Market evolution: Processed fruits and vegetables (CN 20) — 2015–2025

Introduction

EU trade in “Preparations of vegetables, fruit, nuts or other parts of plants” (CN code 20) has undergone a profound transformation between 2015 and 2025. The product group encompasses everything from tomato purée and frozen vegetables to fruit juices and jams. Over the last decade the European Union not only scaled up its exports dramatically but also reoriented its trading relationships, diversified its sources of imports, and strengthened its position as a global producer. This report analyses the main dynamics behind those changes, relying exclusively on the data provided.

1. A widening trade surplus built on price inflation and robust extra-EU demand

EU exports of processed fruits and vegetables expanded by 75% in value over the decade, far outpacing the modest 14% increase in volume

In 2015 extra-EU exports stood at €7.43 billion and reached €13.01 billion in 2025, a jump of 75.2 %.General Overview

Volume moved from 6.58 million tonnes to 7.51 million tonnes (+14.1 %), meaning that the bulk of the value gain came from a sharp rise in average unit prices—from €1 128/t to €1 733/t (+53.6 %). The combination of strong external demand and the EU’s capacity to command higher prices has been a powerful driver of the trade surplus.

Import growth was subdued in volume terms while import prices also climbed, reinforcing the trend toward a larger surplus

Imports rose from €6.09 billion to €8.01 billion (+31.6 %), yet imported quantities actually fell from 4.22 million tonnes to 4.02 million tonnes (–4.9 %).General Overview

The import unit price climbed from €1 441/t to €1 994/t (+38.4 %). Because export volumes grew while import volumes shrank, the EU’s trade balance in this category has been transformed.

Indicator (year 2015 → 2025)	Exports	Imports	Balance
Value (billion EUR)	7.43 → 13.01	6.09 → 8.01	+1.34 → +5.00
Volume (million tonnes)	6.58 → 7.51	4.22 → 4.02	–
Unit value (EUR/t)	1 128 → 1 733	1 441 → 1 994	–

The trade surplus expanded by 272.7 %, from €1.34 billion in 2015 to a peak of €5.90 billion in 2024, before settling at €5.00 billion in 2025. The EU has thus become a much more significant net exporter of processed plant-based products.

2. Reorientation and diversification: shifting partner landscapes and import price shocks

The United Kingdom remained the top export destination and grew further, while post-Brexit UK shipments to the EU collapsed

EU exports to the UK rose from €2.69 billion to €4.08 billion (+51.7 %), making it by far the largest customer throughout the period.Top Partners

In contrast, EU imports from the UK dropped from €0.59 billion to €0.34 billion (–42.0 %), a clear consequence of the UK's exit from the single market. The UK's weight on the import side shrank markedly, contributing to the overall diversification of EU suppliers.

Exports to the United States more than doubled, while the Russian market shrank, underlining a geopolitical reorientation

Shipments to the US grew from €0.95 billion to €2.13 billion (+124.7 %), turning the US into the second most important destination. Other advanced markets such as Japan (+58.9 %), Australia (+101.5 %), and Saudi Arabia (+69.7 %) expanded solidly.

Deliveries to Russia, by contrast, fell from €0.38 billion to €0.28 billion (–24.3 %) amid sanctions and trade restrictions. Volatility of exports to Russia was the highest among major partners (coefficient of variation 0.31), reflecting repeated disruptions.Volatility & Shocks

On the import side, reliance on traditional partners such as Brazil stabilised, while Türkiye, China, and India gained ground

Brazil remained the leading supplier, with imports virtually flat at €1.16 billion → €1.21 billion (+4.4 %).Top Partners

Türkiye's shipments rose from €1.40 billion to €1.71 billion (+22.2 %), China from €0.47 billion to €0.66 billion (+40.6 %), and India more than doubled its presence from €0.11 billion to €0.25 billion (+125.7 %).

Overall import concentration (HHI) fell from 1 144 to 877 (–23.4 %), signalling a healthier, less concentrated supply base.Concentration

A series of import price shocks hit in 2022, notably from Costa Rica, Peru, and China

The data reveal clear price anomalies centred on 2022. The most extreme was an import price shock from Costa Rica (+41.1 % shift, abnormality score 11.6), followed by Peru (+19.5 %, abnormality 10.5) and China (+34.8 %, abnormality 5.0).Top Shock Events
These spikes affected fruit juices and preserved fruit, categories in which those countries are important. Post-shock prices remained elevated, contributing to the overall unit-value inflation observed on the import side.

3. Built on strength: EU production scale, specialisation, and high-value product segments

EU production of processed plant products has grown massively, with value increasing far more than volume

Between 2015 and 2024 domestic production quantity rose from 29.65 billion kg to 33.80 billion kg (+14.0 %), while production value surged from €34.54 billion to €58.91 billion (+70.6 % over that window; the full series since 2003 shows increases of 150.2 % in volume and 329.4 % in value).Production Volumes
This points to a strong shift toward higher-value processing, premiumisation, and the effects of input cost inflation being passed through.

Southern EU Member States and the Benelux countries are the most specialised exporters

Revealed comparative advantage (RCA) scores for 2025 show that Greece (RCA 5.09), Spain (1.80), Belgium (1.69), Italy (1.52) and the Netherlands (1.45) are the bloc’s most specialised exporters in this chapter.Specialisation
These countries account for a disproportionately large share of extra-EU exports, particularly Italy (€2.51 billion in 2025), the Netherlands (€2.11 billion) and Spain (€1.96 billion).

Frozen vegetables, prepared tomatoes, and fruit juices are the backbone of extra-EU trade

On the export side, frozen vegetables (CN 2004) grew from €1.48 billion to €3.58 billion and prepared/preserved tomatoes (CN 2002) from €1.07 billion to €1.74 billion by 2025. Fruit juices (CN 2009) reached €2.23 billion in exports and remained the biggest import segment at €2.91 billion.Product Segment Breakdown

The strong performance of higher-value processed goods (e.g., preserved vegetables, tomato preparations, juices) underscores the EU's competitive edge in quality and brand-based products.

Conclusion

Over the 2015–2025 window, EU trade in processed vegetables, fruit, nuts and other plant parts shifted decisively towards a large and growing surplus. Export value expanded by three-quarters, driven more by rising unit prices than by volume, while import volume actually contracted. The EU leveraged its domestic production scale—where output value nearly doubled—and the specialisation of its Mediterranean and Benelux members to dominate key high-value segments. Simultaneously, the partner landscape changed: the US and UK became even bigger customers, the UK's role as a supplier faded, and imports diversified toward Türkiye, China and India. The 2022 import price shocks from Costa Rica, Peru and China illustrate supply-side vulnerabilities, but the overall picture is one of strengthening export competitiveness and greater trade resilience.

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

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