Market evolution: Food industry residues and animal feed (CN 23) — 2015–2025

Introduction

This report examines the evolution of European Union trade in Chapter 23 goods — residues and waste from the food industries, and prepared animal fodder — with non-EU partners over the period 2015 to 2025. Using the official EU trade dashboard data, we describe the main developments in flows, partners, product composition, market structure and volatility. Three major dynamics stand out: a robust export performance driven by high-value products that has sharply narrowed the trade deficit; a profound reorientation of import and export partners in response to geopolitical shocks; and a gradual diversification of both source countries and destination markets, mirrored in falling concentration indices across the EU.

1. Booming exports of high-value animal feed sharply reduce the trade deficit

Exports of CN 23 products grew much faster than imports over the last decade, mainly due to a strong increase in unit prices for processed animal feed, while import volumes for bulk oilcakes remained largely stable.

Export value surged by 71.6%, led by price increases and a shift toward premium prepared feed

Total extra-EU export value rose from €5.79 billion in 2015 to €9.94 billion in 2025 (+71.6%), while the volume grew only 14.6%.

This reflects a steep rise in the average unit price, from €715 to €1 070 per tonne (+49.8%).

The main export product is **prepared animal feed (2309)**, which alone accounted for €8.07 billion in 2025, up from €4.04 billion in 2015. Its unit price climbed from €1 188 to €1 802 per tonne, underscoring the high-value nature of EU exports.

Detailed product-level data are available in the Product Segment Breakdown.

Export product	Value 2015 (bn €)	Value 2025 (bn €)	Price 2015 (€/t)	Price 2025 (€/t)
2309 – Prepared animal feed	4.04	8.07	1 188	1 802
2306 – Other oilcakes	0.28	0.40	217	274
2301 – Flours, meals & pellets	0.67	0.86	642	592

Import values rose only 12.5%, with volumes up 7.4% and a modest price increase of 4.7%

Imports reached €11.86 billion in 2025, against €10.54 billion ten years earlier.

Quantities moved from 28.9 million tonnes to 31.1 million tonnes, while the average import price grew from €364 to €382 per tonne.

The import basket is dominated by **soya-bean oilcake (2304)**: 20.9 million tonnes worth €6.93 billion in 2025, although its price fell back to €332 per tonne after a temporary spike in 2022–2023.

The combination of booming exports and slower-growing imports turned the trade deficit from –€4.75 billion to –€1.92 billion, a reduction of 59.7%.

The overall picture is visible in the General Overview.

2. Geopolitical shocks and diversification reshape trade partnerships

The period witnessed a dramatic realignment of both import sources and export destinations. Russia's role collapsed, Ukraine maintained a resilient supply, and the EU's export markets grew significantly more diversified.

Imports: Brazil stays on top, Argentina declines, Russia vanishes, Ukraine grows

The top-7 extra-EU import partners are listed in the Top Partners section.

- **Brazil** remained the leading supplier, with imports rising from €3.01 billion to €3.60 billion (+19.5%), though subject to sharp price surges in 2022–2023 (peak unit price €510.56/t).
- **Argentina**, the second supplier, saw its value drop by 13.6% (from €3.00 billion to €2.60 billion), with a notable volume dip in 2023.
- **Ukraine** increased its deliveries by 74.3%, reaching €0.80 billion in 2025, despite wartime disruptions. A temporary price shock in 2021 (unit price up 33.3%) was quickly absorbed, and volumes returned to pre-war levels.

- **Russia** collapsed by 94.0%: from €0.42 billion (1.78 million tonnes) in 2015 to only €25 million (0.21 million tonnes) in 2025, reflecting sanctions and trade disruption after 2022.
- The **United States** fell by 41.1% to €0.45 billion, partly price-driven.
- The **United Kingdom** (originally an intra-EU partner; data are extra-EU) shows stable EU import levels around €0.87 billion.

