Market evolution: Beverages and spirits (CN 22) — 2015–2025

Introduction

Over the decade from 2015 to 2025, European Union external trade in beverages, spirits and vinegar (CN 22) expanded solidly on both the export and import fronts. Total extra-EU exports climbed from €27.7 billion to €35.7 billion (+28.8%), while imports advanced from €7.1 billion to €9.6 billion (+34.5%), lifting the trade surplus to €26.1 billion. Underneath the headline growth lie significant shifts in product mix, partner geography and pricing dynamics. This report identifies and interprets the main observable dynamics using the Trade Dashboard data.

Value growth outpaces volume as the EU’s beverage trade tilts toward premiumisation and a changing product mix

Overall export value expanded by 28.8% while volume grew only 8.2%, implying a broad upgrade in unit prices

Between 2015 and 2025 the average export price for the whole product group rose from €1,889 to €2,253 per tonne (+19.2%). Although there was a strong volume recovery in 2021–2022, the long-term trend shows value gains outstripping tonnages by a factor of more than three. Import prices, in contrast, increased by only 7.7%, pointing to a different composition and pricing power on the two sides of the balance.

Flow	Metric	2015	2025	Change (%)
Exports	Value (€ bn)	27.69	35.66	+28.8
Exports	Quantity (Mn tonnes)	14.64	15.83	+8.2
Exports	Unit price (€/t)	1,889	2,253	+19.2
Imports	Value (€ bn)	7.13	9.60	+34.5
Imports	Quantity (Mn tonnes)	5.66	7.10	+25.4
Imports	Unit price (€/t)	1,254	1,351	+7.7

Source: General Overview.

Wine and spirits remained the value anchors, but non-alcoholic beverages and waters posted the strongest growth rates

Wine of fresh grapes (CN 2204) is still the biggest export segment at €15.9 billion in 2025, up from €12.0 billion, entirely driven by a 39.8% price increase while volumes actually shrank by 5.3%. Spirits (CN 2208) generated €8.3 billion (+30.5%) thanks to a 47.5% volume jump, although its unit price fell by 11.5%, reflecting a different product mix within the category. The standout growth stories are non-alcoholic beverages (CN 2202), which rose 60.6% to €5.6 billion, and waters (CN 2201), up 58.9% to €1.5 billion, both showing strong volume and price increases.

CN code	Segment	Export value 2015 (€ bn)	Export value 2025 (€ bn)	Value change (%)	Volume change (%)	Price change (%)
2204	Wine	12.01	15.89	+32.3	-5.3	+39.8
2208	Spirits	6.37	8.31	+30.5	+47.5	-11.5
2202	Non-alcoholic beverages	3.47	5.57	+60.6	+51.3	+6.1
2203	Beer	3.41	3.00	-12.0	-16.6	+5.5
2201	Waters	0.93	1.48	+58.9	+9.9	+44.7
2207	Ethyl alcohol (>=80%)	0.56	0.36	-36.3	-54.6	+40.2
2206	Other fermented beverages	0.38	0.45	+18.3	-4.2	+23.5

Source: Product Segment Breakdown.

Import demand was heavily concentrated in spirits, non-alcoholic drinks and a booming ethyl alcohol trade

On the import side, spirits (CN 2208) and non-alcoholic beverages (CN 2202) each exceeded €1.8 billion by 2025, while ethyl alcohol (CN 2207) surged from €460 million to almost €1.28 billion (+177.8%). Wine imports contracted markedly in both volume (-37.3%) and value (-17.8%), indicating a substitution by other beverages and possibly a shrinking price-sensitive import segment.

Trade partners diversify markedly on both the import and export side, reducing concentration risks

The Herfindahl-Hirschman Index for exports fell by 19.6% and for imports by 25.3%, pointing to a more balanced partner structure

At the start of the period, the EU's export destinations were already relatively diversified; by 2025 the HHI dropped from 1,361 to 1,094. The import side saw an even more dramatic decline, from 2,322 to 1,734, driven largely by the emergence of new large suppliers. This structural widening of trade links is visible in the Partner Concentration dashboard.

