

Market evolution: Glass bottles and containers (CN 7010) — 2015–2025

Introduction

The product group CN 7010 (glass carboys, bottles, jars, ampoules, stoppers and similar containers for the conveyance or packing of goods) is a key industrial input in the food, beverage, pharmaceutical and cosmetics sectors. This report examines the European Union's external trade in CN 7010 with non-EU partners over the period 2015–2025, using yearly data from the Trade Dashboard. The EU has consistently been a net exporter of glass containers, but the decade has been marked by a dramatic import surge, important shifts among trading partners, strong price shocks around 2022, and increasing concentration of foreign supply. The following three sections unpack these dynamics, focusing first on the erosion of the trade surplus, then on the redrawing of supply chains and finally on the EU's internal production and specialisation patterns.

1. Imports Outpace Exports: The Erosion of the EU's Trade Surplus

The overall trade picture shows a significant decoupling between exports and imports: while extra-EU exports grew moderately, imports expanded at a much faster pace, leading to a sharp reduction of the trade surplus.

EU exports grew in value terms, but import values more than doubled, shrinking the trade balance by nearly half

General trade figures show that export value rose from €1,174 million in 2015 to €1,503 million in 2025 (+28.0 %), while import value jumped from €479 million to €1,138 million (+137.3 %). Consequently, the trade surplus contracted from €695 million to €365 million (–47.4 %).

Indicator	2015	2025	Change (%)
Exports (million EUR)	1,174	1,503	+28.0
Imports (million EUR)	479	1,138	+137.3
Balance (million EUR)	695	365	–47.4

Volume trends reveal a stark divergence: export quantities barely changed whereas import volumes surged by over three-quarters

Export volumes remained essentially flat, moving from 1.18 million tonnes in 2015 to 1.21 million tonnes in 2025 (+2.5 %). In contrast, import volumes expanded from 0.67 million tonnes to 1.20 million tonnes (+78.3 %). Therefore the growth of the import bill was driven by a combination of higher volumes and higher unit prices.

Indicator	2015	2025	Change (%)
Export quantity (kt)	1,183	1,213	+2.5
Import quantity (kt)	674	1,202	+78.3

Price rises amplified both import and export values, but import prices climbed faster, reflecting supply-side pressures

The average unit price of exported goods rose from €992/tonne in 2015 to €1,239/tonne in 2025 (+24.8 %). Import prices increased even more, from €711/tonne to €947/tonne (+33.1 %). This suggests that external suppliers faced, and passed on, substantial cost increases, notably in energy-intensive glass production.

The composition of trading partners shifted dramatically, with China and Türkiye becoming dominant import sources

Looking at the top non-EU partners, China emerged as the largest extra-EU supplier of glass containers, with imports rising from €96 million to €355 million (+268 %). Türkiye posted the most spectacular growth, from €17 million to €128 million (+657 %), while Ukraine (€55 million to €136 million, +150 %) and Moldova (€18 million to €51 million, +188 %) also expanded strongly. Imports from Russia vanished almost completely (from €10 million to less than €0.1 million, -100 %). On the export side, the United Kingdom remained the foremost destination (€236 million to €370 million, +57 %), followed by Switzerland (€133 million to €196 million, +47 %) and the United States (€244 million to €273 million, +12 %), while exports to Serbia more than doubled (€30 million to €75 million, +152 %).

2. Concentration, Volatility and Geopolitical Shocks: The Redrawing of Supply Chains

The rapid growth of imports was accompanied by a higher concentration of suppliers and pronounced price volatility, especially around the 2022 energy-price shock and the Russian invasion of Ukraine.

Import concentration rose significantly as China's share expanded, increasing the EU's vulnerability to single-source disruptions

The Herfindahl-Hirschman Index (HHI) for extra-EU imports increased from 1,198 in 2015 to 1,699 in 2025 (+41.8 %), indicating a more concentrated supply base. Export concentration also rose, but only moderately, from 1,041 to 1,189 (+14.2 %). The growing dependence on a handful of suppliers, particularly China, makes the EU more exposed to disruptions in a few key partners.

Indicator	2015	2025	Change (%)
Import HHI (value)	1,198	1,699	+41.8
Export HHI (value)	1,041	1,189	+14.2

The Russia-Ukraine war triggered severe price shocks for key import partners, especially Ukraine and Türkiye, while also affecting UK export prices

The price-shock detection analysis identifies a cluster of abnormal price jumps centred on 2022. Imports from Ukraine saw a price shift of +58.7 % (abnormality score 19.3) as quantities collapsed in the face of war-related disruptions. Türkiye recorded a +47.4 % price increase (abnormality 20.3), while UK import prices spiked by +46.8 % in 2023 (abnormality 7.0). On the export side, the United Kingdom experienced a +20.2 % price shock (abnormality 36.8) and Morocco a +39.3 % shock (abnormality 23.0), reflecting the broad upward pressure on glass-container prices caused by soaring energy costs.

