Market evolution: Rubber and rubber articles (CN 40) — 2015–2025

Introduction

The European Union's external trade in rubber and rubber articles (CN 40) underwent a profound transformation between 2015 and 2025. A sector that started the period with a modest surplus ended it with a sizeable deficit, as import growth far outpaced exports. The decade was marked by a series of major disruptions – the COVID-19 pandemic, the UK's exit from the single market, Russia's war against Ukraine, and the subsequent sanctions – that redrew the geography of suppliers and customers alike. This report distils the main dynamics from the available data, highlighting the erosion of the trade balance, the realignment of partner relations, and notable shifts inside the product basket.

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1. The Great Reversal: From Trade Surplus to Persistent Deficit

EU imports of rubber and articles surged by 40.7 % in value over the decade, outpacing export growth of 20.3 %.

The headline figures tell a clear story of widening imbalance. While exports moved from €17.6 billion to €21.1 billion, imports jumped from €16.7 billion to €23.5 billion. The trade balance flipped from a surplus of €0.86 billion in 2015 to a deficit of €2.38 billion in 2025, with an extreme deficit of €4.24 billion recorded in 2021. Quantitative data show that import volumes (+14.1 %) rose more strongly than export volumes (+8.2 %), meaning the deficit has both a volume and a price component.

Year	Exports (€ bn)	Imports (€ bn)	Balance (€ bn)
2015	17.58	16.71	+0.86
2021	19.34	23.58	–4.24
2025	21.14	23.52	–2.38

Source: General Overview

A sharp price escalation on imports eroded purchasing power, widening the trade gap.

The unit price of EU imports rose by 23.3 % (from €3 075/t to €3 791/t), while the export price increased by only 11.2 % (from €4 045/t to €4 496/t). This adverse price development amplified the deficit, as the EU paid ever more for the same quantity of imported rubber goods while receiving a slower price increase for its exports. The underlying driver was partly a general commodity price inflation that hit raw materials such as natural and synthetic rubber more forcefully than the higher-value finished articles that dominate EU exports.

The EU's net import reliance more than doubled, indicating growing external dependency.

Net import reliance – the share of apparent consumption satisfied by non-EU suppliers – climbed from 2.7 % in 2015 to 7.2 % in 2024 and peaked at 8.4 % in 2022. At the same time, trade intensity (total trade as a share of domestic production) rose from 40.7 % to 60.9 %, and the export propensity jumped from 24.5 % to 41.6 %. The rubber sector thus became both more integrated into global value chains and more reliant on imports for its internal demand.

Net Import Reliance

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2. Geopolitical Tectonics: A Realigned Map of Suppliers and Customers

China cemented its position as the dominant import supplier, doubling its market share, while Türkiye rose to the second rank.

China's shipments to the EU soared from €2.72 billion to €6.18 billion (+127 %), making it by far the largest origin of rubber imports. Türkiye, already an important partner, grew by 74 % (€1.21 bn → €2.11 bn) and overtook several other players. Thailand (+68 %) and South Korea also expanded, while Indonesia (–12 %) and the United Kingdom (–54 %) lost ground. The import concentration (HHI) surged by 30.2 %, reflecting the growing dominance of a handful of Asian suppliers.

Import partner	2015 (€ bn)	2025 (€ bn)	Change
China	2.72	6.18	+127 %
Türkiye	1.21	2.11	+74 %
Thailand	1.03	1.74	+68 %
United Kingdom	2.37	1.10	–54 %
Russian Federation	0.95	0.009	–99 %

Top Partners

The collapse of trade with Russia and the post-Brexit recalibration with the United Kingdom reshaped bilateral flows.

Russia, which in 2015 supplied €0.95 billion of rubber goods, virtually vanished as an export destination and import source after 2022 (imports: €0.009 bn in 2025; exports: €0.10 bn from €0.81 bn). The United Kingdom, once the EU's largest export market, saw a steady decline: exports fell by 10.6 % (€3.21 bn → €2.87 bn) and imports halved, as the post-Brexit customs barriers and regulatory divergence redirected trade. Both Russia and the UK display the highest volatility coefficients among the top partners, underlining the disruptive nature of these political shocks.

Volatility Bars

The COVID-19 glove boom temporarily propelled Malaysia and distorted the import profile.

