EU TRADE EXPLORER

Market evolution: Rubber articles (CN 4016) — 2015–2025

Introduction

Articles of vulcanised rubber (excl. hard rubber), n.e.s. constitute a broad, residual category within Chapter 40, bundling everything from gaskets and seals to floor coverings, cellular rubber goods, inflatable articles and erasers. Examining the European Union's extra-EU trade in these products between 2015 and 2025 reveals a striking transformation: export value surged by more than a third despite a shrinking tonnage, while import volumes expanded vigorously, reshaping the EU's partner landscape. This report distils the most prominent dynamics into three analytical sections, using the data provided by the dashboard.

1. The price-volume disconnect: how value outran tonnage

The headline numbers point to a clear decoupling of value and volume on both sides of the trade account.

Export revenue growth was propelled by unit-price increases, not by greater physical flows

EU exports of CN 4016 rose from €3,752,649,239.054 in 2015 to €5,161,016,351.28 in 2025, a **+37.5 %** gain. Over the same period the exported quantity fell from 319,832.906 tonnes to 288,191.209 tonnes (–9.9 %). Consequently, the average export price jumped from €11,732.53 to €17,906.38 per tonne (**+52.6 %**). The EU therefore earned far more while shipping fewer physical goods, reflecting a strong upgrade in the unit value of its rubber article exports.

Import growth was volume-heavy, with only a modest price contribution

On the import side, value climbed from €2,186,107,277.525 to €3,381,314,952.794 (**+54.7 %**), accompanied by a quantity increase of 38.5 % (from 300,597.222 to 416,296.17 tonnes). Import prices rose by a comparatively mild 11.7 %, from €7,272.34 to €8,122.01 per tonne. Thus, while import value expansion outpaced that of exports, it was largely driven by a bigger physical inflow rather than by escalating prices.

The trade surplus widened, but its composition shifted

The trade balance remained positive throughout the decade, increasing from €1,566,541,961.53 to €1,779,701,398.49 (**+13.6 %**). The surplus was sustained by the high-value, high-price nature of EU exports, even as import volumes caught up.

Indicator	2015	2025	Change
Exports (€)	3,752,649,239.054	5,161,016,351.280	+37.5 %
Exports (tonnes)	319,832.906	288,191.209	–9.9 %
Export price (€/t)	11,732.53	17,906.38	+52.6 %
Imports (€)	2,186,107,277.525	3,381,314,952.794	+54.7 %
Imports (tonnes)	300,597.222	416,296.170	+38.5 %
Import price (€/t)	7,272.34	8,122.01	+11.7 %
Trade balance (€)	1,566,541,961.529	1,779,701,398.486	+13.6 %

Source: General overview of EU trade in CN 4016

2. Partner realignment: Asia’s rise and the fading of traditional ties

The map of the EU’s main trading partners for rubber articles has been thoroughly redrawn over the period.

China cemented its role as the top import supplier, while the United Kingdom’s importance declined

Among extra-EU import sources, China saw its shipment value more than double, from €435,913,383.09 to €910,407,369.78 (**+108.9 %**), making it the undisputed number one. In contrast, imports from the United Kingdom shrank from €275,031,173.33 to €249,732,675.38 (**–9.2 %**), as post-Brexit trade frictions and supply-chain reconfiguration took effect. Other Asian suppliers also posted strong gains: India (+94.4 %), Thailand (+44.5 %) and, to a lesser extent, the Republic of Korea (+13.2 %).

The United States became the most dynamic export market, while Switzerland and Türkiye surged as buyers

On the export side, the United States strengthened its position, with sales expanding from €624,785,695.73 to €909,314,380.74 (**+45.5 %**). The United Kingdom remained the largest single destination in value terms but recorded a modest decline from €558,934,466.17 to €528,510,443.82 (**–5.4 %**). Notable growth was recorded for Switzerland (+73.4 %) and Türkiye (+64.0 %), as well as for Morocco (+47.2 %) and Mexico (+46.5 %). Exports to

China grew by 27.5 %, though not keeping pace with the much faster import growth from the same partner.