Partner	Import value 2015 (bn €)	Import value 2025 (bn €)	Change
Brazil	3.01	3.60	+19.5%
Argentina	3.00	2.60	–13.6%
Ukraine	0.46	0.80	+74.3%
Russia	0.42	0.025	–94.0%
United States	0.76	0.45	–41.1%

These shifts contributed to a 12.3% drop in the import HHI concentration index (from 1 820 to 1 596), as shown in the Concentration & Specialisation panel.

Exports: European animal feed finds new buyers far beyond the UK

EU exports became markedly less concentrated: the HHI for export partners fell by 20.4% (from 926 to 737).
The **United Kingdom** remains the largest customer (€2.27 billion in 2025, +47.3%), but its share is gradually diluted.
Other major destinations grew far more strongly:

- **Türkiye**: +105.4% to €0.44 billion
- **Norway**: +97.4% to €0.72 billion
- **Switzerland**: +111.1% to €0.58 billion
- **Israel**: +117.4% to €0.22 billion

These data are drawn from the Top Partners – exports.

Exports to **China** were highly volatile (CV 0.83), surging in 2021–2023 on the back of short-term demand, while shipments to **Russia** fell dramatically (from 394 thousand tonnes in 2015 to 86 thousand tonnes in 2025) after EU sanctions cut off many feed exports. Details on volatility are provided in the Volatility & Shocks section.

3. Market structure: EU member states specialise and diversify the supply chain

The distribution of trade among EU countries reveals a gradual shift away from a few dominant players, accompanied by emerging specialisation in Central and Eastern Europe.

Import concentration among EU members falls while new actors increase their share

Among the top EU importers (extra-EU), several countries recorded substantial growth:

- **Poland** increased import value by 63.7% (€0.85 billion to €1.40 billion)
- **Ireland** grew by 47.8% (€0.62 billion to €0.92 billion)
- **Spain** rose by 32.1% (€1.12 billion to €1.48 billion)

In contrast, the **Netherlands**, traditionally the largest importer, saw a decline of 17.3% (from €1.94 billion to €1.60 billion). **France** and **Italy** remained roughly stable.
The overall trend is a more even distribution of imports among member states, consistent with the fall in extra-EU import concentration seen earlier.
Full country-level data are in the Reporters section.

Export champions: Spain, Italy and Central Europe gain ground

On the export side, the strongest relative gains among major member states were recorded by:

- **Spain**: +171.8% (from €0.23 billion to €0.62 billion)
- **Italy**: +108.3% (from €0.35 billion to €0.73 billion)
- **Germany**: +71.9% (from €0.74 billion to €1.27 billion)
- **France**: +60.2% (from €1.01 billion to €1.62 billion)

Together with the **Netherlands** (€1.48 billion), they form the core of EU feed exports.

The revealed specialisation indices for 2025 (Most Specialised Reporters) highlight a group of Eastern and Baltic EU members that are particularly specialised in CN 23 trade relative to their total trade:

- **Hungary** (RSCA 0.33)
- **Latvia** (0.27)
- **Lithuania** (0.21)
- **Poland** (0.20)

- **Denmark** (0.19)

This spatial pattern reflects the significance of agricultural processing and feed compound manufacturing in these countries, supported by competitive feedstock sourcing and strategic location near large livestock markets.

Conclusion

Over the 2015–2025 period, EU trade in food industry residues and animal feed underwent a significant transformation. Exports surged both in volume and, especially, in value, driven by prepared animal feed and higher unit prices, while import growth remained moderate and largely confined to bulk oilcakes. The result was a 60% reduction in the trade deficit. At the same time, the trading partner landscape shifted dramatically: Russia nearly disappeared as a supplier, Ukraine weathered severe disruptions to grow, and EU exports spread across a much broader set of high-income and emerging markets. Within the EU, the concentration of both imports and exports among member states decreased, with new specialised players in Central and Eastern Europe gaining prominence. The combined effect is a more resilient, diversified, and value-oriented trade structure for this strategic sector, though the lingering volatility — especially in prices of staple oilcakes — calls for continued monitoring of global commodity and geopolitical risks.

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