EU TRADE EXPLORER

Market evolution: Food preparations (CN 2106) — 2015–2025

Introduction

Food preparations not elsewhere specified (CN 2106) is a bundling heading that combines protein concentrates and textured protein substances (210610) with a broad residual category of other food preparations (210690). The product class includes dietary supplements, herbal infusions, flavoured or coloured sugar syrups, and numerous ready-to-use formulations. This report examines how EU extra-EU trade in CN 2106 evolved between 2015 and 2025, drawing exclusively on data from the dashboard. The analysis reveals a sector marked by strong export growth, rising unit values, a more diversified partner base, and deep structural autonomy.

Export boom propelled by value-adding and premiumisation

Export value nearly doubles, outstripping import growth and doubling the trade surplus.

EU exports of food preparations rose from €5.85 billion in 2015 to €11.40 billion in 2025, a rise of 94.8 % (EU trade flows). Imports increased as well, from €2.02 billion to €3.66 billion (+80.9 %), yet the gap between the two widened markedly. Consequently, the trade surplus more than doubled from €3.83 billion to €7.74 billion (+102.1 %). The headline numbers underscore a sector where the EU consistently sells far more than it buys from non-EU partners.

Indicator	2015	2025	Change (%)
Export value (billion EUR)	5.85	11.40	+94.8
Import value (billion EUR)	2.02	3.66	+80.9
Trade balance (billion EUR)	3.83	7.74	+102.1
Export volume (thousand t)	1 365	1 772	+29.8
Import volume (thousand t)	425	598	+40.7

The price of exported food preparations rose by half, reflecting product upgrading and higher-value market segments.

Export volumes expanded by 29.8 %, but the average export unit value surged by 50.1 %, from €4.29 per kg to €6.43 per kg. This divergence indicates that the EU is moving up the value chain, selling more sophisticated, branded, or nutritionally-enhanced preparations. Import unit values also rose, albeit more modestly (+28.6 %), so the price gap between EU exports and imports widened. The price-driven export growth stands out as the dominant dynamic over the whole ten-year window.

The dominant subcategory ‘210690’ — which includes dietary supplements and other preparations — saw a particularly strong price acceleration.

The product group CN 210690 (Food preparations, n.e.s.) accounts for the vast majority of trade. Its export unit price advanced from €4 252 per tonne in 2015 to €6 443 in 2025, a jump of 51.6 % (Product subcategories). By contrast, the much smaller protein concentrates segment (210610) experienced a virtually stagnant export price (from €5 899 to €6 135 per tonne). Therefore, the overall export premiumisation is primarily a story of the broad-spectrum “other food preparations” category, likely driven by demand for functional foods and dietary supplements.

A more diversified and resilient partner landscape emerges

Import concentration fell sharply as the EU sourced more from rapidly expanding Asian partners.

The Herfindahl-Hirschman Index for extra-EU imports declined from 1 684 in 2015 to 1 159 in 2025 (–31.2 %), signalling a far less concentrated supplier base (Concentration trends). While traditional suppliers such as the United Kingdom, Switzerland and the United States still feature prominently, the most explosive growth came from Sri Lanka (+878.5 %), Indonesia (+436.6 %), and China (+311.9 %), albeit from a low base in some cases. The share of “Other” partners in EU imports rose from 23 % to nearly 30 %, confirming a genuine broadening of sourcing.

Import partner	2015 (million EUR)	2025 (million EUR)	Change (%)
United Kingdom	617.1	875.4	+41.9
Switzerland	338.7	347.7	+2.6
United States	392.4	594.6	+51.5
China	100.4	413.6	+311.9
Indonesia	20.0	107.2	+436.6
Sri Lanka	16.1	157.6	+878.5

Export concentration also declined, with China, Switzerland and the United States capturing growing shares of EU shipments.

The export HHI fell from 601 to 481 (–19.9 %), meaning the EU's customer base became more diffuse. Even so, several non-EU markets recorded outsized increases: shipments to China soared by 352.1 %, to Switzerland by 139.8 %, and to the United States by 125.1 % (Top trade partners). These three destinations collectively added €1.45 billion in export value over the period, absorbing much of the additional output while reducing reliance on any single market.

The United Kingdom remains the top trade partner, but its relative importance has moderated as new markets gain ground.

Despite remaining the largest export and import destination, the UK's share of total extra-EU trade in CN 2106 has narrowed. Exports to the UK grew by 45.1 % (still the largest single bilateral flow at €1.72 billion in 2025), but far greater growth rates in other Asian and North American markets have diluted its relative weight. On the import side, the UK's share also declined as supply chains diversified toward lower-cost or more specialised sources. The declining concentration ratios reflect a deliberate and sustained shift toward a more multi-polar trading pattern.

Deepening structural autonomy and contained external vulnerability

Net import reliance turned increasingly negative, confirming the EU's self-sufficiency in food preparations.

The net import reliance indicator moved from +0.4 % in 2008 to –1.1 % in 2024, a drop of 362.7 % (Net import reliance). A negative reading means the EU exports more than it imports relative to its domestic production, i.e., the bloc is a net supplier to the rest of the world. The trend consistently deepened throughout the 2015-2025 window, so the EU's dependence on third-country food preparations diminished rather than grew.

Domestic production volume and value expanded dramatically over the decade, albeit with significant data reliability caveats.

According to PRODCOM estimates, EU production quantity jumped from 783 million kg in 2008 to 7 518 million kg in 2024 (+859.1 %), while production value rose from €4.8 billion to €21.6 billion (+348.1 %) (EU production volumes). The data should be treated with caution because many years carry "partial estimate" or "rounded" flags, and the massive scale jump around 2020 coincides with methodological changes. Nevertheless, even a conservative reading signals a substantial expansion of the EU's manufacturing base for food preparations, underpinning the strong export performance and the shift into net-exporter territory.

Trade intensity softened and export propensity held steady, while the limited price shocks on exports highlight overall market resilience.

Trade intensity (extra-EU trade relative to production) moderated from an initial 10.6 % in 2015 to 3.8 % in 2024, and export propensity remained virtually stable at 2.4 % in both 2015 and 2024 (Autonomy & vulnerability). This indicates that the EU's engagement with non-EU markets did not increase its structural vulnerability; instead, a larger domestic market absorbed most of the production growth.

The shock-detection algorithm identified only four price events on the export side — most notably a –26 % price shift to Australia in 2017 and a –31 % shift to the United States in 2018 — but no supply shocks (Price shock events). The high coefficient of variation for some import sources (Sri Lanka 0.66, Indonesia 0.37) points to volume volatility but did not translate into systemic disruptions. Overall, the sector proved resilient, with limited price-shock episodes and a steadily improving trade surplus.

Conclusion

Between 2015 and 2025, EU extra-EU trade in food preparations (CN 2106) underwent a quiet transformation. Export value almost doubled, driven more by rising unit values than by volume, as the EU moved toward higher-value dietary supplements and functional foods. Import growth remained solid but did not keep pace, causing the trade surplus to double. Geographically, both imports and exports became less concentrated, with fast-growing Asian partners reshaping the supplier landscape and China, Switzerland, and the United States absorbing a larger share of EU exports. Underpinning these trade flows, domestic production expanded massively, turning the EU into a consistent net exporter with negative net import reliance. Trade intensity declined and no major supply shocks materialised, confirming a high degree of structural autonomy. While production data suffer from reliability concerns, the trade figures paint a picture of a mature, value-driven sector that has successfully diversified its external linkages without increasing its vulnerability.

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