Market evolution: Glass and glassware (CN 70) — 2015–2025

Introduction

The chapter 70 of the Combined Nomenclature covers a wide range of glass products, from cullet and flat glass to containers, safety glass, glass fibres, tableware and mirrors. This report analyses the European Union's external trade with non-EU partners over the period 2015–2025, based on annual data. The decade was marked by a strong expansion of imports, a much more modest rise in exports and a dramatic narrowing of the EU's trade surplus. Price dynamics, shifting partner concentrations and a series of supply-side shocks reshaped the market landscape. The analysis draws exclusively on the figures available on the Trade Dashboard.

1. A vanishing surplus: the rapid catch-up of imports

EU glass exports grew only marginally in value, while import values expanded by more than 60 %.

Between 2015 and 2025, EU extra-EU exports of glass and glassware rose from €7.88 billion to €8.53 billion (+8.2 %), whereas imports surged from €5.17 billion to €8.44 billion (+63.3 %). The volume data reveal an even sharper contrast: export quantities contracted from 3.80 million tonnes to 3.55 million tonnes (−6.6 %), while import volumes jumped from 3.48 million tonnes to 5.28 million tonnes (+51.5 %). Consequently, the unit price of exports increased from €2 075 to €2 404 per tonne (+15.9 %), while the import unit price edged up from €1 485 to €1 600 (+7.7 %).

Indicator	2015	2025	Change
Exports (€ bn)	7.88	8.53	+8.2 %
Imports (€ bn)	5.17	8.44	+63.3 %
Trade balance (€ bn)	2.71	0.08	−96.9 %
Export volume (million t)	3.80	3.55	−6.6 %
Import volume (million t)	3.48	5.28	+51.5 %
Export unit price (€/t)	2 075	2 404	+15.9 %
Import unit price (€/t)	1 485	1 600	+7.7 %

Source: Trade overview

The collapse in the trade balance reflects a fundamental realignment of the EU's external glass trade position.

The surplus shrank from an initial €2.71 billion to just €84 million in 2025. After dipping in the pandemic year 2020, the surplus temporarily recovered but then fell steadily as import growth outpaced exports. The net import reliance (expressed as a negative percentage because the EU is a net exporter) moved from −10.4 % to only −1.9 %, indicating that the EU's external trade in glass is now almost perfectly balanced.

Rising unit prices, especially on the export side, cushioned the value of shrinking export volumes.

The export price rose to a peak of €2 657 per tonne in 2022 before settling at €2 404 in 2025. On the import side, the price increase was more contained, reaching a high of €1 691 in 2022 and then declining to €1 600. This price behaviour suggests that EU producers were able to pass on higher costs better than foreign suppliers, partly because of a shift towards higher-value products.

2. Shifting partners and growing concentration risks

China and Türkiye have become dominant import suppliers, while trade with Russia and Ukraine was severely disrupted.

The geography of EU imports changed profoundly. Over the decade, imports from China more than doubled from €1.69 billion to €3.63 billion (+115.3 %), making it by far the largest source. Türkiye likewise expanded its sales from €0.35 billion to €0.73 billion (+107.4 %). Imports from Egypt climbed by 218.4 % and those from Ukraine by 151.5 %. In contrast, imports from Russia plummeted by 77.3 % as sanctions took hold, while Switzerland's share shrank by 11.0 %. The United Kingdom remained a stable partner, with imports essentially flat at around €0.70 billion.

Exports were more diversified. The leading destinations—the United Kingdom, Switzerland and the United States—recorded moderate changes. Exports to the UK edged down by 2.7 % to €1.43 billion; shipments to Switzerland grew by 29.4 % to €0.82 billion; and the US market expanded by 8.5 % to €1.55 billion. Rapid growth was seen in exports to Türkiye (+56.1 %), Serbia (+94.9 %) and especially Ukraine (+233.7 %).

Top import partners	2015 (€ bn)	2025 (€ bn)	Change
China	1.69	3.63	+115.3 %
United Kingdom	0.70	0.71	+1.2 %
Türkiye	0.35	0.73	+107.4 %
Switzerland	0.23	0.20	−11.0 %
Egypt	0.06	0.19	+218.4 %
Ukraine	0.06	0.15	+151.5 %

Source: Top partners

Import market concentration increased markedly, contrasting with stable export diversification.

