EU TRADE EXPLORER

Market evolution: Pharmaceutical preparations (CN 3006) — 2015–2025

Introduction

CN 3006 is a bundled heading covering a wide range of pharmaceutical preparations and products, from sterile sutures and dental cements to diagnostic reagents, first-aid kits, ostomy appliances, and contraceptive preparations. This report analyses the European Union’s trade with non-EU countries between 2015 and 2025. Over the decade, the sector exhibited strong export-led growth, a rapidly swelling trade surplus, and significant shifts in partner concentration and price stability. The following three sections dissect the main dynamics: the remarkable expansion of exports and the surplus, the transformation of partner relationships punctuated by price shocks, and the structural changes in specialisation, concentration, and production.

1. An export-driven surge reshapes the trade surplus

1.1 Headline trade values and volumes point to a robust expansion of EU exports

Between 2015 and 2025, EU exports of CN 3006 products climbed from EUR 4,213.7 million to EUR 7,408.8 million, a 75.8 % increase. Imports rose more modestly, from EUR 1,384.8 million to EUR 2,118.6 million (+53.0 %). As a result, the trade balance swung from a surplus of EUR 2,828.9 million to EUR 5,290.2 million, an 87.0 % enlargement (Trade overview and headline figures).

Indicator	2015	2025	Change
Exports (million EUR)	4,213.7	7,408.8	+75.8 %
Imports (million EUR)	1,384.8	2,118.6	+53.0 %
Trade balance (million EUR)	2,828.9	5,290.2	+87.0 %
Export quantity (tonnes)	41,422	58,567	+41.4 %
Import quantity (tonnes)	24,439	40,787	+66.9 %
Export unit price (EUR/tonne)	101,722	126,500	+24.4 %
Import unit price (EUR/tonne)	56,660	51,937	–8.3 %

Export growth was fuelled by both volume (+41.4 %) and a rising unit price (+24.4 %), while imports expanded solely through volume (+66.9 %) as the average import price fell by 8.3 %. This divergence explains the extraordinary surplus growth.

1.2 Net-import reliance turns deeply negative as the EU becomes a net powerhouse

The net-import reliance ratio (net imports as a percentage of total consumption) fell from –43.9 % in 2015 to –134.3 % in the latest year, meaning the EU now exports far more than it needs to satisfy domestic demand. The ratio reached a trough of –189.2 % in 2019, reflecting the sector's powerful export orientation (Net import reliance). Export propensity (exports as a percentage of production value) soared from 38.7 % to 78.8 %, highlighting the sector's increasing reliance on foreign markets (Export propensity).

2. Shifting partner dynamics and price shocks reshape import patterns

2.1 Exports reorient towards the United States and China, while Japan stagnates

The United States remained the top destination, with export value jumping from EUR 948.1 million to EUR 2,461.9 million (+159.7 %). China emerged as a major growth pole: exports rose from EUR 207.1 million to EUR 689.8 million (+233.1 %). Exports to the United Kingdom grew by 38.6 % to EUR 682.5 million, while those to Japan advanced only 7.3 % (Top export partners).

Export partner	2015 (million EUR)	2025 (million EUR)	Change
United States	948.1	2,461.9	+159.7 %
United Kingdom	492.5	682.5	+38.6 %
China	207.1	689.8	+233.1 %
Japan	279.7	300.2	+7.3 %
Russian Federation	224.0	313.6	+40.0 %

2.2 Imports diversify but the United States and China remain key, while Russia vanishes

On the import side, the United States remained the leading supplier (EUR 694.3 million in 2025, +55.3 %). Imports from China grew by 83.2 % to EUR 130.7 million, and those from Türkiye and Tunisia surged by 291.0 % and 211.9 % respectively. Imports from the Russian Federation collapsed from already negligible levels to just EUR 12,041, a drop of 77.8 %, following extreme price distortions (Top import partners).

The Hirschman-Herfindahl Index (HHI) for imports declined from 2,069 to 1,573 (–24.0 %), signalling increasing diversification, while export HHI rose from 817 to 1,364 (+66.8 %), pointing to greater concentration of sales (Concentration HHI).

