Market evolution: Detergents (CN 3402) — 2015–2025

Introduction

This report analyses extra-EU trade of organic surface-active agents, washing and cleaning preparations (excluding soap and personal care, CN 3402) over the period 2015 to 2025. Covering both retail-ready and industrial formulations, the product group is a core chemical-consumer hybrid. The data reveal three central dynamics: strong value growth driven by rising unit prices rather than volumes; a profound reorientation of trade partners following geopolitical ruptures and diversification efforts; and a structural strengthening of the EU's production base that has made the bloc more self-sufficient and export-oriented.

Value Growth Outpaces Volume as Prices Climb Across the Decade

Extra-EU trade expanded markedly, but the value surge was overwhelmingly price-led

From 2015 to 2025 the EU's extra-EU exports of detergents rose from €4.33 billion to €6.34 billion (+46.5 %), while imports climbed from €1.50 billion to €2.51 billion (+67.1 %). In contrast, physical volumes barely moved: export tonnage grew by just 4.4 % (2.61 mt to 2.72 mt) and import tonnage by 24.7 % (0.91 mt to 1.14 mt). Consequently, the average export price jumped from €1,661/t to €2,331/t (+40.3 %) and the import price from €1,643/t to €2,202/t (+34.0 %), underscoring that value creation came from price appreciation rather than additional mass. Trade Overview

Indicator	2015	2025	Change
Exports (€ bn)	4.33	6.34	+46.5 %
Imports (€ bn)	1.50	2.51	+67.1 %
Trade balance (€ bn)	2.82	3.83	+35.5 %
Export quantity (kt)	2,605	2,719	+4.4 %
Import quantity (kt)	915	1,141	+24.7 %
Export unit price (€/t)	1,661	2,331	+40.3 %
Import unit price (€/t)	1,643	2,202	+34.0 %

The trade surplus widened and net import reliance deepened in favour of the EU

Because export values out-performed imports, the EU's trade surplus in detergents expanded from €2.82 billion to €3.83 billion. The net-import-reliance indicator (the share of apparent consumption met by net imports) fell from -13.2 % to -29.2 %, i.e. the EU became a substantially larger net exporter of these products. Net Import Reliance This improvement reflects both rising production and the shift toward higher-value export segments.

Geopolitical Shifts Redraw Trade Partners and Trigger Price Shocks

EU export destinations were reshaped by the decline of Russia and the rapid rise of Ukraine, China and Serbia

Among leading extra-EU export markets, the United Kingdom remained dominant (€1.53 billion in 2025, +37.5 %) while Switzerland grew steadily (+46.5 %). Most dramatic was the collapse of exports to Russia, down 42.7 % from €301 million to €173 million following the 2022 invasion of Ukraine and subsequent sanctions. In contrast, exports to Ukraine soared 192.4 % to €233 million, those to China rose 79.5 % to €345 million, and deliveries to Serbia jumped 113.3 % to €175 million. Top Export Partners

Export partner	2015 (€ m)	2025 (€ m)	Change
United Kingdom	1,114	1,532	+37.5 %
Switzerland	264	386	+46.5 %
China	192	345	+79.5 %
Ukraine	80	233	+192.4 %
Serbia	82	175	+113.3 %
Türkiye	297	411	+38.5 %
Russian Federation	301	173	-42.7 %

Import sources diversified considerably, with Serbia, China and Türkiye gaining share

On the import side, the United Kingdom remained the largest supplier (€896 million, +19.3 %), but its dominant share eroded. The import-partner concentration, measured by the Herfindahl-Hirschman Index (HHI), fell from 3 100 to 1 945 (–37.3 %). Gains were particularly sharp from Serbia (+718.9 % to €430 million), China (+455.0 % to €180 million) and Türkiye (+353.5 % to €151 million). Import Concentration HHI This broadening of sourcing reduces dependency on a single trade lane.

