

Market evolution: Coal gas and similar gases (CN 2705) — 2015–2025

Introduction

EU external trade in coal gas, water gas, producer gas and similar gases (CN 2705) has undergone a sweeping transformation between 2015 and 2025. Once a flow of tens of thousands of tonnes worth millions of euros, it has shrunk to a mere trickle of high-value shipments. The trend is summarised by a near-total collapse in volumes and values, a staggering rise in unit prices, and a radical reconfiguration of both trading partners and the internal EU market. This report examines the main dynamics using annual figures from the trade dashboard.

1. From bulk volumes to negligible flows: the disappearance of EU coal gas trade

The overall trade in CN 2705 has essentially evaporated. Both exports and imports fell by over 98% in value while quantities approached zero, but unit prices skyrocketed, indicating a shift from a bulk industrial commodity to an extremely small-scale, high-value niche.

Export value and quantity plunged by more than 99%, with volumes falling from thousands of tonnes to just a few tonnes

EU exports started the period at €14.2 million and 56 755 tonnes, but by 2025 they had collapsed to only €29 381 and 3 tonnes. The recorded changes are –99.8 % in value and –100.0 % in quantity. The data are shown in the trade overview.

Year	Exports (€)	Exports (tonnes)
2015	14 216 692	56 755
2025	29 381	3.0

Import contraction was only slightly less dramatic, with a 98 % fall in value and 99 % in quantity

Imports dropped from €5.9 million and 25 255 tonnes in 2015 to €96 708 and 184 tonnes in 2025 (–98.4 % in value, –99.3 % in volume). Even the highest import year after 2015 (2019, with €3.66 million) is far below the initial level.

Year	Imports (€)	Imports (tonnes)
2015	5 890 384	25 255
2025	96 708	184

Unit values exploded, revealing a shift from bulk commodity to specialty gas

The average export price per tonne soared from €250 in 2015 to €9 658 in 2025 (+3 755.8 %). Import unit prices rose less dramatically but still more than doubled, from €233 to €527 (+125.8 %). Such price levels cannot represent ordinary industrial gases; they likely reflect small shipments of highly specialised or laboratory-grade gases.

Flow	2015 unit price (€/t)	2025 unit price (€/t)	Change (%)
Exports	250	9 658	+3 755.8
Imports	233	527	+125.8

As a result, the trade balance swung from a surplus of €8.3 million in 2015 to a deficit of €67 327 in 2025 (−100.8 %).

2. The unravelling of the UK-centric trade pattern and the resulting market structure shifts

The United Kingdom was the central hub for EU exchange of CN 2705 at the start of the period. Its near-disappearance as a major partner triggered extreme price shocks and profoundly altered the concentration of trade.

The United Kingdom's dominant role collapsed, triggering massive price shocks

In 2015 the UK supplied 93 % of EU imports (€5.47 million) and absorbed 99.7 % of EU exports (€14.17 million). By 2025, the UK remained the top partner but with drastically reduced values – just €95 587 on the import side and €12 751 on the export side. The top partners table illustrates the collapse.

Flow	Partner	2015 (€)	2025 (€)	Change (%)
Imports	United Kingdom	5 469 854	95 587	−98.3
Exports	United Kingdom	14 169 550	12 751	−99.9

This evaporation of volumes was accompanied by extreme price distortions. The dashboard's shock detection identifies two major events:

- **UK import price shock in 2020:** unit price jumped 2 014 % above the 2018-2019 baseline, reflecting a sudden switch to tiny, high-cost shipments.
- **UK export price shock in 2023:** unit price soared 460 % even as quantities fell to just a few kilograms.

Import concentration intensified while export destinations fragmented

Because the UK remained the only partner with any meaningful flow on the import side, the Herfindahl-Hirschman Index (HHI) for **imports** rose from 8 675 to 9 770 (+12.6 %). In contrast, the export concentration collapsed from 9 934 to 3 469 (–65.1 %), as exports, once overwhelmingly directed at the UK, were scattered across a diverse set of tiny buyers such as Norway, Cuba, the Faroe Islands and Cabo Verde.

Indicator	2015	2025	Change (%)
Import HHI	8 675	9 770	+12.6
Export HHI	9 934	3 469	–65.1

3. Inside the EU: the fall of Italian leadership and the rise of niche specialists

The geography of trade inside the EU mirrors the external transformation. A handful of Member States – above all Italy – once dominated, but their involvement has since collapsed, leaving a few specialised countries to handle what residual trade remains.

Italy's brief but massive activity vanished after 2019

In 2015 Italy was the largest EU importer (€5.4 million, virtually all from the UK) and by far the largest exporter (€14.2 million). According to the top EU reporters, after 2019 Italy recorded no further imports, and its exports fell to a few thousand euros. Other historically active reporters – Denmark, Sweden, Portugal – also saw their roles shrink to negligible levels.

Member State	2015 (€) – Imports	2025 (€) – Imports	2015 (€) – Exports	2025 (€) – Exports
Italy	5 432 397	—*	14 189 331	5 761
Denmark	418 784	169	4 288	1 602
Netherlands	9	379	12 711	16 937
Spain	n.d.	n.d.	1 249	9 716**

No imports recorded for Italy after 2019.

*Spain's export value to non-EU countries in 2025 is €9 716, but its 2024 value was €9 716 as well; note that 2025 data may be partial.

Current trade is sustained by a few highly specialised Member States

The specialisation map for 2025 shows that Estonia (RSCA 0.98) and the Netherlands (RSCA 0.63) are the only EU countries with a revealed comparative advantage in this product. The Netherlands now holds the largest share of EU trade in CN 2705 (63 % of the product's total EU-27 trade), even though the absolute amounts are tiny. All other major economies – Germany, France, Belgium, Poland – display strongly negative specialisation indices, confirming that this has become a marginal niche.

Member State	RSCA (2025)	Share of product in total EU-27 trade
Estonia	0.9815	36.2 %
Netherlands	0.6262	63.1 %
Germany	-0.9998	0.0 %
France	-0.9995	0.0 %

Conclusion

The EU's external trade in coal gas, water gas and similar gases has undergone a near-total collapse over the last decade. From a multi-million-euro exchange dominated by bulk shipments to and from the United Kingdom, the market has contracted to a handful of very small, high-price transactions. The dramatic rise in unit values points to a fundamental change in the nature of the product itself: it is no longer a standard industrial gas but rather a range of specialty or laboratory gases traded in minute quantities. The UK's withdrawal from this large-volume role triggered both a surge in price volatility and a fragmentation of export destinations. Inside the EU, the landscape shifted from Italian dominance to a constellation of tiny flows concentrated in the Netherlands and Estonia. Overall, CN 2705 trade has become a negligible residual of a once-meaningful industrial frontier.

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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.