EU TRADE EXPLORER

Market evolution: Coated paper (CN 4811) — 2015–2025

Introduction

Heading 4811 encompasses a wide range of coated, impregnated, surface-coloured or printed paper and paperboard (except goods of headings 4803, 4809 and 4810), including self-adhesive, gummed, plastics-coated and wax-coated grades. The European Union is a major global player in these products. Over the 2015–2025 period, extra-EU trade in CN 4811 has been shaped by two opposing forces: a substantial drop in exported and domestically produced volumes, and a sharp rise in unit values that preserved the bloc's export surplus. This report identifies and interprets the main dynamics, drawing exclusively on the official data set.

1. Price, not volume, keeps the EU's coated paper surplus intact

EU extra-EU exports barely gain in value as shipped tonnage shrinks by 15.6 %

Total exports of CN 4811 grew from €3 521 million to €3 746 million between 2015 and 2025, a modest increase of 6.4 % (EU trade overview). The value stability, however, masks a substantial volume contraction: export quantity fell from 1.68 million tonnes to 1.42 million tonnes (–15.6 %). Consequently, the average export price climbed 26 %, from €2 096 to €2 641 per tonne.

Table 1: Extra-EU trade aggregates, 2015 vs 2025

Indicator	2015	2025	Change (%)
Exports (€ million)	3 521	3 746	+6.4
Exports (tonnes)	1 679 879	1 418 208	–15.6
Export unit value (€/t)	2 096	2 641	+26.0
Imports (€ million)	823	1 182	+43.6
Imports (tonnes)	341 636	387 278	+13.4
Import unit value (€/t)	2 409	3 052	+26.7
Trade balance (€ million)	2 698	2 564	–5.0

Import demand expands considerably, yet the EU's net-exporter position deepens

Extra-EU imports rose from €823 million to €1 182 million (+43.6 %), driven more by price increases (+26.7 %) than by additional tonnage (+13.4 %). Despite the import surge, the trade balance remained heavily positive at €2 564 million in 2025, only 5 % below its 2015 level. The EU's net-import reliance ratio evolved from –43 % to –54 % (Net-import reliance), meaning the bloc became even more of a net supplier of coated papers to the rest of the world. Trade intensity and export propensity also increased slightly, confirming that external markets gained in relative importance for the EU industry (Trade intensity).

2. The geopolitical re-mapping of coated paper trade: Russia's exit and China's entry

Sanctions and war erase the once-largest export destination; Russia volumes collapse by 98.7 %

In 2015, the Russian Federation was the EU's second-largest export market for CN 4811, absorbing €411 million of shipments. Following the 2022 invasion of Ukraine, EU exports to Russia abruptly dried up, falling to €5.4 million in 2025 (–98.7 %) (Top trade partners). This supply shock represented a loss of roughly 10 % of total extra-EU export value, which the industry had to reabsorb elsewhere.

The United States and Türkiye become the main engines of export growth

The void left by Russia was partly filled by strong gains in other markets. Exports to the United States soared 64.0 % (from €347 million to €569 million), while Türkiye expanded by 64.4 % (to €368 million). India (+56.8 %), Japan (+37.8 %) and, albeit from a lower base, Mexico also posted solid increases. The United Kingdom, the largest single outlet, remained broadly stable at €614 million (+1.2 %), underlining the gradual recovery after the pandemic and Brexit-related adjustments.

Table 2: Top extra-EU export partners, 2015 vs 2025

Partner	2015 (€ million)	2025 (€ million)	Change (%)
United Kingdom	606.9	614.2	+1.2
United States	347.0	568.9	+64.0
Russian Federation	411.1	5.4	–98.7
Türkiye	223.7	367.8	+64.4
Japan	87.6	120.6	+37.8
India	57.4	90.0	+56.8
South Africa	121.0	91.9	–24.0

On the import side, China’s value surges 283 %, overtaking traditional suppliers

Extra-EU imports were reshaped even more dramatically. Chinese deliveries jumped 283 %, from €73 million to €278 million, making China the largest extra-EU supplier of CN 4811 by 2025. Other Asian partners also posted steep growth: Japan (+80.9 %), Korea (+86.7 %) and Türkiye (+154.6 %). Meanwhile, imports from the United States fell 17.6 %, and those from the United Kingdom edged down 2.0 %, underscoring a pivot towards lower-cost Asian producers.