Malaysian imports skyrocketed from €1.03 billion in 2015 to a peak of €3.29 billion in 2021, driven overwhelmingly by demand for rubber gloves (heading 4015). This spike was unsustained: by 2025 the value had fallen back to €0.80 bn, underscoring the exceptional nature of the pandemic-driven surge and its distorting effect on partner rankings.

Exports to the United States and emerging markets like India and Morocco partly offset losses, reducing export concentration.

On the export side, the United States remained the top destination, growing by 33 % (€3.00 bn → €3.98 bn). Türkiye (+63 %), India (+66 %), and Morocco (+102 %) showed rapid expansion, while China (+13 %) remained a steady high-value market. Export concentration (HHI) dropped by 7.4 %, reflecting a healthy diversification of customer bases – a contrast to the rising import concentration.

Export partner	2015 (€ bn)	2025 (€ bn)	Change
United States	3.00	3.98	+33 %
United Kingdom	3.21	2.87	–11 %
China	1.40	1.59	+13 %
Türkiye	0.99	1.62	+63 %
India	0.33	0.54	+66 %
Morocco	0.25	0.51	+102 %

Concentration

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3. Inside the Product Basket: Tyres, Gloves, and a Surprising Waste Surge

New pneumatic tyres (4011) remained the backbone of both imports and exports, but experienced significant unit price inflation.

Tyres dominate the trade, accounting for the largest value share in both flows. Imports of tyres rose from €7.08 billion to €10.71 billion, with the average import price climbing from €3 701/t to €3 953/t. On the export side, tyre shipments even grew in value from €7.21 billion to €8.56 billion, with export unit prices surging from €4 802/t to €6 918/t. This strong "premiumisation" in the EU's tyre exports mirrors the shift towards higher-performance tyres, whereas imports became more expensive but remained predominantly in the mid-price range.

Product Segment Breakdown

The extraordinary spike in imports of rubber apparel and gloves (4015) during the pandemic was a one-off shock, now normalising.

Imports of clothing, gloves, and mittens (heading 4015) jumped from €1.46 billion in 2019 to €5.21 billion in 2021, driven by acute global demand for medical and protective gloves. Quantities rose from 299 thousand tonnes to 439 thousand tonnes, and the import price ballooned to almost €11 879/t in 2021 before collapsing. By 2025 the value had settled to €1.65 billion – close to pre-pandemic levels – showing that the market has fully absorbed the temporary shock.

EU exports of rubber waste and scrap (4004) soared, pointing to a new role as a global waste processor.

A striking development is the more than fourfold increase in exports of waste, parings, and scrap of soft rubber (4004): from 0.30 million tonnes in 2015 to 1.27 million tonnes in 2025. Although the monetary value remains modest (€73 million), the sheer volume makes the EU a significant supplier of recycled rubber feedstock to the world, likely reflecting stricter EU recycling mandates and a growing international market for secondary raw materials.

Domestic production contracted in volume while value held up, reflecting an ongoing “premiumisation” trend.

EU production of rubber articles fell from 3.69 million tonnes in 2015 to 2.85 million tonnes in 2024. Yet the production value rose from €22.8 billion to €26.2 billion, meaning the average factory-gate price increased from €6 189/t to €9 191/t. This pattern reinforces the picture of a sector moving up the value ladder: less massive but more valuable output. Member states such as Romania (RSCA 0.54), Luxembourg (0.61), and Malta (0.50) are highly specialised in rubber production, while large economies like Germany and Italy remain close to the European average.

Production Volumes

Conclusion

Over the 2015-2025 period, the EU rubber sector evolved from a balanced, surplus-generating activity into a structurally deficit-prone one, with imports, particularly from China, growing much faster than exports. Geopolitical ruptures – Brexit, the collapse of trade with Russia, the pandemic-driven glove boom – have redrawn the partner landscape, concentrating imports in a narrower set of Asian suppliers while diversifying export markets toward the Americas and Africa. Inside the product mix, high-value tyres remain the pillar of EU competitiveness, but the dramatic rise in waste rubber exports and the decline in domestic output volume signal structural shifts. The steep increase in import reliance and trade intensity highlights a growing vulnerability: the EU now depends more than ever on external suppliers for rubber inputs and finished articles. Continued monitoring of supplier concentration, price volatility, and strategic autonomy in this sector will be essential for future trade policy.

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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.