Market evolution: Pesticides (CN 3808) — 2015–2025

Introduction

The product group covered by customs code 3808 comprises a wide range of pest- and disease-control agents—insecticides, fungicides, herbicides, disinfectants and similar goods—put up for retail sale or as preparations. This report examines the European Union’s extra-EU trade in these goods between 2015 and 2025, drawing on annual data extracted from the EU Trade Dashboard. The analysis highlights the main trends in trade values, volumes and prices, changes in partner and member-state structures, the presence of price shocks, and the evolution of production and specialisation. The period ends with completed years, so all comparisons are based on the 11 annual observations available.

A rising surplus: export price inflation outpaces falling import values and quantities

Headline trade values show a strengthening net-export position

Over the decade, EU exports of pesticides grew from €5.05 bn to €5.43 bn, an increase of 7.5 %, while imports declined from €2.07 bn to €1.92 bn (–7.4 %). As a result, the trade surplus widened from €2.98 bn to €3.51 bn (+17.8 %).
Source: Dashboard overview.

Flow	2015 (€ bn)	2025 (€ bn)	Change (%)
Exports	5.05	5.43	+7.5
Imports	2.07	1.92	–7.4
Balance	+2.98	+3.51	+17.8

Price movements explain the diverging fortunes

Imports fell both in value and quantity (–1.8 %), while their unit price dropped by 5.7 %. Exports, in contrast, recorded only a marginal volume increase (+0.8 %) and a price rise of 6.7 %, which drove almost all of the export value gain. The strong export price performance more than compensated for the modest volume growth.

Indicator	Exports (€/unit)	Imports (€/unit)
2015	7,360	7,885
2025	7,852	7,436
Change (%)	+6.7	–5.7

Source: same dashboard overview.

Net-import reliance turns deeply negative

The EU's already limited reliance on foreign supply fell further: the net-import-reliance ratio moved from –10.8 % in 2015 to –58.6 % in 2024 (the last year with production data), indicating a much stronger self-sufficiency position.
Net-import reliance.

Shifting partner landscape and widespread price shocks disrupt established flows

Import sources: China and Türkiye surge, Switzerland collapses

The top seven extra-EU suppliers accounted for the bulk of imports, but their relative weight changed considerably. While the United Kingdom and Israel remained the largest sources, imports from China more than doubled (+113 %), reaching €216 M in 2025, and those from Türkiye jumped by 362 %. Conversely, imports from Switzerland contracted by 81.5 %, falling from €415 M to only €77 M.
Top partners.

Export destinations: Ukraine, the US and Türkiye gain, while Brazil and Russia lose ground

On the export side, deliveries to Ukraine grew by 33 %, to the United States by 45.5 % and to Türkiye by 42.7 %. Shipments to Brazil, the second-largest destination in 2015, fell by 29.9 %, and exports to Russia, after a peak in 2022, ended the period 14.2 % lower than at the start. The United Kingdom remained the single most important market but its value was virtually unchanged (–4.7 %).
Top partners.

Concentration declines on both sides

The Herfindahl-Hirschman Index (HHI) for extra-EU imports fell from 2,087 to 1,893, indicating a slight reduction in supplier concentration, while the export HHI dropped from 655 to 534, confirming a further diversification of destination markets.
Concentration HHI.

2022 as a year of widespread price shocks

The volatility analysis identifies 2022 as a year of notable price shocks. On the import side, prices from the UK fell by 17.2 %, while those from China and India rose by 74.6 % and 67.3 % respectively. Export prices to several destinations also spiked: Bangladesh (+42.1 %), the UK (+21.2 %), Chile (+57.9 %) and Russia (+65.4 %). These shocks, visible in the annual price-based event detection, highlight supply-chain strains likely linked to post-pandemic logistical disruptions and geopolitical tensions.
Shock events — Volatility bars.

Structural transformation: production recovers, specialisation shifts, and market composition evolves

Production volume collapses then rebounds, but value surges

EU production of pesticides, after a massive decline from the early-2000s peak of over 16 bn units to around 1 bn units in the mid-2010s, began a steady recovery from 2015 onward. Production quantity increased from 1.07 bn units in 2015 to 1.90 bn in 2024 (+77 % within our window). More strikingly, the value of output more than doubled over the same period, from €5.91 bn to €9.34 bn, implying a strong shift towards higher-value, more sophisticated formulations.
Production volumes.

Member-state specialisation: France, Greece and Hungary lead

In 2025, the most specialised exporting member states—measured by revealed symmetric comparative advantage (RSCA)—were France (RSCA 0.47), Greece (0.38), Hungary (0.31), Spain (0.27) and Belgium (0.19). These five economies hold a disproportionately large share of EU pesticide exports relative to their overall export weight. On the other end, Finland, Slovakia and Sweden show minimal specialisation, with RSCA values below –0.75. The data confirm a clear concentration of the sector’s export capacity in a few western and central European countries.
Specialisation.

Trade composition by product segment

The product breakdown shows that fungicides (CN 380892) and herbicides (CN 380893) dominate both imports and exports, followed by insecticides (CN 380891) and disinfectants (CN 380894). Exports of insecticides fetched the highest unit prices (over €18,000 per tonne in 2025), while imports of fungicides exhibited a notable price decline over the peri-

od.
Product breakdown.

Conclusion

EU trade in pesticides over the past decade was marked by a widening surplus, driven almost entirely by export price increases and a simultaneous decline in import values and volumes. The partner structure shifted meaningfully, with China and Türkiye gaining ground as suppliers while traditional partners like Switzerland faded, and the US and Ukraine emerged as stronger export markets. The year 2022 stands out as a period of acute price shocks across multiple trading relationships. Underpinning these trade flows, EU production recovered in volume terms but, more importantly, shifted toward higher-value products, and the sector remained heavily concentrated in a handful of member states. These dynamics underscore the EU's growing self-reliance in pesticides and the ongoing transformation of its chemical crop-protection industry into a high-value, export-oriented activity.

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