Market evolution: Printed books and manuscripts (CN 49) — 2015–2025

Introduction

This report examines the European Union's extra-EU trade in **CN 49 "Printed books, newspapers, pictures and other products of the printing industry; manuscripts, typescripts and plans"** from 2015 to 2025. The product group covers a wide range of printed matter, from traditional books and newspapers to children's picture books, postcards, calendars, banknotes and decalcomanias (Scope & definitions). The EU has consistently been a net exporter of these goods, but the decade has seen a profound reshaping of trade flows: a sharp drop in physical volumes, a shift towards higher-value products, a realignment of trading partners and the emergence of new, highly specialised exporters among the Member States.

1. Divergent trends in value and volume: the "premiumisation" of EU printing trade

Export values held up despite a nearly 60 % collapse in tonnes shipped, as unit prices more than doubled.

While the value of EU exports of CN 49 goods fell by only 7.3 % (from €5.03 billion in 2015 to €4.66 billion in 2025), the exported tonnage plummeted by 57.6 % (from 939 thousand to 398 thousand tonnes). This divergence was entirely absorbed by a 118.8 % jump in the average export price, from €5.35 per kg to €11.71 per kg (General overview). Such a massive price increase signals a deliberate move away from low-value bulk printing towards more expensive, specialised items.

Import values increased modestly, with a smaller volume decline and a much more moderate price rise.

On the import side, the EU's bill grew by 9.8 % (from €3.17 billion to €3.48 billion) while the imported quantity shrank by 14.9 % (from 437 thousand to 372 thousand tonnes). Import unit prices rose by 29.1 %, from €7.26 per kg to €9.37 per kg. The asymmetry between the export and import price dynamics—+119 % versus +29 %—underlines that EU exporters have been far more successful in raising the unit value of their shipments than their foreign competitors.

Table 1 – Headline trade indicators, 2015 vs. 2025

Indicator	2015	2025	Change
Exports (€ billion)	5.03	4.66	–7.3 %
Export quantity (k tonnes)	939.3	397.9	–57.6 %
Export price (€/kg)	5.35	11.71	+118.8 %
Imports (€ billion)	3.17	3.48	+9.8 %
Import quantity (k tonnes)	437.1	371.9	–14.9 %
Import price (€/kg)	7.26	9.37	+29.1 %
Trade surplus (€ billion)	1.86	1.17	–36.7 %

Source: General overview

The shrinking trade surplus masks a deep restructuring: the EU ships fewer but much higher-value printed goods.

The trade surplus fell by 36.7 %, from €1.86 billion to €1.17 billion. The combination of falling volumes and rising prices indicates that the EU printing industry is abandoning commoditised, high-tonnage segments in favour of niche products with high added value, a trend that is visible across both imports and exports.

2. Geopolitical realignment and partner concentration: from traditional neighbours to distant markets

The United Kingdom, Switzerland and Norway have lost share in EU exports, while the United States has surged to become a leading destination.

Exports to the United Kingdom fell by 24.0 % (from €1.01 billion to €0.77 billion), to Switzerland by 17.0 % and to Norway by 49.4 %. In contrast, exports to the United States grew by 64.5 % (from €0.38 billion to €0.62 billion). The US overtook Norway and now ranks as the third-largest extra-EU market after Switzerland and the UK (Top partners). This re-orientation away from neighbouring European partners towards North America is one of the most striking geographic shifts of the decade.

On the import side, China has overtaken the United Kingdom as the top supplier, and other Asian partners are gaining ground.

Imports from China surged by 78.5 % (from €0.57 billion to €1.01 billion), making it the largest source of CN 49 goods entering the EU. Meanwhile, imports from the United Kingdom dropped by 25.7 % (from €1.40 billion to €1.04 billion). India and Bosnia and Herzegovina also recorded strong growth (+101.8 % and +139.7 % respectively), while imports from Hong Kong halved (–53.4 %). The concentration of import value (HHI) fell from 2 524 to 2 085 (–17.4 %), indicating a more diversified supplier base (Concentration).

