Market evolution: Edible vegetables and roots (CN 07) — 2015–2025

Introduction

This report examines the evolution of EU trade in edible vegetables and certain roots and tubers (CN 07) with extra-EU partners from 2015 to 2025. It analyses patterns in total trade flows, partner- and member-state-level dynamics, price shocks and the structural shifts that have redefined the EU's position in this key agri-food sector. All figures are drawn from the Trade Dashboard.

1. A Growing Appetite for Extra-EU Vegetables: Import Surge Reshapes the Trade Balance

Import values nearly double as Southern and Eastern suppliers gain ground

Extra-EU imports of CN 07 soared from €3.8 billion in 2015 to €6.7 billion in 2025, a 79 % rise. Three partners stood out: Egypt (+224.6 %), Türkiye (+221.5 %) and Morocco (+107.1 %). China remained a major supplier, expanding by 56.5 %. The table below summarises the shift in import values among the top partners.

Partner	2015 (€ bn)	2025 (€ bn)	Change (%)
Morocco	0.815	1.688	+107.1
Egypt	0.238	0.774	+224.6
Türkiye	0.240	0.771	+221.5
China	0.470	0.736	+56.5
United States	0.225	0.257	+13.9

Source: Top partners by value

Volume growth outpaces prices but unit values still climb

Imports in volume terms rose by 56.3 %, from 3.4 million tonnes to 5.3 million tonnes. Average import prices moved up moderately (14.6 %), suggesting that the bulk of the value expansion came from larger physical flows rather than pure price inflation. However, unit price increases accelerated in 2022–2023, driven by the post-pandemic commodity cycle and weather-related supply constraints.

The trade balance collapses by over 60 %, turning a large surplus into a narrow margin

EU exports of CN 07 grew from €5.3 billion to €7.3 billion (+37.8 %), while export volumes actually contracted by 5.0 %, indicating robust price gains (+45.0 %). Because imports grew much faster, the trade surplus shrank from €1.54 billion to only €0.57 billion, a drop of 62.9 %. Net import reliance, although still negative (EU remains a net exporter), moved from a low of -1.7 % in 2025 from +1.9 % in 2015, reflecting the eroding surplus.

Indicator	2015	2025	Change (%)
Exports (€ bn)	5.29	7.29	+37.8
Imports (€ bn)	3.75	6.72	+79.1
Trade balance (€ bn)	1.54	0.57	-62.9
Export price (€/t)	802.27	1163.48	+45.0
Import price (€/t)	1107.22	1269.22	+14.6

Source: Overview dashboard

Concentration risks rise as HHI for imports increases by 22 %

The Herfindahl-Hirschman Index (HHI) for imports rose from 904 to 1102, indicating a moderate but clear increase in supplier concentration. Morocco alone now accounts for roughly a quarter of extra-EU imports. Such concentration exposes the EU to climatic or geopolitical risks in a single country. Export concentration remained stable (HHI hovering around 2500), with the United Kingdom still the dominant destination.

Source: Concentration HHI

2. Stable Export Engines and Shifting Destination Patterns

The United Kingdom remains the unrivaled top customer despite Brexit

The UK absorbed €3.49 billion of EU vegetable exports in 2025, up from €2.57 billion in 2015 (+35.8 %). It consistently represented over 45 % of total extra-EU export value, underscoring the strong, seasonally complementary trade relationship that survived the institutional separation.

Partner	2015 (€ bn)	2025 (€ bn)	Change (%)
United Kingdom	2.57	3.49	+35.8
Switzerland	0.41	0.71	+72.9
United States	0.26	0.40	+56.7
Norway	0.28	0.39	+36.6
Côte d'Ivoire	0.032	0.090	+182.9
Senegal	0.070	0.106	+50.6

Source: Top partners by value – exports

Spain and the Netherlands consolidate their position as EU export powerhouses

Among member states, the Netherlands and Spain dominated extra-EU exports. Spain's exports soared by 72.8 %, reaching €2.07 billion, while the Netherlands, already the top exporter, grew by 18.3 % to €2.44 billion. Poland (+82.7 % to €0.44 billion) and Belgium (+47.0 % to €0.56 billion) also expanded rapidly. The specialisation map for 2025 shows Spain (RSCA 0.66) and the Netherlands (RSCA 0.28) as the most specialised exporters.