Table 3: Top extra-EU import partners, 2015 vs 2025

Partner	2015 (€ million)	2025 (€ million)	Change (%)
United States	206.1	169.9	–17.6
Serbia	136.8	220.0	+60.8
United Kingdom	194.5	190.6	–2.0
China	72.6	278.0	+283.0
Korea, Republic of	20.8	38.8	+86.7
Japan	57.8	104.5	+80.9
Türkiye	20.5	52.1	+154.6

Overall, the import-side Herfindahl-Hirschman Index (HHI) fell from about 1 692 to 1 502, indicating a moderate diversification of sourcing (Concentration). Export-side HHI increased only slightly (from 677 to 718), confirming a relatively stable and diversified export portfolio.

3. Product segmentation and the 2022 price shock: moving up the value chain

Self-adhesive and gums-coated papers drive import growth; plastics-coated grades remain the backbone of exports

Breaking down the six-digit sub-headings reveals distinct dynamics (Product breakdown). The largest export category, *plastics-coated paper (excl. bleached >150 g/m²)* — code 481159 — maintained its lead with €1 448 million in 2025 (+26 %), even though its volume slipped from 451 872 tonnes to 421 606 tonnes. Its unit price rose from €2 538 to €3 435 per tonne. The *bleached, heavy plastics-coated grades* (481151) saw export value rise modestly, while *self-adhesive paper* (481141) exports contracted sharply in volume, though price increases protected value.

On the import side, *self-adhesive paper* (481141) stood out: import volume grew from 54 672 tonnes to 98 809 tonnes (+81 %), and value nearly doubled to €374 million. *Gummed or adhesive paper* (481149) and *other coated papers* (481190) also recorded robust gains. Tarred, bituminised or asphalted grades (481110) continued their structural decline, now representing negligible trade flows.

EU production volume contracts substantially, but rising unit values lift domestic output value

While extra-EU trade paints only part of the picture, domestic production data reinforce the shift towards higher unit values. EU production quantity of CN 4811 fell from 3 091 thousand tonnes in 2015 to 2 552 thousand tonnes in the latest available year (2024), a decline of 17.4 % (Production volumes). Over the same period, the value of EU production rose from €5.63 billion to €7.79 billion (+38 %), implying a steep increase in the average ex-factory price. This pattern mirrors the trade data and suggests that producers in leading Member States (notably Germany, Italy, Finland and Sweden) are concentrating on higher-value, specialised coated papers.

Price shocks in 2022 hit multiple export destinations, reflecting temporary supply-side turbulence

The year 2022 stands out as a period of exceptional price volatility (Supply-shock events). Export prices to Mexico surged 60.2 % above baseline, while those to Canada jumped 36 % and to the United States 34 %. Even exports to Ukraine experienced a 16 % price spike, as volumes were temporarily disrupted by the Russian invasion. On the import side, a similar pattern was observed for South Korea (+26.7 % price shift). These one-off shocks, which have partly receded, were linked to energy cost escalations, logistic bottlenecks and the general post-pandemic inflationary environment. The events temporarily inflated the already rising unit values, but the broader trend of structurally higher prices persisted through 2025.

Conclusion

From 2015 to 2025, the extra-EU trade in coated paper and paperboard (CN 4811) underwent a profound structural transformation. The EU maintained a large trade surplus, but that surplus became fully reliant on ever-higher unit values as exported volumes eroded. Geopolitically, the loss of the Russian export market was compensated by vigorous growth in the United States, Türkiye and other Asian destinations, while imports pivoted sharply towards China and other Asian suppliers. At the product level, self-adhesive and value-added coated grades gained prominence, and a steep drop in EU production tonnage was offset by a strong appreciation in output prices. With trade intensity rising and the net-export position deepening, the EU's coated paper industry appears increasingly specialised in higher-value niches—yet its dependence on price-driven growth renders it sensitive to future demand fluctuations and cost shocks.

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