Table 2 – Change in extra-EU trade value with selected partners, 2015 → 2025

Partner	Exports (€ m)	Change	Imports (€ m)	Change
United Kingdom	1 012 → 770	–24.0%	1 399 → 1 040	–25.7%
Switzerland	1 171 → 972	–17.0%	–	–
Norway	363 → 184	–49.4%	–	–
United States	379 → 625	+64.5%	436 → 514	+18.0%
China	–	–	567 → 1 011	+78.5%
India	–	–	23 → 47	+101.8%
Bosnia & Herz.	–	–	15 → 35	+139.7%

Source: Top partners

The collapse of the Russian market and heightened volatility in other partners illustrate the impact of sanctions and geopolitical shocks.

Exports to the Russian Federation collapsed by 89.3 % (from €180 million to €19 million), a direct consequence of EU sanctions after 2022. The volatility of export quantities to Russia (CV 0.83) is the highest among the top partners, and export flows to the United Kingdom (CV 0.54) and Norway (CV 0.42) also show above-average instability (Volatility). These patterns confirm that political events have left a deep mark on the EU's printing trade.

3. Specialisation and structural change: the rise of new export champions and product niches

Poland and Malta have emerged as fast-growing, highly specialised exporters, while traditional heavyweights Germany and France have lost ground.

Among the Member States, export values from Poland increased by 84.4 % (from €195 million to €360 million) and from Malta by 164.0 % (from €123 million to €325 million). Conversely, exports from Germany declined by 14.3 % and from France by 18.1 % (Top reporters). The revealed symmetric comparative advantage (RSCA) for 2025 puts Malta (0.64), Latvia (0.58), Estonia (0.39) and Poland (0.33) at the top, while Germany (–0.05) and France (+0.12) show only moderate or negative specialisation (Specialisation). This points to a relocation of export-oriented printing activity towards Central and Eastern Europe.

Within the product mix, newspapers and periodicals have plummeted, whereas high-value segments such as “printed matter n.e.s.” and banknotes/stamps have expanded significantly.

Exports of newspapers and periodicals (CN 4902) shrank from €599 million to €262 million (–56.1 %), reflecting the ongoing digitalisation of news media. In contrast, exports of “printed matter n.e.s.” (CN 4911) remained the largest segment, growing from €1.67 billion to €1.86 billion (+11.6 %), and unused postage/banknotes (CN 4907) rose from €366 million to €469 million (+28.1 %). On the import side, children’s books (CN 4903) more than doubled in value (from €125 million to €272 million) (Product breakdown). The product-level data clearly illustrate a shift away from periodicals and ordinary books towards high-value collector’s items, security prints and illustrated children’s literature.

Table 3 – Export value of major CN 49 sub-headings, 2015 vs. 2025

Sub-heading	2015 (€ m)	2025 (€ m)	Change
Printed matter, n.e.s. (4911)	1 667	1 860	+11.6 %
Printed books (4901)	1 785	1 705	–4.5 %
Newspapers, periodicals (4902)	599	262	–56.1 %
Unused stamps, banknotes (4907)	366	469	+28.1 %
Postcards, greeting cards (4909)	83	57	–31.2 %
Calendars (4910)	47	40	–16.8 %
Children’s books (4903)	31	31	–0.7 %

Source: Product breakdown

Price shocks in US imports and Moroccan exports underline the market’s sensitivity to sudden shifts in supply and demand.

The data reveal two notable price shock events. A 28.2 % jump in the unit price of US imports to the EU occurred in 2022, accompanied by a temporary volume spike, and the price remained elevated afterwards (Shock events). On the export side, a 78.6 % price surge hit the Moroccan market in 2021 while volumes halved, pointing to a severe supply-side disruption. Such sharp adjustments, even in relatively small partner markets, highlight the vulnerability of trade in printed goods to logistical bottlenecks and shifting demand patterns.

Conclusion

The EU’s trade in printed books, newspapers and other printing-industry products has undergone a profound structural transformation between 2015 and 2025. Physical volumes have fallen dramatically, but the EU has compensated by moving up the value chain, as reflected in soaring unit prices and a growing focus on high-value product segments such as security prints and specialised printed matter. Geopolitical realignment—the weakening of traditional European partners, the rise of China and the United States, and the virtual disappearance of the Russian market—has reshaped the map of extra-EU trade. Inside the Union, new specialised exporters, notably Poland and Malta, have gained prominence, while Germany and France have lost market share. Overall, the sector has traded volume for value, re-orientated its commercial geography and demonstrated the agility to thrive in a rapidly changing global environment.

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