EU TRADE EXPLORER

Market evolution: Chocolate and cocoa preparations (CN 1806) — 2015–2025

Introduction

Chocolate and other food preparations containing cocoa (CN 1806) represent one of the European Union's most dynamic and export-oriented food sectors. Over the period 2015–2025, EU trade in this category expanded far beyond what a simple tonnage increase would suggest. Export and import values more than doubled while quantities rose only moderately, revealing a powerful shift toward higher-value products and premiumisation. At the same time, the geography of suppliers diversified significantly, reducing concentration risks. This report draws exclusively on the data provided via the EU trade dashboard and interprets the main observable dynamics.

Export boom drives trade surplus to record levels

Export value nearly doubles while volume growth stays in the single digits

Between 2015 and 2025, the EU's extra-EU exports of CN 1806 jumped from EUR 5.4 billion to EUR 10.5 billion, a rise of **95.1 %** (Overview of trade). In the same period, the volume of exports increased by only **16.9 %** (from 1 040 686 to 1 216 233 tonnes). This stark divergence already signals that value growth was driven predominantly by price rather than by pure expansion of physical shipments.

Indicator	2015	2025	Change (%)
Export value (EUR)	5 383 607 273	10 502 656 998	+95.1
Export quantity (t)	1 040 686	1 216 233	+16.9
Import value (EUR)	1 262 745 367	2 627 627 920	+108.1
Import quantity (t)	250 539	309 768	+23.6

Unit value appreciation reflects product upgrading and rising input costs

The average export unit value rose from EUR 5 173 to EUR 8 635 per tonne, a **66.9 %** increase. Import unit values followed a similar trajectory, climbing **68.3 %** (from EUR 5 040 to EUR 8 483 per tonne). This sustained appreciation, especially after 2021, mirrors the global surge in cocoa prices and, importantly, a compositional shift toward higher-value, more elaborate chocolate preparations.

The trade surplus expands by 91 %, consolidating the EU as a global chocolate powerhouse

The EU's trade surplus grew from EUR 4.1 billion in 2015 to EUR 7.9 billion in 2025 (+91.1 %), underscoring the bloc's competitive advantage in processed cocoa products. The net-import-reliance indicator fell from –7.9 % to –32.0 % (more negative), showing that the EU has deepened its position as a net exporter. Export propensity (extra-EU exports relative to production value) reached **31.7 %** by 2024, up from 10.6 % in 2015, confirming that foreign markets have become an increasingly important outlet for EU production.

Import sourcing undergoes widespread geographic diversification

Imports more than double, with a strong acceleration after 2021

EU imports of chocolate and cocoa preparations more than doubled in value terms, from EUR 1.26 billion to EUR 2.63 billion. While import quantities grew by **23.6 %**, the value increase of **108.1 %** highlights that the same premiumisation trend visible in exports is also reshaping imports. The growth impulse intensified sharply from 2022 onward, coinciding with higher cocoa prices and a re-routing of some supply chains.

Emerging suppliers from Côte d'Ivoire, Ukraine, Serbia and Türkiye capture market share

The composition of import suppliers changed dramatically. While the United Kingdom and Switzerland remain the top sources (EUR 822 million and EUR 632 million in 2025, respectively), their growth was relatively modest (+56.9 % and +36.7 % over the decade). In contrast, several new origins recorded explosive growth:

Import partner	2015 value (EUR)	2025 value (EUR)	Change (%)
Côte d'Ivoire	99 325 924	416 407 889	+319.2
Ukraine	16 008 009	146 591 450	+815.7
Türkiye	27 774 290	197 736 359	+611.9
Serbia	6 647 249	176 486 380	+2 555.0

Source: Top partners by value

Côte d'Ivoire, a major cocoa producer, is increasingly shipping processed chocolate preparations rather than just raw cocoa. Serbia and Ukraine have become important processing hubs for cost-competitive confectionery, while Türkiye has leveraged its geographic proximity and expanding manufacturing capacity.

Supplier concentration drops markedly, reducing vulnerability

The Herfindahl-Hirschman Index (HHI) for imports fell from **3 150 in 2015 to 1 952 in 2025** (–38.0 %), moving the import side from a moderately concentrated to a more competitive structure (Concentration – HHI). The export side remained far less concentrated, with the HHI drifting down only slightly (–8.5 %). This diversification of import sources reduces the EU's exposure to single-country supply disruptions and reflects a broader trend of global chocolate manufacturing decentralisation.

Within-category dynamics reveal a clear push toward higher-value segments

Bulk chocolate (180620) registers the fastest unit value growth in both exports and imports

The sub-heading for chocolate in bulk form (>2 kg), industrial pastes and powders (180620) saw its average export unit value surge from EUR 3 417 to EUR 7 858 per tonne (+130 %). On the import side, the increase was even more pronounced: from EUR 3 370 to EUR 7 539 per tonne (+124 %). This partly reflects the pass-through of record cocoa bean prices, but also a move toward higher-cocoa-butter-content formulations used as semi-finished inputs for premium consumer products.

Filled bars and other consumer formats drive export value expansion

Finished consumer goods remained the backbone of EU exports. The largest export category, "other preparations in containers ≤ 2 kg" (180690), grew from EUR 3.0 billion to EUR 4.7 billion, yet its volume has stagnated since 2022. More dynamic was the filled-bar segment (180631), which nearly doubled in value despite a volume increase of only 32 %, lifting its unit value from EUR 4 576 to EUR 7 856 per tonne. Unfilled bars (180632) also posted strong unit value growth (from EUR 5 481 to EUR 9 708). These patterns indicate that EU exporters are increasingly positioning themselves in higher-quality, branded chocolate products.

Export sub-code	2015 unit value (EUR/t)	2025 unit value (EUR/t)	Change (%)
180690	5 921	8 983	+51.7
180631 (filled)	4 576	7 856	+71.7
180632 (unfilled)	5 481	9 708	+77.1
180620 (bulk)	3 417	7 858	+130.0

Source: Product segment breakdown

A broad-based upgrade lifts unit values across all sub-codes on both sides of trade

Import unit values also rose across the board. The smallest sub-category, sweetened cocoa powder (180610), saw import prices climb from EUR 3 458 to EUR 6 919 per tonne. Notably, import unit values for the main consumer-facing categories (180690, 180631, 180632) have moved closer to the corresponding export unit values, suggesting that the EU is importing higher-quality products than a decade ago, possibly for re-export or to satisfy diversified consumer demand.

Conclusion

The 2015–2025 period saw EU trade in chocolate and cocoa preparations evolve from stable, moderate growth into a high-value, premium-oriented market. Export and import values more than doubled, driven by strong unit value gains and a structural upgrade of the product mix. The EU’s trade surplus widened considerably, confirming the bloc’s global competitiveness. Meanwhile, a decisive diversification of import sources—with Côte d’Ivoire, Serbia, Ukraine and Türkiye as standout newcomers—has lowered supplier concentration and enhanced supply-chain resilience. Looking ahead, the sector’s ability to sustain profitability will depend on how it manages volatile cocoa input costs while maintaining the premium positioning that has been the hallmark of the past decade.

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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.