2.3 Price volatility and shock events ignite risk on several bilateral flows

The most severe price shocks hit imports from the Russian Federation and the United Kingdom. The Russian import price jumped by 27,151 % in 2021, albeit on tiny volumes, driven by a near-total cessation of normal trade after sanctions. In 2022, the UK import price spiked by 661.9 % as quantities plummeted, reflecting post-Brexit adjustment and perhaps re-export of high-value goods (Price shocks). On the export side, Russia experienced a price shock of +46.4 % in 2022, with continued elevated unit values thereafter.

Volatility (measured by the coefficient of variation of import volumes) was exceptionally high for Russia (1.63) and the United Kingdom (0.78), underlining the instability of these channels (Volatility bars). By contrast, exports to all major partners exhibited much lower volatility, with the United States at 0.28 and China at 0.30, suggesting a stable export supply.

3. Structural transformation: concentration, specialisation, and production momentum

3.1 Member-state specialisation reveals a core of highly competitive exporters

In 2025, Ireland held the highest revealed comparative advantage (RCA of 3.86) for CN 3006 products, followed by Lithuania (3.14), Cyprus (2.96), Hungary (2.39) and Belgium (1.83) (Most specialised reporters). At the other end, Malta, Romania and Portugal show very low or negative specialisation, with RCAs well below 0.2.

Reporter	RCA (2025)	RSCA (2025)	Share of EU exports
Ireland	3.86	0.59	8.1 %
Lithuania	3.14	0.52	1.9 %
Cyprus	2.96	0.50	0.1 %
Hungary	2.39	0.41	6.4 %
Belgium	1.83	0.29	15.5 %

The top exporting member states overall are Germany (EUR 1,855.4 million in 2025, +12.6 %), the Netherlands (EUR 1,712.7 million, +201.5 %) and Belgium (EUR 1,281.0 million, +79.6 %). Together, they accounted for the bulk of EU extra-bloc exports (Top reporters).

3.2 EU production value rises sharply, reinforcing the export-led model

The value of EU production of these goods climbed from EUR 5,394.3 million in 2015 to EUR 8,262.0 million in 2024, a substantial increase that supports the high export propensity. This growth occurred alongside a strengthening of specialisation in countries with strong pharmaceutical and medical device clusters (Production value).

3.3 Product segments reveal the engines of export expansion

The export basket is diversified, but three segments dominate:

- **Diagnostic reagents and opacifying preparations (300630):** exports grew from EUR 1,149.6 million to EUR 1,743.9 million.
- **Chemical contraceptive preparations (300660):** from EUR 1,467.2 million to EUR 2,194.9 million, the single largest export category.
- **Sterile surgical sutures, adhesives and haemostatics (300610):** from EUR 697.6 million to EUR 1,297.3 million.
- **Dental and bone reconstruction cements (300640):** from EUR 446.0 million to EUR 1,026.9 million.

Imports are led by 300610 (EUR 597.6 million to EUR 818.0 million) and 300640 (EUR 305.0 million to EUR 524.6 million), but the growth rates are far below those of exports, confirming the surplus-driven trend (Product segment breakdown).

Conclusion

Between 2015 and 2025, the EU has solidified its position as a global net exporter of CN 3006 pharmaceutical preparations. A robust expansion of exports, underpinned by growing production and favourable price dynamics, has dramatically widened the trade surplus. The export base has become more concentrated both by partner (especially the US and China) and by member state (with a handful of highly specialised countries). Imports, though rising in volume, have diversified and are subject to heightened volatility from geopolitical and regulatory shocks, most visibly from Russia and the United Kingdom. The strong net-import reliance and high export propensity underscore the sector’s outward orientation, which, while a source of strength, also ties it closely to global demand and the stability of key bilateral relationships.

Generated on 2026-07-28 based on data from tradedashboard.eu

Auto-generated report: it accelerates, and sometimes misleads, human analysis. It cannot replace it in full.

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.