Market evolution: Oil seeds and grains (CN 12) — 2015–2025

Introduction

The EU's external trade in oil seeds, oleaginous fruits, grains, fodder and related plant products (CN 12) underwent a profound transformation between 2015 and 2025. Once nearly self-sufficient, the bloc became heavily dependent on imports, absorbing repeated price shocks and confronting heightened supply volatility. This report describes and interprets the main dynamics shaping that evolution, drawing exclusively on the provided figures.

A Structural Shift: From Near Self-Sufficiency to Deep Import Dependence

While both exports and imports expanded strongly, import growth in value terms outpaced the rise in exports, and the composition of trade moved decisively toward a permanent deficit.

Imports grew faster than exports, driven by both volume and price

Between 2015 and 2025, extra-EU imports of CN 12 products rose from €9.62 billion to €14.39 billion (+49.5 %), while exports advanced from €3.13 billion to €5.83 billion (+86.5 %) (trade overview). Import volumes climbed 26.6 % (from 19.2 million tonnes to 24.4 million tonnes), whereas export volumes surged 51.5 % (from 3.7 million tonnes to 5.6 million tonnes). Unit prices on the import side (€500 → €591 per tonne, +18.1 %) and, even more sharply, on the export side (€843 → €1 038 per tonne, +23.1 %) amplified the value increases.

The trade deficit widened substantially despite robust export performance

The trade balance, already negative at €–6.50 billion in 2015, deteriorated to €–8.56 billion in 2025, a 31.7 % deeper deficit. The gap peaked at €–13.70 billion in 2022, when import values hit a record €19.18 billion. Although exports continued to grow, they could not keep pace with the higher import bill, especially during the 2021-2022 price spike.

Net import reliance surged from practically zero to over 50 percent

The EU's net import reliance – a measure of how much domestic consumption depends on imports – swung from –0.6 % (effectively a slight net-export position) in 2015 to 51.9 % in 2025 (net import reliance). This dramatic reversal underlines the EU's transformed status from near self-sufficiency to heavy reliance on foreign suppliers, particularly for protein-rich oilseeds.

Shocks and Volatility: The Price Explosion and Supplier Instability

The 2021-2022 period was marked by extraordinary price spikes across both imports and exports, while several key partners exhibited high quantity volatility, creating a more uncertain trade environment.

A series of price shocks in 2021-2022 drove import costs to record highs

The import price for Ukrainian oilseeds jumped 50.2 % in 2021, and Australian supplies saw a 62.6 % price shock in 2022 (top shock events). These events, together with broader commodity market tensions, propelled total import value to €19.18 billion in 2022. By 2025, import prices had receded but remained elevated relative to 2015.

Supplier concentration eased slightly, but volatility from key partners remains high

The import Herfindahl-Hirschman Index (HHI) fell from 1 182 to 1 077 (–8.9 %), indicating a modest diversification of supply sources (concentration). Nevertheless, import quantity volatility remained extreme for some partners:

Partner	Coefficient of variation (quantity)
Paraguay	1.34
Canada	0.51
United Kingdom	0.50
Ukraine	0.41
Australia	0.39

(volatility bars – imports)

Canada's deliveries, for instance, swung from 4.15 million tonnes in 2020 to 0.82 million tonnes in 2024, while Paraguay's trade collapsed from over 1.1 million tonnes to just 31 000 tonnes over the decade.

Export markets experienced their own price shocks, particularly to Russia and the UAE

On the export side, the unit price of goods sold to the Russian Federation surged 293.8 % in 2022 (while volumes collapsed to one-quarter of the 2020-2021 baseline). Shipments to the United Arab Emirates also recorded a 50.4 % price spike that year. These shocks, together with elevated volatility in markets like Türkiye (CV 0.63) and Serbia (CV 0.74), significantly altered the value and stability of EU outbound trade (top shock events – exports).

Product-Led Divergence: High-Value Seed Exports Pay for Bulk Commodity Imports

The composition of trade reveals a clear split: the EU imports large volumes of commodity oilseeds while exporting much higher-value seeds for sowing, creating a value-added counterbalance.

Soya beans and rapeseed dominate imports, while seeds for sowing drive export earnings

Imports are anchored by soya beans (CN 1201) and rape or colza seeds (CN 1205). In 2025, soya bean imports amounted to €5.60 billion (14.2 million tonnes) and rapeseed to €3.48 billion (6.9 million tonnes) (product breakdown). Exports, by contrast, are led by "Seeds, fruits and spores, for sowing" (CN 1209), which generated €2.72 billion in 2025 – nearly half of total CN 12 export value – with an average unit price exceeding €22 000 per tonne. Other notable export categories include forage products (CN 1214, €0.38 billion) and sunflower seeds (CN 1206, €0.94 billion).

EU member state specialisation sharpens, with Romania and Bulgaria leading in forage and oilseeds

In 2025, the most specialised EU countries within CN 12 were Romania (revealed symmetric comparative advantage, RSCA = 0.74) and Bulgaria (RSCA = 0.66), followed by Latvia and Lithuania (top specialised reporters). Romania's export value in the chapter soared by 305 % over the decade – from €155 million to €629 million – while Bulgaria's rose 127 %. Meanwhile, the Netherlands and Germany remain the largest absolute traders, with the Netherlands accounting for 21.2 % of intra-EU exports of CN 12 goods in 2025.

Domestic production value skyrocketed as prices rose, though output grew only modestly

EU production quantity increased from 8.0 billion kg to 8.7 billion kg (+8.8 %) between 2015 and 2024, but the production value leapt from €1.0 billion to €4.6 billion (+360.9 %) (production volumes). The soaring value reflects the same global commodity price pressures that lifted import costs, indicating that EU producers captured higher farm-gate prices while production expanded only marginally.

Conclusion

Over the 2015–2025 period, EU trade in CN 12 products has become structurally unbalanced. The bloc's shift from near self-sufficiency to a net-import reliance exceeding 50 % is a defining vulnerability, driven by rising demand for protein meals and vegetable oils that domestic output cannot fully satisfy. Price shocks in 2021–2022 exposed the cost of this dependence, though a gradual diversification of suppliers and a strong export performance in high-value seeds for sowing provided a partial buffer. Looking ahead, the EU's exposure to volatile global oilseed markets will remain a central policy concern, while the specialised capacities of eastern member states offer a base for further resilience.

Generated on 2026-07-24 based on data from tradedashboard.eu

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.