Market evolution: Lac and vegetable gums (CN 13) — 2015–2025

Introduction

The EU's trade in lac, gums, resins, and vegetable saps (CN 13) recorded solid value growth between 2015 and 2025, even as the volume picture diverged markedly between exports and imports. The EU consistently ran a trade surplus, which widened slightly from €233.3 million to €255.7 million (+9.6 %). Exports rose by 44.1 % in value (€1.15 bn → €1.65 bn) but fell 3.8 % in quantity, while imports jumped 52.9 % in value (€914 m → €1.40 bn) and 31.8 % in quantity General Overview. A sharp increase in EU export unit prices (+49.8 %) far outstripped import price growth (+16.0 %), signalling a shift toward higher-value processed products and improved terms of trade. The two sub-headings – natural gums/resins (1301) and vegetable saps/extracts (1302) – behaved very differently, with the latter dominating in value while the former remained a lower-price commodity segment. Against this backdrop, major partner shifts, rising concentration, and a series of price shocks reshaped the trade landscape.

1. Value-added extracts drive export revenues while cheaper raw materials dominate import volume

The processed segment (CN 1302) accounts for the lion's share of trade and commands a large price premium

Vegetable saps and extracts (CN 1302) consistently represented the bulk of value on both sides. In 2025, imports of 1302 totalled €1.136 bn (179.5 kt) versus only €246 m (90.8 kt) for 1301 Product Segment Breakdown. The price gap is stark: import unit values for 1302 ended at €6 326/t, while 1301 languished at €2 712/t. EU exports show an even stronger premium – in 2025, 1302 recorded an average price of €16 385/t (value €1.413 bn, 86.2 kt), against €6 201/t for 1301 (value €209 m, 33.7 kt). This structure reflects a division of labour in which the EU imports large quantities of relatively cheap raw gums and oleoresins, often for re-processing, while exporting high-value, specialised extracts.

Flow	CN 1302 value (2025)	CN 1301 value (2025)	CN 1302 price (2025)	CN 1301 price (2025)
Imports	€1 135.7 M	€246.2 M	€6 326/t	€2 712/t
Exports	€1 413.0 M	€209.0 M	€16 385/t	€6 201/t

Export unit values surged across the period, improving the EU's terms of trade

Overall export prices rose from €9 006/t in 2015 to a peak of €15 948/t in 2022, before settling at €13 489/t in 2025 – a 49.8 % increase over the decade. Import prices grew much more modestly, from €4 430/t to €5 138/t (+16.0 %). This widening gap boosted the purchasing power of EU exports and underpinned the surplus even as export volumes stagnated. The spike in 2022, visible in both flows, coincides with global supply-chain stress and a broad commodity price upswing; EU exporters of processed extracts appear to have been able to pass through costs more effectively than sellers of raw materials.

2. China, India and Vietnam propel import growth, while Russian exports collapse and concentration rises

China consolidates its position as the dominant import supplier, despite a sharp price shock

China's import value soared from €168.7 m in 2015 to €375.2 m in 2025 (+122.5 %), while volumes roughly doubled (12.4 kt → 24.0 kt) Top Partners. The year 2022 saw a price shock of +38.4 % (abnormality 19.5, value share 33.6 %), as unit values jumped from €13 682 to €18 934; the elevated price level persisted into 2023-24 before receding slightly Shocks. China's dominance, together with India's steady rise (+76.6 % to €226 m), pushed the import Herfindahl-Hirschman Index (HHI) from 900 to 1 208 (+34.2 %), indicating a less diversified sourcing landscape Concentration.

Vietnam's explosive growth transforms the import basket

Vietnam went from a negligible supplier (€66 thousand in 2015) to a notable player (€22.7 m in 2025, +34 139 %). Volumes rocketed from 81 t to 22 606 t, though the trajectory was anything but smooth: a 588.7 % price shock in 2017 was followed by huge volume swings (CV = 1.38) Volatility. This represents a structural – if volatile – new supply stream for the EU.

Sanctions slash exports to Russia, while an opaque "unspecified" category surges

EU exports to the Russian Federation fell by 46.3 % (€73.5 m → €39.5 m) over the decade, with volumes contracting from 8 282 t to 3 554 t. Meanwhile, the category "Countries and territories not specified for commercial or military reasons in the framework of extra-Union trade" exploded from €19.7 m to €198.6 m (+908.5 %). This opaque flow, which mirrors destination-switching patterns seen in other sanctioned goods, raises questions about the ultimate end-market of EU-origin gums and extracts.

Export market concentration also increases, led by the United States

The HHI for exports rose from 870 to 968 (+11.3 %). The United States remained the top destination, with exports climbing 42.1 % to €389.9 m, though the 2022 spike (€624.7 m, fuelled by a 35.7 % price shock) has since normalised. China (+49.7 %) and Switzerland (+72.3 %) also posted robust growth, while the UK, post-Brexit, saw modest export gains (+17.3 %) and a 3.8 % decline in imports.

3. Price shocks and volatile flows expose deep fragilities in supply chains

Vietnam and other emerging suppliers show extreme price instability

The shock detection algorithm flagged a record 588.7 % price surge for Vietnamese imports centred on 2017, linked to an imbalance between nascent volume growth and rigid pricing. The country's coefficient of variation for import quantities (1.38) is nearly ten times that of more established partners like India (0.17) or Sudan (0.16). Other volatile sources include the Dominican Republic (CV 0.89) and Chad (0.45), underscoring the reliability risks associated with rapidly scaling suppliers.

Brexit-related disruption was transitory but statistically significant

The UK's departure from the EU single market triggered a distinct price shock on imports in 2021: unit values fell 28.3 % (abnormality 27.7, value share 7.7 %), likely reflecting the initial trade friction and currency effects. Volumes did not fully recover, and UK import values stagnated (–3.8 %) over the whole period. Exports to the UK held up better, but the shock event underscores how political realignments can jolt this niche trade.

The 2022 global commodity spike was felt on both sides of the market

Several partners experienced large price increases centred on 2022. Imports from China (+38.4 %), the United States (+57.9 %) and the Philippines (+50.1 %) all saw abnormal jumps. On the export side, prices to the US rose 35.7 %, South Africa 56.8 %, and Australia 101.4 %. While most of these shocks partially unwound by 2024, the lingering effects – higher baseline prices and reduced volumes for some destinations – point to a structurally more expensive trading environment.

High volatility is concentrated among smaller, less diversified markets

Norway (export CV 1.72), the Dominican Republic (import CV 0.89), and Vietnam (import CV 1.38) top the volatility rankings, whereas large, well-established partners like the US (export CV 0.15, import CV 0.35) or Mexico (export CV 0.11) show stable quantities. This pattern suggests that the EU can manage exposure to traditional partners more effectively, while the pursuit of new sources brings significant supply-chain uncertainty.

Conclusion

The 2015–2025 period transformed the EU's trade in CN 13: a steady march towards high-value extracts boosted export revenues and improved terms of trade, even as import volumes surged to meet processing demand. China and India deepened their roles as critical suppliers, and Vietnam emerged as a high-potential yet volatile source. Import concentration rose notably, leaving the EU more dependent on a handful of Asian partners. Geopolitical forces – sanctions on Russia, Brexit, and the 2022 commodity spike – each left clear marks on trade flows and prices. Looking ahead, the EU's trade surplus appears resilient, but mitigating concentration risk, monitoring the erratic supply of emerging partners, and clarifying the opaque "unspecified" export channels will be essential to preserving stability and transparency in this niche but strategically important sector.

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