EU TRADE EXPLORER

Market evolution: Plastics and plastic articles (CN 39) — 2015–2025

Introduction

This report examines the extra-EU trade of "plastics and articles thereof" (CN 39) between 2015 and 2025. The analysis is based on the EU trade dashboard for plastics and covers 11 full years. Over the decade the EU's position evolved from a comfortable net exporter towards a much smaller surplus, driven by diverging volume and price trends, shifting partner dependencies, and strong segment-level restructuring. The data reveal how price shocks, geopolitical disruptions and domestic policy priorities re-shaped one of Europe's most integrated industrial value chains.

1. A shrinking trade surplus: import growth outpaces an export volume decline

The value of exports rose, but the physical volumes shipped outside the EU fell markedly

Between 2015 and 2025 the extra-EU export value of plastics increased from €60.1 billion to €70.7 billion (+17.7 %), whereas the exported tonnage dropped from 24.2 million tonnes to 20.5 million tonnes (−15.4 %). This divergence was entirely driven by a sharp rise in unit values, which climbed from €2 483 per tonne to €3 454 per tonne (+39.1 %).

Trade flow	Indicator	2015	2025	Change (%)
Exports	Value (€ bn)	60.1	70.7	+17.7
Exports	Quantity (m t)	24.2	20.5	−15.4
Exports	Unit price (€/t)	2 483	3 454	+39.1
Imports	Value (€ bn)	39.7	61.2	+54.3
Imports	Quantity (m t)	15.8	23.6	+49.8
Imports	Unit price (€/t)	2 515	2 590	+3.0
Balance	Surplus (€ bn)	20.4	9.5	−53.5

Source: Overview – trade.

Import growth was both value- and volume-driven, especially from Asia and Türkiye

Imports climbed far faster than exports, reaching €61.2 billion in 2025 (+54.3 %) on a 49.8 % increase in tonnage. The strongest absolute growth came from China (from €7.3 bn to €16.3 bn, +125.2 %) and Türkiye (from €1.9 bn to €4.6 bn, +136.6 %). Imports from the United States (+51.3 %) and Korea (+72.8 %) also expanded significantly, while those from the United Kingdom contracted by 8.1 %.

The trade surplus halved, eroding the EU's traditional net-exporter status

The balance fell from a €20.4 billion surplus in 2015 to only €9.5 billion in 2025 (−53.5 %). As a share of total trade, the EU moved from a clear net-export position toward near-balance, foreshadowed by a rise in net-import reliance from −12.8 % to −5.3 % (an increase of 58.5 % in the negative dependence indicator).

2. Price shocks and geopolitical disruptions re-configure partner dependencies

The 2021-2022 period brought exceptional price spikes across several key partners

Detected shock events reveal abrupt price increases: import prices from Egypt jumped 35.1 % in 2021, from Türkiye 24.7 % in 2022, and from Saudi Arabia 34.3 % in 2021. On the export side, EU prices to Mexico surged 32.5 % in 2022, to Ukraine 18.1 % in 2021, and to Türkiye 28.2 % in 2021. These shocks coincided with post-pandemic supply tightness and the energy-price surge following Russia's invasion of Ukraine.

Instability was also visible in the high quantity volatility of imports from Viet Nam (CV = 0.57), Egypt (0.36), Türkiye (0.32) and China (0.31), while EU exports to Russia showed the highest variability (CV = 0.56) because of sanctions-induced collapse.

Exports to the Russian Federation collapsed, re-directing trade flows

EU exports of plastics to Russia fell from €3.4 billion in 2015 to only €0.45 billion in 2025 (–86.7 %). This dramatic drop, concentrated after 2022, removed a top-7 destination and forced EU exporters to shift volumes elsewhere. The export partner concentration (HHI) decreased from 770 to 718 (−6.8 %), suggesting some diversification as trade was redirected.

Import sources became more concentrated, with China and Türkiye gaining share

In contrast, import concentration increased: the HHI rose from 1 093 to 1 260 (+15.3 %). China alone accounted for about 27 % of extra-EU plastics imports in 2025, up from roughly 18 % in 2015. Türkiye, the United States and Korea also captured larger shares, while the United Kingdom’s weight diminished.

3. Structural shift: the EU imports more primary polymers and exports less waste

Imports of ethylene and propylene polymers surged while EU exports of the same materials declined

Looking at the product segment breakdown, imports of “Polymers of ethylene, in primary forms” (3901) grew from 3.8 million tonnes to 5.2 million tonnes (+38.7 %), whereas EU exports of the same heading fell from 3.7 million tonnes to 3.0 million tonnes (−19.7 %). A similar pattern holds for propylene polymers (3902): imports up 46.7 % in volume, exports down 20.6 %. The EU is therefore becoming a net importer of several basic plastic resins.

Waste and scrap exports dropped dramatically, reflecting circular economy policies

Exports of “Waste, parings and scrap, of plastics” (3915) shrank from 2.5 million tonnes to 1.5 million tonnes (−42.1 %) as stricter EU waste shipment rules and import bans in major Asian destinations took effect. The unit value of this waste stream also fell from €333 per tonne to €245 per tonne, indicating lower-value destinations or quality mixes.

Packaging articles and high-value finished goods remained resilient

Amid the volume declines in primary forms, exports of “Articles for the conveyance or packaging of goods, of plastics” (3923) increased in quantity from 1.2 million tonnes to 1.5 million tonnes (+22.5 %), while their unit price rose from €3 758 per tonne to €4 528 per tonne (+20.5 %). Similarly, imports of the same packaging category expanded by 26.8 % in volume. This segment’s dynamism reflects robust demand for downstream plastic articles, where EU producers still retain a competitive edge.

HS4	Description (short)	Export quantity change (%)	Import quantity change (%)
3901	Ethylene polymers	−19.7	+38.7
3902	Propylene polymers	−20.6	+46.7
3915	Plastic waste/scrap	−42.1	—
3923	Packaging articles	+22.5	+26.8

Source: Product segment breakdown.

Conclusion

The EU's plastics trade over 2015-2025 can be summarised as a journey from a broad surplus to a much narrower one, underpinned by a structural shift from exporting primary polymers to importing them, while absorbing massive price shocks and geopolitical re-alignments. The value of trade rose substantially on both sides, but the export volume contracted and the import volume swelled. Dependence on suppliers such as China and Türkiye deepened, import concentration increased, and the surplus halved. Waste exports collapsed, while downstream packaging goods offered a bright spot. These trends point to a European plastics industry that is still large but increasingly reliant on foreign feedstocks and finished goods, with its traditional trade-surplus cushion significantly eroded.

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