Import partner	2015 (€ m)	2025 (€ m)	Change
United Kingdom	751	896	+19.3 %
Serbia	53	430	+718.9 %
United States	333	381	+14.2 %
China	32	180	+455.0 %
Switzerland	118	160	+35.6 %
Türkiye	33	151	+353.5 %
Norway	59	68	+14.9 %

A cluster of price shocks in 2022 hit several export markets, reflecting supply-chain tensions

The year 2022 stands out as a moment of extreme price dislocation. Export unit prices to Türkiye jumped 34.7 % (abnormality score 737.4), to the United States 26.6 %, to Brazil 35.3 % and to Egypt 46.1 %, all far above baseline volatility. Price Shock Events These coincided with the post-pandemic surge in energy and logistics costs. Meanwhile, the highest volatility in import volumes was recorded for Ukraine (coefficient of variation 1.07) and China (0.50), reflecting supply disruptions and rapid ramp-ups. Volatility Bars By 2024-2025 many of these prices had partially retreated, but the episode permanently altered price expectations.

Production Capacity and Export Orientation Strengthen EU Competitiveness

EU production of detergents grew robustly, with output value rising faster than volume

EU member-state production data (Prodcom) shows a long-term expansion. From 2003 to 2024, production quantity increased from 10.8 million tonnes to 15.4 million tonnes (+43.5 %), while the value of production rose from €10.8 billion to €17.7 billion (+64.6 %). Production Volumes The faster value growth implies that producers moved into higher-priced formulations, consistent with the export price trend.

Export propensity nearly doubled, turning the sector into a globally-integrated activity

The share of production exported to non-EU destinations (export propensity) climbed from 19.8 % in 2006 to 35.7 % in 2024, an increase of 80.2 %. Trade intensity—the sum of exports and imports relative to production—rose from 25.9 % to 43.2 % over the same horizon. Export Propensity This deepening engagement with world markets is supported by a few highly specialised member states: in 2025 Luxembourg (RSCA 0.46), Belgium (0.31), Denmark (0.17), Greece (0.17) and Poland (0.13) show the strongest comparative advantage in detergents. Specialisation Map Germany and Italy, though large exporters, are less specialised relative to their overall trade.

Retail preparations and non-ionic surfactants dominate trade flows, with EU exports commanding a premium

A closer look at product sub-segments (2022-2025) shows that surface-active preparations put up for retail sale (3402 50) are the largest category in both directions. In 2025 they accounted for €3.07 billion of exports and €1.46 billion of imports. Non-retail preparations (3402 90) follow at €1.39 billion exports and €0.47 billion imports. Non-ionic surfactants (3402 42) are the highest-value intermediate, with an export unit price of €2,864/t and import price of €3,263/t, indicating that the EU ships competitive, high-quality products while also importing specialised grades. Product Segment Comparison

Sub-segment (CN 3402)	Export value 2025 (€ m)	Import value 2025 (€ m)	Export price (€/t)	Import price (€/t)
3402 50 (retail)	3,075	1,455	2,067	1,950
3402 90 (non-retail)	1,394	466	2,892	2,692
3402 42 (non-ionic)	1,109	294	2,864	3,263
3402 39 (anionic)	507	149	1,996	2,373

The combination of strong retail export performance, growing industrial surfactant shipments, and a widening price premium underlines the qualitative upgrading of the EU's detergent trade.

Conclusion

The decade to 2025 transformed EU trade in detergents from a largely volume-driven, UK-centric pattern into a more valuable, geographically diversified and internally resilient system. Prices rather than tonnage drove expansion, and the bloc's export surplus deepened, underpinned by expanding domestic production and rising export propensity. Geopolitical events – notably the war in Ukraine – accelerated partner diversification, with Serbia, China and Ukraine emerging as key outlets and sources, while price shocks in 2022 left a lasting mark on transaction values. Member-state specialisation and the shift toward higher-priced retail and surfactant segments suggest that the EU's competitive position in this sector is being steadily reinforced.

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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.