Market evolution: Edible fruit and nuts (CN 08) — 2015–2025

Introduction

Over the 2015–2025 period, the European Union's trade in edible fruit and nuts experienced a profound structural transformation. While extra-EU imports grew strongly in both value and volume, exports became ever more concentrated on high-value, lower-tonnage segments. The result is a rapidly widening trade deficit, a shift in sourcing and destination markets, and a growing external dependency for many fruit and nut products.

A Widening Trade Deficit Driven by Surging Import Volume and Value

- EU imports of edible fruit and nuts grew by **67.1%** in value, from **€16.5 billion** in 2015 to **€27.6 billion** in 2025, while the quantity imported rose by **38.7%** to **15.5 million tonnes**, driving up the average import price by **20.5%** (from €1,483 to €1,786 per tonne). Total EU trade flows
- Extra-EU exports, by contrast, recorded only a **20.3%** increase in value, reaching **€7.1 billion** in 2025, despite a **30.6%** drop in shipped tonnage (from 5.5 million tonnes to 3.8 million tonnes). Consequently, the average export unit price surged by **73.3%**, from €1,059 to €1,836 per tonne. Total EU trade flows
- The trade deficit nearly doubled, deepening by **92.8%** from **€10.7 billion** to **€20.6 billion**. Net import reliance climbed sharply from **28.2% in 2015** to **65.4% in 2024**, while trade intensity reached **77.9%**, underscoring the EU's growing dependence on foreign suppliers for this category. Net import reliance | Trade intensity

Indicator	2015	2025	Change (%)
Extra-EU imports (€ bn)	16.5	27.6	+67.1
Import quantity (mn t)	11.2	15.5	+38.7
Import unit price (€/t)	1,483	1,786	+20.5
Extra-EU exports (€ bn)	5.9	7.1	+20.3
Export quantity (mn t)	5.5	3.8	–30.6
Export unit price (€/t)	1,059	1,836	+73.3
Trade balance (€ bn)	–10.7	–20.6	–92.8
Net import reliance (%)	28.2	65.4[1]	—
Trade intensity (%)	54.9	77.9[1]	—

[1] Value for 2024.

The Shifting Geography of EU Fruit and Nut Trade: From Traditional Partners to Latin American Dominance

- EU imports from **Peru**, **South Africa**, and **Colombia** expanded explosively (by **318.4%**, **111.0%**, and **84.0%**, respectively), while shipments from the historically largest supplier, **Türkiye**, grew by only **4.3%**. Top import partners
- Import concentration (HHI) fell by **10.6%**, reflecting a wider sourcing base, yet a handful of Latin American and African countries—notably Peru, Ecuador, Colombia, Costa Rica, and South Africa—now account for a large share of EU imports. Import concentration (HHI)

Import partner	2015 (€ mn)	2025 (€ mn)	Change (%)
Peru	604	2,528	+318.4
South Africa	1,097	2,314	+111.0
Colombia	742	1,365	+84.0
Türkiye	1,878	1,959	+4.3
Ecuador	778	1,348	+73.4
Brazil	528	878	+66.3

- On the export side, the **United Kingdom** remained the top destination with broadly stable spending (**–1.8%**), while **Switzerland** (+67.5%), **Norway** (+41.4%), and **Ukraine** (+181.1%) gained importance. Exports to **Belarus** collapsed by **57.6%**, reflecting sanctions and political disruption. Top export partners

- Export destination diversification also increased (HHI down **21.5%**), though the **United Kingdom**, **Switzerland**, and **Norway** together still absorb a substantial portion of EU fruit and nut exports. Export concentration (HHI)

Export partner	2015 (€ mn)	2025 (€ mn)	Change (%)
United Kingdom	2,357	2,314	–1.8
Switzerland	677	1,134	+67.5
Norway	384	543	+41.4
Ukraine	80	225	+181.1
Belarus	368	156	–57.6
Brazil	117	195	+66.3

From Bulk to Premium: Export Specialisation and Segment Transformation

- The EU's export basket shifted markedly toward high-value segments: **fresh berries and other edible fruits (CN 0810)** saw unit prices jump **67%**, lifting their value by **59%** to **€1.76 billion**, while traditional **apples and pears (CN 0808)** suffered a **45%** volume drop, pushing unit prices up **80%** to maintain roughly stable value. Product segment comparison

Export segment (CN)	2015 value (€ mn)	2025 value (€ mn)	Price change (%)	Volume change (%)
Apples, pears (0808)	1,368	1,361	+80	–45
Berries, other (0810)	1,105	1,761	+67	–4
Citrus (0805)	843	886	+54	–32
Stone fruit (0809)	490	498	+141	–58
Tropical fruit (0804)	283	608	+19	+81
Grapes (0806)	408	482	+37	–14
Melons, papayas (0807)	161	284	+40	+25

- On the import side, **edible nuts (CN 0802)** remained the largest value category, reaching **€6.0 billion** in 2025, but the most dynamic growth came from **avocados, mangoes and other tropical fruit (CN 0804)**, which surged **150%** in value to **€4.6 billion**, and from **frozen fruit and nuts (CN 0811)**, up **121%** to **€1.8 billion**, reflecting changing European consumption patterns. Product segment comparison

Import segment (CN)	2015 value (€ mn)	2025 value (€ mn)	Price change (%)	Volume change (%)
Nuts (0802)	4,869	5,982	–19	+52
Bananas (0803)	2,726	3,753	+8	+27
Tropical fruit (0804)	1,849	4,631	+46	+72
Citrus (0805)	1,445	2,406	+27	+31
Grapes (0806)	1,337	2,097	+20	+31
Frozen fruit/nuts (0811)	795	1,760	+20	+84
Melons, papayas (0807)	426	818	+29	+49

- Specialisation in edible fruit and nuts within the EU remains strongly concentrated in the **southern Member States**: **Greece** (RSCA 0.69), **Spain** (0.66), **Portugal** (0.35), the **Netherlands** (0.31) and **Italy** (0.12) show a high revealed comparative advantage, while most northern and eastern countries are marginal producers. Specialisation map
- Among EU member states, **Poland** (+90.4%) and **Greece** (+73.9%) significantly expanded their export roles, while the **Netherlands** reinforced its dual position as the EU's leading import hub (+103.0% in imports) and the second-largest extra-EU exporter (+51.6%). Top importing reporters | Top exporting reporters

Member State	Export growth 2015–2025 (%)	Import growth 2015–2025 (%)
Poland	+90.4	+229.4
Greece	+73.9	—
Netherlands	+51.6	+103.0
Spain	+16.8	+113.3
Italy	+17.7	+55.8
Germany	+1.4	+31.8

Conclusion

The EU's trade in edible fruit and nuts over 2015–2025 is characterised by a sharply widening deficit, an accelerated diversification of import sources—especially towards Latin America—and a deliberate move up the value chain in exports. While southern EU countries have cemented their role as the bloc's fruit and nut specialists, overall external dependency has risen dramatically, leaving the sector increasingly exposed to global supply conditions and price volatility.

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.