EU TRADE EXPLORER

# Market evolution: Soaps waxes and polishes (CN 34) — 2015–2025

## Introduction

This report examines the evolution of European Union external trade in Chapter 34 products – covering soaps, surface-active agents, lubricants, waxes, polishes, candles and dental preparations – from 2015 to 2025. Drawing on official trade flows, production data and detailed product-level breakdowns, it identifies the main dynamics behind a decade of strong value growth, shifting partner patterns and a marked structural upgrading of the product mix. All figures are taken directly from the EU trade dashboard.

## 1. Value over volume — how price-driven export growth reshaped EU trade

EU exports of CN 34 products expanded vigorously between 2015 and 2025, but the growth was almost entirely a price story.

### Export value surged 45 % while tonnage remained virtually unchanged

Total extra-EU exports rose from **€8.41 billion** in 2015 to **€12.21 billion** in 2025, an increase of **45.1 %**. Over the same period, the exported quantity edged up from **4.06 million tonnes** to **4.09 million tonnes**, a marginal **+0.8 %**. Consequently, the average export unit value climbed from **€2 073 per tonne** to **€2 984 per tonne**, a jump of **44.0 %** (see trade overview). The value growth is thus explained by higher prices rather than by increased physical shipments.

### Unit prices rose across all major product categories, led by lubricants and modelling pastes

The price-led trend is visible in every segment. Export prices for lubricant preparations (3403) soared from **€3 141** to **€5 074 per tonne** (+61 %), modelling pastes and dental preparations (3407) from **€6 835** to **€8 357 per tonne** (+22 %), and organic surface-active agents (3402) from **€1 661** to **€2 331 per tonne** (+40 %) (see product breakdown).

### The UK and the United States remain top destinations, but price increases were widespread

The leading export markets – the United Kingdom (up **34.5 %** to **€2.34 billion**) and China (up **38.4 %** to **€1.00 billion**) – recorded solid value gains. Exports to the United States, however, almost doubled, climbing **99.4 %** to **€1.06 billion**. This broad-based price appreciation signals both a favourable global market for EU chemical specialties and a shift towards higher-quality, higher-margin products (see partner-level data).

## 2. Geopolitical realignments spur import diversification and partner shifts

While exports grew on the back of prices, the import side experienced a profound reconfiguration of supply sources, partly reflecting geopolitical tensions and the post-pandemic reorganisation of supply chains.

### China, Türkiye and Serbia captured growing import shares as concentration fell sharply

Extra-EU imports advanced from **€3.46 billion** to **€5.16 billion** (+**49.4 %**), with volumes rising **24.6 %**. The import Herfindahl-Hirschman Index (HHI) dropped from **2 192** to **1 451** (–**33.8 %**), indicating a much more diversified supplier base (see concentration data). Three partners stood out: imports from China surged **184.8 %** to **€0.83 billion**, from Türkiye **192.2 %** to **€0.37 billion**, and from Serbia a remarkable **680.8 %** to **€0.44 billion**. Meanwhile, traditional suppliers such as the United Kingdom remained stable (+**1.5 %** at **€1.37 billion**) and Switzerland grew modestly (+**13.7 %**).

### Exports to Russia collapsed while Ukraine and the US offset losses

The most dramatic partner shift occurred in exports. Shipments to the Russian Federation contracted by **57.1 %**, from **€635 million** to **€272 million**, reflecting sanctions and trade restrictions. The gap was more than filled by booming sales to the United States (+**99.4 %**) and Ukraine (+**173.5 %**, reaching **€0.34 billion**). Exports to Switzerland also climbed **47.0 %** to **€0.70 billion** (see top partners).

### The EU's net trade surplus widened, reinforcing its export-oriented structure

The trade balance in CN 34 products jumped from a surplus of **€4.96 billion** in 2015 to **€7.04 billion** in 2025 (+**42.1 %**). Net import reliance fell from **–12.1 %** to **–33.8 %** (a negative value denotes net exporter), while the export propensity shot up from **22.1 %** to **42.4 %**

(+**91.4 %**). The EU's soap and wax industry has become much more dependent on foreign demand, turning external trade into a major driver of production (see autonomy indicators).

## 3. Upgrading the product mix — production and trade move up the value chain

Behind the trade figures lies a clear industrial trend: the EU's output is shifting towards higher-value, more sophisticated formulations, a process visible both in production statistics and at the detailed product level.

### Domestic production value grew far faster than volume, signalling product upgrading

EU production quantity increased from **14.35 billion kg** to **20.76 billion kg** (+**44.6 %**), while production value rose from **€16.79 billion** to **€29.08 billion** (+**73.2 %**). The resulting unit value climbed by roughly **20 %**, confirming that EU manufacturers have been moving into more expensive product categories with higher added value (see production volumes).

### High-value segments like dental preparations and organic surface-active agents outpaced traditional soaps

Export values for the largest segment, organic surface-active agents and washing preparations (3402), grew by **46.5 %** to **€6.34 billion**, while lubricants (3403) grew by **17.2 %** and soap products (3401) nearly doubled to **€1.94 billion**. However, the fastest price growth came from modelling pastes and dental preparations (3407), where the unit value reached **€8 357 per tonne**, underlining the shift towards specialty chemicals. Even candles (3406) saw their average export price rise from **€2 683** to **€4 955 per tonne** (see product comparison).

### Poland and Belgium emerged as specialised powerhouses within the EU

Within the EU, the strongest revealed comparative advantage in CN 34 exports in 2025 was shown by Luxembourg (RSCA 0.297), Poland (0.239) and Belgium (0.225). Poland alone accounted for **10.8 %** of EU exports in this category and saw its export value jump **111.5 %** over the decade, while Belgium's export share stood at **13.4 %**. These countries, together with Germany and Italy, form the core of the EU's competitive production base in soaps, waxes and preparations (see specialisation map).

## Conclusion

Over the 2015–2025 period, EU trade in soaps, waxes and preparations underwent a remarkable transformation. Export growth was overwhelmingly driven by price effects, as the industry shifted towards higher-value segments and benefited from global chemical price trends, while physical volumes stagnated. On the import side, the EU diversified its sources dramatically, with China, Türkiye and Serbia gaining market share at the expense of concentration, and geopolitical disruptions caused a reshuffling of export destinations – Russia down, Ukraine and the US up. At the home base, production scaled up both in volume and especially in value, and the bloc's export orientation intensified sharply, turning the sector into a net export powerhouse. These dynamics suggest that EU competitive advantage lies increasingly in specialty, high-quality formulations, a trajectory that is likely to continue as global demand for sophisticated household and industrial preparations keeps rising.

---

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



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.