Member State	2015 (€ bn)	2025 (€ bn)	Change (%)
Netherlands	2.06	2.44	+18.3
Spain	1.20	2.07	+72.8
France	0.48	0.53	+10.3
Belgium	0.38	0.56	+47.0
Poland	0.24	0.44	+82.7
Italy	0.24	0.38	+60.8

Source: Top reporters by value

African and North American markets drive diversification

Exports to Côte d'Ivoire (+182.9 %), Senegal (+50.6 %) and the United States (+56.7 %) grew well above the overall export trend, reducing the relative reliance on the UK. The value of trade with Egypt, however, contracted by 12.8 %, illustrating the volatility of some developing-country markets.

3. Price Shocks and Volatility in a Tightening Market

Multiple price shocks hit key partners, straining import costs

The data reveals several significant price shocks in imports. Turkish, Canadian, Israeli and Ukrainian import prices experienced abnormal accelerations. For instance, Turkish prices surged by 27.5 % in 2022, combined with a 15.6 % volume increase, lifting the value share of that partner to 13.1 %. Canadian prices spiked by 47.7 % in 2022 while volumes dropped, indicating a severe supply contraction. Ukraine saw a price shock of 107.6 % in 2022, linked to the war-induced disruption of Black Sea logistics.

Shock event (imports)	Center year	Price shift (%)	Abnormality	Value share (%)
Türkiye	2022	+27.5	9.1	13.1
Israel	2023	+26.9	8.8	2.8
Canada	2022	+47.7	8.3	5.0
Ukraine	2022	+107.6	4.6	1.2

Source: Shock events

Export prices soar across the board, especially for frozen and fresh produce

On the export side, unit prices rose sharply in all major segments. For example, export prices of frozen vegetables (CN 0710) jumped from €937 /t in 2015 to €1391 /t in 2025, an increase of 48.4 %. Fresh tomatoes (CN 0702) became 68.7 % more expensive, reaching €2053 /t. These price hikes reflect higher input costs, strong demand and the EU's move towards higher-value products. A notable price shock hit Senegalese exports in 2022, with an abnormality of 28.9 and a price shift of +65.3 %, driven by supply tightness in certain vegetable categories.

Segment (export)	2015 price (€/t)	2025 price (€/t)	Change (%)
Frozen vegetables (0710)	937.44	1390.86	+48.4
Fresh tomatoes (0702)	1216.61	2053.32	+68.7
Other fresh vegetables (0709)	1710.39	2408.46	+40.8
Potatoes, fresh (0701)	369.94	528.71	+42.9

Source: Product segment breakdown

Rising import reliance in specific segments raises food supply vulnerability

While the EU remains a net exporter overall, the erosion of the surplus and the concentration of imports on a few Mediterranean countries create pockets of vulnerability. The net import reliance indicator, though still negative at -1.7 % in 2024, has moved upward from its lowest point of -3.3 % in 2020. This trend, coupled with price volatility in imported segments such as dried legumes and tomatoes, suggests that the EU will need to monitor supplier diversification closely. The high volatility in flows from Russia (coefficient of variation of 0.98) and Ukraine (0.84 on imports, 0.78 on exports) further underlines the risks in these channels.

Source: Net import reliance and Volatility bars

Conclusion

Between 2015 and 2025, EU trade in edible vegetables and roots underwent a profound transformation: imports nearly doubled, while export growth relied almost entirely on price increases, causing the trade surplus to shrink dramatically. The United Kingdom remained the linchpin of EU exports, but the emergence of African and American destinations added diversity. At the same time, import concentration increased, and a series of price shocks from key suppliers highlighted the fragility of external sourcing. The EU’s net exporter position, though intact, is now thinner than at any point in the last decade, warranting close attention to market diversification and supply-chain resilience.

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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.