Market evolution: Miscellaneous edible preparations (CN 21) — 2015–2025

Introduction

This report examines the evolution of European Union external trade in Miscellaneous edible preparations (CN 21) from 2015 to 2025. The analysis draws exclusively on customs-based data and covers the most important dynamics in aggregate flows, partner concentration, product-segment composition, and market volatility. Three major themes emerge: a robust and deepening trade surplus sustained by broad-based export growth and declining partner concentration; a significant re-balancing of trade partners with a strong pivot towards the United States, China, and neighbouring European countries; and a clear pattern of premiumisation within the product mix, with prepared foods, sauces, and coffee/tea extracts leading the expansion.

1. A widening trade surplus built on robust export growth and slowly diversifying import sources

Aggregate trade values expanded vigorously, with exports rising faster than imports

Between 2015 and 2025, EU exports of CN 21 goods to non-EU countries nearly doubled in value, growing from €9.7 bn to €18.9 bn (+93.9 %). Over the same period, imports increased from €3.8 bn to €6.7 bn (+78.2 %). **Overview**

Trade flow	2015 (€ bn)	2025 (€ bn)	Change (%)
Exports	9.73	18.86	+93.9
Imports	3.77	6.71	+78.2
Balance	5.96	12.15	+103.9

The trade surplus consequently more than doubled, reaching €12.2 bn in 2025. Exports grew not only in value but also in volume (+35.7 %), implying a strong price component (unit value +43.0 %). Import volume also expanded (+43.2 %), although price increases were more modest (+24.4 %).

Partner concentration fell on both the import and export sides, indicating a healthier diversification

The Herfindahl-Hirschman Index (HHI) for imports declined from 1676 in 2015 to 1089 in 2025 (−35.0 %), while the export HHI fell from 908 to 728 (−19.8 %). **Concentration** This indicates that the EU's trade in this category became markedly less dependent on a few large partners over the decade, a trend that enhances supply-chain resilience.

Net import reliance became more negative, underlining the EU's growing role as a net supplier

The net-import-reliance ratio moved from −3.3 % in 2015 to −9.1 % in 2024 (the last year with production data), i.e. the EU's net-export position as a share of apparent consumption deepened significantly. **Net import reliance** Trade intensity (exports plus imports relative to production value) rose from 10.9 % to 19.3 %, reflecting an increasingly outward-looking sector. **Trade intensity**

2. A transformed partner landscape: the United States surges, China and Serbia rise, and traditional links hold while adjusting

The United Kingdom remains the single largest partner, but its relative weight has diminished

The UK continued to dominate both EU exports (€2.6 bn to €4.2 bn, +58.9 %) and imports (€1.3 bn to €1.7 bn, +33.1 %) of CN 21 goods. **Top partners** Nevertheless, its share in total EU trade fell, consistent with the broader decline in concentration. Export volumes to the UK were exceptionally stable (CV of quantity: 0.07), while import volumes showed moderate variability (CV 0.18). **Volatility**

Exports to the United States almost tripled, making it the second most dynamic market

EU exports to the US rose from €0.62 bn to €1.85 bn (+199.1 %), driven by surging volumes (coefficient of variation 0.42, the highest among major export partners). Imports from the US also climbed, albeit more slowly (+58.0 %), reaching €0.77 bn in 2025.

Asian and Southeast European suppliers gained ground, while China and Ukraine exhibited the fastest import growth

Imports from China more than tripled, from €0.18 bn to €0.65 bn (+256.8 %), accompanied by very volatile quantities (CV 0.33). Imports from Serbia (+408.7 %) and Ukraine

(+427.1 %) expanded dramatically, although from low starting values. Thailand (+83.7 %) also cemented its role as a major supplier, notably of sauces and prepared foods.

Exports to Switzerland, Türkiye, and Norway roughly doubled, while shipments to Russia grew only slightly in value and contracted in volume

Switzerland (+104.8 %), Türkiye (+112.0 %), and Norway (+95.1 %) all posted strong value gains. Exports to the Russian Federation, by contrast, rose just 25.7 % in value terms; physical volumes actually fell from 115 thousand tonnes to 77 thousand tonnes, meaning the entire value increase came from price effects.

A few sharp price shocks punctuated the decade

The algorithm detected three notable price shocks. On the export side, unit values to the United Arab Emirates jumped 22.5 % in 2022 (abnormality 216.3), while those to Nigeria soared 43.0 % in the same year. On the import side, Turkish unit values surged 23.7 % in 2023. **Supply shocks** These events reflect the global inflationary pressures and logistical disruptions that affected food commodity and input prices after 2021.

3. Product-mix evolution: “Food preparations n.e.s.” remain the core, while sauces and ice cream register the highest growth rates

The 2106 sub-heading (Food preparations, not elsewhere specified) accounts for the largest share of both imports and exports

Exports of 2106 products grew from €5.85 bn to €11.40 bn (+94.8 %), and imports from €2.03 bn to €3.66 bn (+81.0 %). **Product segment comparison** This category alone represented more than half of total CN 21 trade, driven by items such as protein concentrates, flavoured syrups, and dietary supplements.

Sauces (2103) and ice cream (2105) recorded the most dynamic expansion

Export values for sauces increased from €1.41 bn to €3.14 bn (+122.9 %), making them the second largest export segment by 2025. Ice cream exports more than doubled, from €0.53 bn to €1.23 bn (+131.4 %). Imports followed a similar pattern: sauces rose from €0.63 bn to €1.25 bn (+98.1 %), and ice cream from €0.10 bn to €0.29 bn (+194.4 %).

Coffee, tea and mate extracts (2101) exhibited the strongest unit-value growth

Exports of category 2101 saw their average price climb from €9 844/t to €13 154/t (+33.6 %). Import prices moved even more dramatically, from €7 951/t to €11 986/t (+50.7 %). This premiumisation points to growing demand for high-quality soluble coffee and specialty tea-based preparations, notably from trading partners such as Switzerland and China.

Soups and broths (2104) were the notable laggard

Imports of soups actually declined in value (−18.3 %), from €0.13 bn to €0.11 bn, while exports grew only modestly (+30.5 %). This segment's weak performance suggests a shift towards fresh and chilled alternatives within the single market and reduced reliance on extra-EU supply.

EU production growth provides a solid foundation for the export boom

EU production value of CN 21 products rose from €25.4 bn in 2015 to €51.9 bn in 2024 (+146.5 %, estimate-based). **Production volumes** The data series for production quantity contains a strong outlier in 2018 (likely a statistical break), but the value series confirms a sustained upward trajectory, supporting the EU's ability to serve both domestic and export markets.

Conclusion

EU trade in Miscellaneous edible preparations expanded strongly over the 2015–2025 period, with exports growing faster than imports and the surplus doubling. The partner base became more diversified, reducing concentration risks, while important shifts occurred among leading partners—the United States replaced the United Kingdom as the main driver of incremental export growth, and China and Southeast European countries emerged as key import suppliers. Within the product mix, prepared foods, sauces, and ice cream led the expansion, underpinned by steady price increases and robust EU production. The combination of increasing trade intensity, a strengthening net-export position, and gradual diversification paints a picture of a competitive and resilient sector, albeit one that must remain attentive to price shocks and geopolitical disruptions in specific markets.

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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.