On the export side, the United Kingdom and United States remain the largest markets, but Canada, Switzerland and Russia grew faster

The US and UK together still accounted for around 43% of extra-EU exports in 2025. Yet several smaller destinations recorded double-digit percentage gains: Switzerland (+44.2%), Canada (+37.6%) and Russia (+24.0%), albeit the latter with highly volatile quantities. Exports to China, in contrast, lost 10.1% over the decade and hit their lowest value in 2025 at €1.48 billion, down from a peak of €2.31 billion in 2021.

Partner	Export value 2015 (€ bn)	Export value 2025 (€ bn)	Change (%)
United Kingdom	5.67	6.60	+16.4
United States	7.75	8.68	+12.0
Switzerland	1.47	2.12	+44.2
China	1.64	1.48	-10.1
Russian Federation	0.95	1.17	+24.0
Canada	1.26	1.73	+37.6
Japan	1.04	1.19	+15.2

Source: Top Partners – Exports.

Import sourcing changed dramatically, with the United States, Pakistan and Serbia recording exceptional growth

EU imports from the United States almost doubled (+98.1%), reaching nearly €2.0 billion in 2025. Imports from Pakistan jumped 621.7% (albeit from a very low base) and from Serbia 265.5%, while traditional suppliers such as the United Kingdom and Switzerland grew only modestly. South African imports were essentially flat over the period despite a price spike in 2019.

Partner	Import value 2015 (€ mn)	Import value 2025 (€ mn)	Change (%)
United Kingdom	3,129	3,310	+5.8
United States	1,003	1,986	+98.1
Switzerland	597	652	+9.2
Türkiye	82	141	+71.6
South Africa	276	277	+0.4
Pakistan	20	143	+621.7
Serbia	43	158	+265.5

Source: Top Partners – Imports.

Price shocks and high volatility from emerging suppliers test supply-chain resilience

Several import origins experienced exceptional price and volume instability, notably Brazil, Ukraine and South Africa

The Volatility & Shocks module identifies the highest quantity variability on the import side for Brazil (CV 0.89), Ukraine (0.68) and Pakistan (0.66). These swings were often coupled with price shocks: Brazil's import price jumped 60.2% in 2022 (abnormality 12.8), while Ukrainian import prices rose 31.1% in 2022 in the aftermath of the full-scale invasion. South Africa witnessed a 19.9% import price surge in 2019, linked to a sharp volume contraction.

Export price shocks hit specific emerging and commodity-related destinations

On the export side, the United Arab Emirates recorded a 31.5% price spike in 2022, while a 19.9% price rise was observed in Brazil in 2023. Although these events affected only modest value shares (1.7% and 1.1% respectively), they illustrate the sensitivity of certain downstream markets to global logistic and currency disruptions.

Flow	Entity	Shock year	Price shift (%)	Abnormality	Value share (%)
Imports	Brazil	2022	+60.2	12.8	1.4
Imports	South Africa	2019	+19.9	10.4	4.0
Imports	Ukraine	2022	+31.1	6.9	1.2
Exports	Brazil	2023	+19.9	8.7	1.1
Exports	UAE	2022	+31.5	7.1	1.7

Source: Supply and Price Shocks.

Intra-EU specialisation remains anchored in France, Italy and Austria, providing a stable exporting core

In 2025, the most specialised member-state reporters in beverages were France (RSCA 0.3615), Austria (0.2739) and Italy (0.2654), all with revealed comparative advantage figures well above 1. These three countries account for about 36% of total EU beverages exports. Meanwhile, several Central and Eastern European countries show negative specialisation scores (Slovenia -0.482, Romania -0.427, Slovakia -0.419), indicating their export baskets are skewed away from this chapter. The large gap between the top and bottom of the distribution has remained broadly unchanged, underscoring the continued dominance of traditional wine-and-spirits-producing nations in extra-EU trade.

Conclusion

The decade to 2025 has reshaped EU trade in beverages and spirits along three primary axes. First, value growth has been powered by premiumisation, with wine and water prices climbing strongly while non-alcoholic drinks surged in both volume and value. Second, the partner landscape became more balanced: export concentration declined modestly and import concentration fell sharply as the United States, Pakistan and Serbia emerged as fast-growing sources. Third, the period was punctuated by acute price shocks in specific bilateral flows—most conspicuously Brazil, Ukraine and South Africa on the import side—highlighting the need for continued diversification and supply-chain monitoring. The traditionally specialised EU producers, led by France, Italy and Austria, have held on to their core position, but the dynamism is increasingly coming from product segments and partners that registered only modest shares a decade ago.

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