Market evolution: Ceramic products (CN 69) — 2015–2025

Introduction

The EU’s external trade in ceramic products (CN 69) has undergone a profound transformation over the decade 2015–2025. While the Union remains a solid net exporter, the underlying currents are marked by a sharp decoupling of values and volumes, significant repositioning of trading partners, and an ever-greater orientation towards foreign markets. This report disentangles these dynamics using the complete annual data set provided.

Section 1 – A tale of two dynamics: soaring values despite shrinking volumes

The headline trade figures reveal a striking divergence between value growth and physical tonnage, both in exports and in domestic production.

Export values climbed by nearly 18 %, yet the number of tonnes shipped fell by a quarter

Between 2015 and 2025, extra-EU exports rose from **€7.79 billion** to **€9.17 billion** (+17.8 %). Simultaneously, the volume of exports dropped from **12.3 million tonnes** to **9.2 million tonnes** (–25.2 %). The implied average export price therefore jumped from **€633** to **€997 per tonne** (+57.5 %).
Trade Overview

Imports expanded in both value and volume, with only a modest price decline

Imports grew much faster in value terms (+62.4 %, from **€2.98 billion** to **€4.83 billion**) while the imported quantity increased by 74.4 % (**2.38 million tonnes** to **4.15 million tonnes**). Average import prices softened slightly, from **€1 251** to **€1 165 per tonne** (–6.9 %), indicating that a large part of the import growth was driven by relatively cheaper product categories.
Trade Overview

Domestic production underwent a dramatic structural shift towards high-value ceramics

EU production quantity – measured in units – collapsed from **16.7 billion** (2003) to **5.7 billion** (2024), a decline of 65.7 %. Over the same interval, the total production value rose by 69.8 %, from **€15.0 billion** to **€25.5 billion**. The unit price consequently quintupled (from **€0.90** to **€4.44**), signalling a wholesale move away from basic clay building materials and towards higher-value technical ceramics, tiles, and sanitary-ware.

Production Volumes

Indicator	2015	2025	Change
Extra-EU exports (€ bn)	7.79	9.17	+17.8 %
Extra-EU exports (mn t)	12.31	9.21	–25.2 %
Export unit value (€/t)	633	997	+57.5 %
Extra-EU imports (€ bn)	2.98	4.83	+62.4 %
Extra-EU imports (mn t)	2.38	4.15	+74.4 %
Import unit value (€/t)	1 251	1 165	–6.9 %
Trade balance (€ bn)	4.81	4.34	–9.8 %

Section 2 – Shifting trade partners: China deepens its dominance, while Russia fades amidst geopolitical shocks

The composition of both import and export markets evolved substantially, reflecting changing competitiveness, geopolitical disruptions, and sharp price shocks.

China tightened its grip on EU ceramic imports; India and Türkiye posted massive gains

Extra-EU imports remain highly concentrated (HHI ≈ 2 435 in 2025, up from 2 047). China alone supplied **€2.24 billion** worth of ceramics in 2025, 82.6 % more than in 2015. Imports from India surged by 467.5 % to **€361 million**, while Türkiye (+61.5 %) and Serbia (+199.8 %) also grew sharply.

Top Partners

Import partner	2015 (€ mn)	2025 (€ mn)	Change
China	1 226	2 238	+82.6 %
Türkiye	318	514	+61.5 %
India	64	361	+467.5 %
Serbia	26	78	+199.8 %
Ukraine	19	61	+229.1 %

Export performance was reshaped by US demand growth and the collapse of the Russian market

On the export side, the United States became the largest single destination (**€1.86 billion**, +61.0 %), while shipments to the United Kingdom contracted (–9.8 %). Exports to the Russian Federation plummeted by 64.6 % (from **€446 million** to **€158 million**) following sanctions and trade restrictions. Markets such as Israel (+78.8 %), Morocco (+83.4 %), and Switzerland (+27.9 %) partially offset the losses.

Top Partners

Export partner	2015 (€ mn)	2025 (€ mn)	Change
United States	1 157	1 862	+61.0 %
United Kingdom	1 107	999	–9.8 %
Switzerland	410	524	+27.9 %
Israel	180	321	+78.8 %
Morocco	111	203	+83.4 %
Saudi Arabia	331	169	–48.9 %
Russian Federation	446	158	–64.6 %

Price shocks exposed vulnerabilities in both import supply chains and export markets

The data detect several abnormal price movements.

Volatility & Shocks

- **Ukraine imports (2022):** a 52.6 % price surge and a collapse in volume to 45 % of the baseline, directly linked to the war.
- **United Arab Emirates imports (2019):** an extreme price shift (+235.9 %) with a corresponding quantity plunge, pointing to a compositional or supply disruption.
- **United Kingdom exports (2017):** a 47.3 % price jump accompanied by a sharp volume drop, likely reflecting Brexit-related uncertainty and sterling depreciation.
- **United States exports (2022):** a 40.7 % price increase, partly driven by strong dollar and post-pandemic demand, while quantities eased only slightly.

These events underscore the exposure of EU ceramic trade to geopolitical risks and exchange-rate fluctuations.

Section 3 – Deepening export orientation and rising trade intensity despite a broadly stable surplus

The EU ceramic sector became markedly more export-focused over the decade, with both export propensity and overall trade intensity nearly doubling.

Export propensity more than doubled, signalling a sector ever more reliant on foreign markets

The ratio of extra-EU exports to EU production (export propensity) rose from **16.6 %** in 2003 to **35.1 %** in 2024. Trade intensity (total trade relative to production plus imports) climbed from **24.2 %** to **45.0 %**. Consequently, the EU's net import reliance became more negative, moving from **–7.1 %** to **–20.6 %**, i.e. the Union's ceramic industry firmly strengthened its net exporter position.

Net Import Reliance Trade Intensity Export Propensity

Indicator	2003	2024	Change
Export propensity	16.6 %	35.1 %	+111.1 %
Trade intensity	24.2 %	45.0 %	+86.2 %
Net import reliance	–7.1 %	–20.6 %	more negative

Southern EU members retained a strong competitive advantage in ceramic specialisation

In 2025, Portugal (RSCA 0.55), Italy (0.47), Spain (0.45), Bulgaria (0.38), and Poland (0.19) were the most specialised Member States in ceramic goods, with Italy and Spain together accounting for more than one-third of total EU ceramic exports.

Specialisation

Import supply became more concentrated, partly offsetting the diversified export structure

The import Herfindahl-Hirschman Index (HHI) climbed from **2 047** to **2 435** (+19 %), reflecting the growing weight of China. In contrast, export concentration remained moderate (HHI rising from 588 to 680), indicating that the EU's export markets are still well diversified. However, the rising reliance on a handful of Asian suppliers for key product segments (tiles, tableware) calls for monitoring.

Concentration

Conclusion

The decade 2015–2025 reshaped the EU’s ceramic product trade in fundamental ways. Exports grew in value despite falling tonnage, driven by a sustained shift towards higher-priced products – a phenomenon mirrored in domestic production, where unit values quintupled even as physical output halved. Imports, led by China, India and Türkiye, filled the gap in lower-cost segments, particularly ceramic tiles. Geopolitical developments redrew the trade map, with the Russian market collapsing and the US becoming the prime export destination, while price shocks reminded stakeholders of the sector’s exposure to external disruptions. The deepening export orientation, with export propensity now above one-third of production, underscores the ceramic industry’s integration into global value chains – a strength that also demands careful attention to supply-chain resilience and partner concentration.

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

Auto-generated report: it accelerates, and sometimes misleads, human analysis. It cannot replace it in full.

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.