Partner (imports)	2015 (€)	2025 (€)	Change
China	435,913,383.09	910,407,369.78	+108.9 %
Türkiye	345,573,944.59	494,201,366.19	+43.0 %
India	121,043,742.66	235,341,322.57	+94.4 %
United Kingdom	275,031,173.33	249,732,675.38	–9.2 %

Source: Top trading partners for CN 4016

Export destinations diversified, while import sources became slightly more concentrated

The Herfindahl-Hirschman index for imports rose from 1,139.2 to 1,298.7 (+14.0 %), indicating that a few suppliers (notably China) account for a larger share. Conversely, the export HHI fell from 841.8 to 754.4 (–10.4 %), signalling that the EU spread its sales across a wider set of destinations.

3. The specialisation engine: high-value seals, regional clusters and the Ukraine shock

Behind the aggregate figures, the composition of trade and the geography of production within the EU provide deeper insights into the dynamics at play.

Gaskets and seals are the backbone of the surplus, while lower-value articles dominate imports

The sub-heading 401693 (Gaskets, washers and other seals) is the single most valuable export segment. Its exports grew from €1,488,849,657.43 to €2,111,080,633.99, and its unit price soared from €20,381 per tonne to €32,664 per tonne (+60.3 %). Together with the residual heading **401699**, it accounted for the bulk of the EU's export value. Imports of the same gaskets also increased, but at a far lower average price (€19,402 per tonne in 2025). This exchange of high-priced, high-specification EU-made seals for more generic imported rubber goods underpins the persistent trade surplus.

Sub-heading	Export value 2015 (€)	Export value 2025 (€)	Export price 2015 (€/t)	Export price 2025 (€/t)
401693 (gaskets, seals)	1,488,849,657.43	2,111,080,633.99	20,381.39	32,663.52
401699 (other vulcanised rubber)	2,026,962,238.72	2,669,320,665.78	10,460.21	15,620.13
401691 (floor coverings, mats)	92,222,449.74	120,021,686.73	2,794.00	3,717.02

Source: Product segment breakdown for CN 4016

Production is concentrated in a handful of member states, with Eastern countries showing a strong revealed comparative advantage

In 2025, the specialisation indices highlight a distinct geography. Malta (RSCA 0.88), Romania (0.37), Poland (0.36) and Slovenia (0.23) are the most specialised in CN 4016 relative to their overall export baskets. Germany, while the largest exporter in absolute terms (€2,032,376,993 in 2025), shows only moderate specialisation (RSCA 0.06), indicating that rubber articles are just one component of its vast industrial portfolio. This suggests that the production of these rubber goods is increasingly clustered in Central and Eastern Europe.

The Ukraine shock exposed the price sensitivity of certain export flows

The volatility analysis reveals that EU exports to Ukraine experienced a notable price shock in 2022. With an abnormality score of 22.9, the unit price jumped by **30.1 %** while the exported quantity fell by 30.3 % compared to the 2020-2021 baseline. Even after 2022 the price remained elevated (€15,626 per tonne on average in 2023-2024), pointing to a lasting supply-side adjustment or a re-routing of higher-value goods. This episode underscores the vulnerability of specialised rubber article trade to geopolitical disruptions.

Conclusion

The EU's external trade in rubber articles (CN 4016) over 2015–2025 reveals a mature, high-value export sector that has successfully upgraded its product mix while facing growing import volumes from Asia. The surge in export unit prices—far outpacing import price inflation—allowed the trade surplus to widen despite shipping fewer tonnes. At the same time, the partner structure pivoted: China became the indispensable import source, the United Kingdom's role diminished, and the EU's export destinations diversified. Within the EU, a distinct specialisation in gaskets and seals, especially from Central and Eastern member states, drives the favourable trade balance. The 2022 price shock for exports to Ukraine serves as a reminder that such a specialisation-based surplus is not immune to sudden geopolitical events. Overall, the rubber articles sector has proven to be a resilient and strategically important element of EU manufacturing exports.

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