Market evolution: Books and brochures (CN 4901) — 2015–2025

Introduction

Between 2015 and 2025 the European Union's external trade in printed books, brochures and similar printed matter (CN 4901) underwent a quiet but deep transformation. While total trade values remained relatively stable, the composition of flows shifted dramatically toward higher unit prices and a more diversified set of partners. This report draws on the full annual series from the Trade Overview and other dashboard sections to describe and interpret the main dynamics.

1. Declining Tonnage, Rising Prices: The Volume-Value Paradox

Despite modest changes in trade values, physical shipments collapsed while unit values soared, reshaping the profitability and structure of the book trade.

Export value edged down 4.4% but export tonnage contracted by 38.8%

In 2015 the EU exported 268.6 thousand tonnes of books, compared to only 164.3 thousand tonnes in 2025. Over the same period export value moved from €1,783 million to €1,704 million (-4.4%). The average export price therefore leapt from €6,637/t to €10,337/t (+55.7%).

Import value rose slightly (+2.4%) while import quantity fell 19.4%

Import tonnage dropped from 203.3 thousand tonnes to 163.8 thousand tonnes, yet import value grew from €1,522 million to €1,558 million. The import unit price climbed from €7,486/t to €9,508/t (+27.0%).

The trade surplus shrank by 44.0%

The asymmetric erosion of net exports reduced the EU surplus from €261.5 million in 2015 to €146.5 million in 2025. The dwindling surplus reflects a narrowing competitiveness edge, especially in lower-value segments.

Indicator	2015	2025	Change (%)
Export value (€)	1,783,264,275	1,704,268,203	-4.4
Export quantity (t)	268,631	164,345	-38.8
Export unit price (€/t)	6,637	10,337	+55.7
Import value (€)	1,521,779,751	1,557,790,600	+2.4
Import quantity (t)	203,287	163,841	-19.4
Import unit price (€/t)	7,486	9,508	+27.0
Trade balance (€)	261,484,524	146,477,603	-44.0

Source: Trade Overview

2. Geopolitical Shocks and Rebalancing of Trade Partners

The decade’s partner landscape was redrawn by Brexit, pandemic-era logistics crises and long-run competitive shifts, with deep supply-chain disruptions revealed by price shock events.

The United Kingdom’s role as the dominant partner faded after Brexit

The UK remained the largest import source and export destination, but its trade contracted heavily. EU imports from the UK fell from €767.2 million to €539.7 million (-29.7%), while exports to the UK declined from €419.1 million to €305.7 million (-27.1%). A severe price shock struck UK imports in 2021: the unit price jumped 77.5% above the pre-shock baseline as tonnage plummeted to 40.8% of its previous level (see Shock Events). This reflects new customs frictions and a structural shift away from low-value book consignments.

China and the United States strengthened as strategic trade partners

Imports from China grew 34.2% (€272.6 million to €366.0 million), while imports from the United States rose 33.7% (€176.9 million to €236.5 million). On the export side, sales to the US surged 54.6% (€172.5 million to €266.8 million), making the US a near equal of traditionally large European partners. China’s import prices also registered a permanent 32.2% shock in 2021, indicating a higher-value product mix.

Partner (Imports)	2015 (€)	2025 (€)	Change (%)
United Kingdom	767,202,086	539,669,491	-29.7
China	272,649,646	365,993,691	+34.2
United States	176,933,247	236,486,734	+33.7
Bosnia and Herzegovina	11,646,385	29,430,994	+152.7
India	9,617,926	23,688,863	+146.3

Partner (Exports)	2015 (€)	2025 (€)	Change (%)
United Kingdom	419,120,369	305,718,167	-27.1
Switzerland	411,113,002	388,050,917	-5.6
United States	172,543,564	266,766,478	+54.6
Canada	83,620,104	97,039,171	+16.0
Mexico	71,523,711	78,840,842	+10.2

Source: Partners

Price shocks exposed fragile supply chains

Beyond the UK case, the shock detection algorithm identified three additional price events. Chinese import prices jumped 32.2% in 2021; Bosnian imports spiked 27.9% in 2022. On the export side, Morocco experienced a 97.8% price surge in 2021, while volume fell to 41.5% of baseline—likely a result of freight bottlenecks and a tilt toward higher-value orders (see Shock Events).

Import source diversification increased markedly

The Herfindahl-Hirschman Index for import values dropped from 3,048 to 2,110 (-30.8%), revealing a much broader supplier base. Export concentration in value terms declined only modestly (HHI from 1,276 to 1,187, -7.0%), but export *volume* concentration fell sharply (-39.0%), meaning that heavy tonnage now reaches a much wider range of destinations (see Concentration).

3. A Polarised EU: Specialisation and the Rise of New Export Hubs

Within the Union, comparative advantage in book trade became more polarised, with a distinct group of member states consolidating their position as specialised exporters.

Eastern and Baltic member states emerged as the most specialised exporters

In 2025 the highest revealed symmetric comparative advantage (RSCA) belonged to Latvia (0.7009), Poland (0.4018), Czechia (0.2463), Lithuania (0.2035) and France (0.1969) (see Most Specialised Reporters). Latvia, with an RCA of 5.69, and Poland (RCA 2.34) have developed robust printing clusters that serve both intra- and extra-EU demand.

Germany’s dominance eroded while Italy, Belgium and the Netherlands expanded

Germany’s exports fell 16.6% (from €552.0 million to €460.2 million) and its imports dropped 32.8%. Conversely, Italy’s exports grew 45.6% (€157.6 million to €229.5 million), Belgium’s more than doubled (+110.0%, from €40.6 million to €85.2 million) and the Netherlands’ exports rose 23.6% (€55.4 million to €68.5 million). On the import side, France recorded a 59.3% increase (€236.5 million to €376.7 million), possibly reflecting logistics and distribution hub effects (see Reporters).

EU Reporter (Exports)	2015 (€)	2025 (€)	Change (%)
Germany	551,978,838	460,174,660	-16.6
France	362,443,588	308,237,375	-15.0
Spain	249,836,875	258,425,038	+3.4
Italy	157,644,892	229,503,217	+45.6
Poland	54,545,148	46,188,497	-15.3
Netherlands	55,445,653	68,517,194	+23.6
Belgium	40,587,672	85,229,211	+110.0

Source: Reporters

A broader geographical footprint for export tonnage

Although export value concentration barely changed, volume HHI dropped from 2,149 to 1,311 (-39.0%) (see Concentration). This suggests that the new generation of specialised printers in Central and Eastern Europe is shipping heavy consignments to an increasingly diverse set of overseas markets.

Conclusion

The 2015-2025 period redefined EU external book trade. Total values stayed stable but masked a dramatic drop in physical volumes and a broad surge in unit prices. The United Kingdom’s post-Brexit retreat, accelerating import gains by China and the United States, and a series of supply-side price shocks reshuffled the partner hierarchy. Inside the Union, comparative advantage concentrated in Eastern and Baltic member states, while traditional heavyweights such as Germany lost ground. A more diversified import base and a wider dispersal of export tonnage point to an adaptive, although more fragmented, market. Overall, the EU book trade consolidated its resilience by moving up the value chain, deepening specialisation and spreading its international reach.

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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.