Shock event	Flow	Year	Price shift (%)	Abnormality
Ukraine	Import	2022	+58.7	19.3
Türkiye	Import	2022	+47.4	20.3
United Kingdom	Import	2023	+46.8	7.0
United Kingdom	Export	2022	+20.2	36.8
Morocco	Export	2022	+39.3	23.0

Volatility in import volumes exposed high-risk suppliers, with Russia, Belarus and Türkiye showing the greatest instability

Year-on-year volume volatility (coefficient of variation) was highest for imports from Russia (0.92), Belarus (0.76), Türkiye (0.56) and Serbia (0.48). Exports, on the other hand, were far more stable, with the lowest CVs observed for Switzerland (0.08), Norway (0.08) and Bosnia and Herzegovina (0.08). The high import volatility signals unreliable supply streams, which contributed to the price spikes noted above.

High-volatility import origin	CV	Stable export destination	CV
Russia	0.92	Switzerland	0.08
Belarus	0.76	Norway	0.08
Türkiye	0.56	Bosnia and Herzegovina	0.08
Serbia	0.48	—	—

3. Production Capacity and Intra-EU Specialisation: Resilience in an Uncertain Environment

Despite the growing import penetration, the EU's own glass-container industry expanded its output value considerably and a number of Member States carved out strong export specialisations.

EU production value grew strongly, driven by price increases rather than volume expansion, mirroring export trends

EU production data (latest available year 2024) shows that the quantity produced rose modestly, from 81.6 billion pieces in 2015 to 85.9 billion pieces in 2024 (+5.3 %). Over the same period, the production value increased from €8.1 billion to €12.8 billion (+58.5 %), implying a sharp rise in implicit unit values, consistent with the energy-intensive nature of glass manufacturing.

Production indicator	2015	2024	Change (%)
Quantity (billion pieces)	81.6	85.9	+5.3
Value (billion EUR)	8.1	12.8	+58.5

Member States revealed stark contrasts in specialisation, with Croatia, Portugal and Bulgaria highly export-oriented in glass containers, while Ireland and Finland barely participate

The revealed symmetric comparative advantage (RSCA) for 2025 highlights Croatia (RSCA +0.81), Portugal (+0.75), Bulgaria (+0.72) and Slovenia (+0.57) as very specialised in CN 7010 exports. At the other extreme, Ireland (−0.996), Finland (−0.988), Cyprus (−0.964), Sweden (−0.80) and Greece (−0.80) have minimal export presence. These disparities reflect where glass-container manufacturing clusters are established within the EU.

Most specialised (RSCA)	Least specialised (RSCA)
Croatia (+0.81)	Ireland (−0.996)
Portugal (+0.75)	Finland (−0.988)
Bulgaria (+0.72)	Cyprus (−0.964)
Slovenia (+0.57)	Sweden (−0.80)
Estonia (+0.28)	Greece (−0.80)

The dominant product segment—bulk containers (701090)—drove trade dynamics, with imports increasingly complementing EU production

The sub-heading breakdown shows that CN 701090 (general-purpose glass containers) accounts for almost all extra-EU trade. In imports, 701090 represented 94.5 % of total value in 2015 and 95.9 % in 2025. Its import quantity rose from 665 kt to 1,187 kt, while export volume of the same sub-heading barely changed (1,176 kt to 1,207 kt). The smaller categories—stoppers (701020) and ampoules (701010)—contributed only minor shares. The surge in 701090 imports supplied the EU's food, beverage and pharmaceutical industries at a time when domestic production volume grew slowly and unit costs rose sharply.

Conclusion

The 2015-2025 trajectory of EU trade in glass containers is one of an expanding domestic industry that adapted to rising costs through significant price increases, coupled with a dramatic influx of lower-priced imports, particularly from China and Türkiye. While the EU remains a net exporter, the surplus has nearly halved, and the import supply has become more concentrated and more volatile. Geopolitical events—above all the 2022 energy crisis and the war in Ukraine—triggered acute price shocks that re-ordered traditional trade relationships, virtually eliminating Russian imports and placing Ukraine and Türkiye under severe pricing stress. Internally, production value has grown robustly and certain Member States have developed strong export specialisations, but the sluggish volume growth of exports and the increasing trade intensity underline a growing reliance on extra-EU glass containers to meet domestic demand. The challenge for the coming years will be to balance the undoubted competitiveness of EU producers with the resilience of supply chains that have shown their vulnerability to both price and geopolitical shocks.

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