italy gained.

Among the leading reporters, the Netherlands remained the largest exporter but its value fell from €1,334 million to €979 million (–26.6 %)Top EU member states. Belgium's exports almost halved (–49.8 %, to €248 million), while Germany's declined by 13.9 %. In contrast, Spanish exports surged by 58.1 % (to €261 million) and Italian exports rose 49.3 % (to €171 million). The rising Mediterranean exporters partially offset the losses of the traditional northern players.

## Imports through individual member states changed dramatically, with French, Spanish, and Irish imports booming while Italian, Swedish, and Belgian imports contracted.

Ireland (€156 million, +65.0 %), France (€68 million, +108.4 %), Spain (€73 million, +214.2 %), and the Netherlands (€47 million, +115.8 %) saw the largest import value increases, often linked to their role as distribution hubs or growth in consumer demand for foreign brands. Meanwhile, Italy (–42.9 %), Sweden (–59.4 %), and Belgium (–79.9 %) recorded sharp declines, perhaps reflecting a shift in sourcing toward intra-EU channels.

## High volatility and detectable price shocks in peripheral markets underline the precariousness of certain trade flows.

Quantity flows from Belarus (CV 0.76), the United States (CV 0.53), and Morocco (CV 0.92) into the EU were extremely erratic, while exports to Cuba (CV 0.93), Russia (CV 0.53), and South Korea (CV 0.38) showed high instabilityVolatility. Four major price shock events were detected: a 56.9 % export price jump to the United Arab Emirates in 2019; a 42.0 % import price surge from Ukraine in 2022; a 25.5 % export price hike to Ukraine in 2023; and a 21.4 % export price increase to Bosnia and Herzegovina in 2023Price shocks. These episodes signal sudden cost pass-throughs, disrupted logistics, or abrupt demand shifts that can destabilise otherwise steady trade relationships.

## Conclusion

EU beer trade between 2015 and 2025 was shaped by a powerful interplay of volume compression, rising import costs, and profound geopolitical re-alignment. Exports lost both value and quantity, especially to the United States, while imports grew more expensive despite stable volumes, narrowing the traditional surplus. Partner geography was remade: the UK proved steady, Mexico and China expanded as suppliers, and Russia, Belarus, and the US retreated due to sanctions or market forces. Structurally, EU beer exports became less concentrated, relying on a wider range of buyers, while imports became more concentrated around the UK and Mexico. The specialisation divide among member states persisted, and high volatility in several partner markets exposed the sector to abrupt shocks. Together, these dynamics paint a picture of a mature export industry under pressure, yet one that is gradually diversifying its markets and adapting to a more fragmented and volatile global trading environment.

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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.