The Herfindahl-Hirschman Index (HHI) for imports rose from 1 671 in 2015 to 2 200 in 2025 (+31.7 %), driven mainly by China's expanding weight. Export concentration, on the other hand, remained low and even decreased slightly from 888 to 855 (−3.6 %), underscoring that EU exporters serve a broad and stable set of markets.

Price shocks in 2022 exposed vulnerabilities across several key trade lanes.

The year 2022 saw sharp price increases on multiple trade flows. On the import side, unit values from Egypt surged by 34.7 %, from Malaysia by 32.8 % and from Türkiye by 37.1 % relative to the 2020-21 baseline, against a backdrop of still-rising quantities. On the export side, price spikes occurred in sales to Serbia (+29.9 %), Bosnia and Herzegovina (+45.0 %) and the United Kingdom (+24.2 %). These shocks, detected by the shock-detection module, reflect the combined effect of post-pandemic logistics bottlenecks, high energy costs and the war-induced commodity price rally.

Additionally, several partners displayed high volume volatility over the whole period: imports from Russia had a coefficient of variation of 0.71, and imports from Egypt and Ukraine showed CVs of 0.37 and 0.32 respectively. Export volumes to Russia and Ukraine were equally unstable (CV above 0.51 for both), underlining the geopolitical risk inherent in these markets.

3. Production resilience and the weight of high-value segments

EU glass production expanded significantly, driven by a doubling of unit value alongside moderate volume growth.

Although the production data should be treated with caution (many estimates carry a “partial” or “estimate” reliability flag), the available figures point to a substantial increase in the value of EU glass production. Between 2015 and 2024, production quantity rose from 82.5 billion units to 91.6 billion units (+7.4 %). Over the same period, the value of production jumped from €19.6 billion to €29.3 billion (+61.0 %), implying a sharp rise in the average unit price, from €0.24 to €0.32 per unit. This mirrors the export-price trend and suggests that EU manufacturers have moved toward higher-value products.

A group of smaller EU economies shows strong export specialisation in glass products, while others remain disengaged.

According to the specialisation data for 2025, the most specialised exporters (measured by the Revealed Symmetric Comparative Advantage, RSCA) are Croatia (0.52), Bulgaria (0.48), Luxembourg (0.46), Portugal (0.38) and Latvia (0.34). These nations have a disproportionately high share of glass exports in their total exports. At the opposite end, Ireland (−0.86), Cyprus (−0.86), Greece (−0.57), Malta (−0.44) and Sweden (−0.41) exhibit very little specialisation in glass. This pattern highlights a division of labour within the EU, where a few member states carry most of the external competitive edge.

High-value product segments dominate trade, reflecting the sector’s technological orientation.

Looking at the product composition of trade, a few headings account for the bulk of extra-EU flows.

On the import side, the largest values in 2025 were recorded for:

- Glass fibres (7019): €1.56 billion
- Glass mirrors (7009): €1.42 billion
- Safety glass (7007): €1.30 billion
- Glass containers (7010): €1.14 billion
- Table/kitchen glassware (7013): €1.06 billion

Exports were led by:

- Glass containers (7010): €1.50 billion

- Table/kitchen glassware (7013): €1.32 billion
- Glass fibres (7019): €1.24 billion
- Safety glass (7007): €1.03 billion
- Float glass (7005): €0.55 billion

The mirror segment (7009), which is highly valued per tonne (over €5 000/tonne on both sides), illustrates the EU's strong position in premium glass articles. Meanwhile, container glass (7010) shows a clear shift: import volumes rose sharply while export volumes barely changed, and import prices increased by more than export prices, reinforcing the overall picture of import competition catching up.

Conclusion

Over the 2015–2025 period, the EU's external trade in glass and glassware has been reshaped by a powerful import catch-up. While exports grew modestly and benefited from higher unit prices, imports expanded by nearly two-thirds in value, shrinking the trade surplus to a negligible €84 million. The import source base has concentrated around China and a few other fast-growing suppliers, raising potential vulnerabilities, while export markets remain well diversified. The sector itself has shown resilience: production value has risen sharply and smaller member states demonstrate notable export specialisation. However, the combination of price shocks, geopolitical disruptions and increasing import reliance—now almost at the zero-balance point—calls for continued attention to supply-chain security and to the competitive positioning of high-value EU output.
