Market evolution: Fruit and vegetable juices (CN 2009) — 2015–2025

Introduction

This report examines the European Union’s extra-EU trade in **fruit and vegetable juices** (CN 2009) from 2015 to 2025. The analysis covers headline trade values, volumes and unit prices, as well as partner and product-segment dynamics, using year-frequency data from the Trade Dashboard. Over the decade the sector experienced a fundamental shift from volume-driven trade to a value-driven model, accompanied by significant geopolitical realignments and a notable improvement in self-sufficiency.

1. From Volume to Value: The Price-Driven Transformation of EU Juice Trade

Export values surged while quantities barely moved, highlighting powerful unit-price escalation.

Between 2015 and 2025, EU **exports** of fruit and vegetable juices rose by **59.9 %** in value (from €1,395 million to €2,231 million) while shipped **volume inched up only 1.9 %** (from 1,265 thousand tonnes to 1,289 thousand tonnes). The average export unit price consequently jumped **56.9 %** (€1,103 to €1,730 per tonne).
Trade overview

Import demand contracted in volume but expanded in value because of even steeper price rises.

On the **import** side, the EU spent **28.6 %** more on juices from outside the bloc (€2,261 million to €2,908 million), even though the **tonnage purchased fell by 29.8 %** (2,185 thousand tonnes to 1,535 thousand tonnes). The import unit price therefore **shot up 83.1 %** (€1,035 to €1,895 per tonne), much faster than the export price.

Flow	Value change (2015→2025)	Volume change	Price change
Exports	+59.9 %	+1.9 %	+56.9 %
Imports	+28.6 %	−29.8 %	+83.1 %

The trade balance improved notably, driven by narrowing volume deficits.

The **trade deficit** shrank from –€866 million in 2015 to –€677 million in 2025, a **21.8 % reduction**. This was achieved despite higher import prices, because the physical import volume collapsed while export volume remained almost flat.

2. Geopolitical Reordering: Brexit, Emerging Partners, and a More Diversified Landscape

The UK's departure from the EU single market created a structural break in juice trade.

Imports from the United Kingdom plummeted by **64.6 %** (€166 million to €59 million), making it the most volatile import source (coefficient of variation 0.73). A sharp price shock was detected in 2021: unit prices rose 39.1 % above the pre-Brexit baseline as volumes collapsed (see Section 3). Meanwhile, EU **exports to the UK** grew modestly (+31.4 %), retaining the UK as the top export destination.

Top partners by value   Price shock events

Export markets diversified far beyond traditional rich-country partners.

Several non-traditional destinations recorded triple-digit growth:

- **China**: +327.9 % (€27 million → €115 million)
- **Saudi Arabia**: +148.9 % (€43 million → €107 million)
- **Switzerland**: +83.9 % (€56 million → €102 million)
- **United States**: +78.4 % (€132 million → €236 million)

At the same time, exports to long-standing partners such as **Norway** (+30.8 %) and **Japan** (+54.6 %) also expanded. This broad-based growth reduced export concentration (HHI fell from 2,284 to 1,678, –26.5 %).

Import sourcing became less reliant on Brazil alone, with new suppliers gaining ground.

Brazil remained the largest extra-EU supplier, but its value increased only 1.8 % over the decade. In contrast, imports surged from:

- **Türkiye** (+84.6 %)
- **Argentina** (+69.0 %)

- **Ukraine** (+66.7 %)
- **Costa Rica** (+41.4 %)

The import HHI fell from 2,751 to 1,803 (–34.5 %), signalling a healthier, more diversified supply base.

Import partner	Change 2015→2025
Brazil	+1.8 %
Costa Rica	+41.4 %
United Kingdom	–64.6 %
Türkiye	+84.6 %
Ukraine	+66.7 %
Argentina	+69.0 %

3. Shocks, Specialisation, and Self-Sufficiency: The Sector's Resilience

Two major price shocks disrupted trade flows during the pandemic and the post-Brexit period.

- **US export price shock (2020):** Export unit price to the United States jumped 26.9 % above the 2018-19 baseline, while volume halved (abnormality 6.1). This reflects the severe logistical and supply-chain disruptions of the early pandemic.
- **UK import price shock (2021):** Import unit prices from the UK rose 39.1 % as post-Brexit trade barriers took effect, causing quantities to shrink to just 17 % of the 2019-20 average.
  Price shock events

EU member states exhibit stark differences in juice-trade specialisation.

In 2025, the most export-specialised reporters (RSCA > 0.3) were **Cyprus** (0.62), **Spain** (0.36), **Netherlands** (0.34), **Poland** (0.31), and **Austria** (0.26). These countries account for a disproportionate share of EU extra-EU exports. Spain alone increased its exports by 190.5 %, becoming the largest exporter among member states.
Specialisation map   Top reporters

Most specialised reporters (2025)	RSCA	RCA
Cyprus	0.623	4.30
Spain	0.360	2.12
Netherlands	0.340	2.03
Poland	0.312	1.91
Austria	0.261	1.70

The EU has become significantly more self-sufficient in juice production.

Net import reliance (the share of apparent consumption met by extra-EU imports) fell from **20.7 % in 2015 to 8.1 % in 2025** (–60.9 %). Domestic production value surged from €2,141 million (2003) to €8,339 million (2024), a **289 % increase**, while quantity rose by 96 % over the same long-term horizon.

Net import reliance Production volumes

The product mix has shifted towards higher-value juice segments.

Looking at the sub-headings, the most striking price escalation occurred in **concentrated orange juice** (CN 200919): import unit price soared from €1,572 per tonne in 2015 to €4,616 in 2025. **Apple juice >20° Brix** (CN 200979) saw its import price more than double (€812 → €1,773), and export unit prices for **mixtures** (CN 200990) and **grape juice >30° Brix** (CN 200969) also climbed strongly. Volumes in these premium categories generally held up or grew, indicating a structural move towards added-value products.

Product segment comparison

Conclusion

Between 2015 and 2025, the EU's fruit and vegetable juice trade was defined by **powerful price inflation** that lifted export and import values far beyond what modest volume changes would suggest. The **geopolitical landscape** was reshaped by Brexit, which fractured the UK's trade role, while EU exports diversified rapidly towards Asia, the Middle East and North America. On the import side, traditional concentration on Brazil gave way to a broader supplier base. The sector also demonstrated **growing resilience**: net import reliance fell sharply, domestic production expanded, and product trade shifted towards higher-unit-price categories. Detected price shocks during the pandemic and post-Brexit adjustment highlighted the sensitivity of the market, but the overall trajectory points to a more sophisticated, diversified and self-sufficient European juice industry.

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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.