EU TRADE EXPLORER

Market evolution: Spices coffee and tea (CN 09) — 2015–2025

Introduction

Between 2015 and 2025, the European Union's trade in Coffee, Tea, Maté and Spices was marked by a profound value escalation that far outpaced volume growth. While import dependence deepened, the EU simultaneously strengthened its role as a high-value re-exporter. This report interprets the key dynamics visible in the data: the structural deterioration of the trade balance, the transformation of partner and product-mix patterns, and the price forces that reshaped the entire sector.

A Structural Trade Deficit Inflated by Rising Commodity Prices

The import value more than doubled while quantities grew only marginally, signalling a price-driven bill.

The EU's extra-EU import value for CN 09 rose from €10.4 billion in 2015 to €21.0 billion in 2025, an increase of 103.1 %. Over the same period, import quantity expanded by just 10.8 %, indicating that the surge in expenditure was overwhelmingly caused by rising unit prices, which climbed 83.3 %.

Overview of EU trade for CN 09

Indicator	2015	2025	Change
Imports (million €)	10 361	21 047	+103.1 %
Import quantity (t)	3 174 622	3 518 125	+10.8 %
Import price (€/t)	3 264	5 982	+83.3 %

The dominance of unroasted coffee and pepper amplified the sensitivity to global commodity price swings.

Within the import basket, coffee (CN 0901) represented the largest share by value, jumping from €8.6 billion to €18.7 billion. Pepper and capsicum (CN 0904, +5.5 %) and "other spices" (CN 0910, +80.8 %) also posted notable value increases, yet their combined weight remained far smaller. The import price of coffee alone rose from €3 133/t to €6 379/t.

Segment breakdown for imports of CN 09

The trade deficit more than doubled, reaching €16.5 billion in 2025, while export growth, though strong, could not close the gap.

Exports also recorded impressive nominal gains—climbing 96.9 % in value to €4.5 billion—but the absolute gap widened from –€8.1 billion to –€16.5 billion. Export quantities rose 21.0 % and export prices 62.7 %, confirming that EU exporters also moved up the value chain, albeit from a much smaller base.

Indicator	2015	2025	Change
Exports (million €)	2 290	4 507	+96.9 %
Export quantity (t)	425 827	515 157	+21.0 %
Trade balance (million €)	–8 072	–16 539	–104.9 %

Reshuffling Supply Sources and Growing Partner Concentration

Brazil and Viet Nam reinforced their position as the dominant origins, while Uganda’s role expanded dramatically.

The concentration of imports, measured by the Herfindahl-Hirschman Index (HHI), rose from 1 110 to 1 409 (+26.9 %). Brazil alone accounted for €6.5 billion of imports in 2025 (up 157.0 % from 2015), followed by Viet Nam at €3.3 billion (+139.1 %). Uganda experienced the most dramatic relative expansion, climbing 382.6 % to reach €1.3 billion, particularly in the later years of the window.

Top import partners for CN 09

Import partner	2015 (million €)	2025 (million €)	Change
Brazil	2 536	6 519	+157.0 %
Viet Nam	1 371	3 278	+139.1 %
Uganda	263	1 268	+382.6 %
Colombia	566	1 178	+108.1 %
Honduras	588	992	+68.7 %

On the export side, the partner base became more diversified, with a declining HHI and new destinations gaining weight.

Export concentration fell from an HHI of 1 132 to 852 (–24.7 %). While the United States and the United Kingdom remained the top markets, Ukraine and Russia stood out with growth rates of 246.9 % and 61.8 % respectively, albeit with some volatility. Exports to

India, a key spice producer itself, grew 102.3 % and were subject to a notable price shock in 2023.

Top export partners for CN 09

Export partner	2015 (million €)	2025 (million €)	Change
United States	470	807	+71.7 %
United Kingdom	507	790	+55.8 %
Switzerland	208	415	+99.7 %
Ukraine	68	236	+246.9 %
Russian Federation	154	250	+61.8 %

Transformative Dynamics in EU Exports and Domestic Production

EU exports shifted toward higher unit values, with roasted and processed coffee leading the upgrade.

Export unit prices for coffee (CN 0901) jumped from €5 797/t to €10 377/t, a far stronger increase than for imports. This points to the EU's strategic role as a processor and re-packager of coffee for premium markets. Tea (CN 0902) exports similarly achieved a high and rising unit value (€12 896/t in 2025), while the value of exports of spice seeds (CN 0909) rose 63.9 % with only a 28.2 % increase in volume.

Product breakdown for exports of CN 09

The most specialised EU reporters are small and medium economies that concentrate on processing and re-export.

In 2025, Bulgaria, Italy, and Lithuania displayed the highest revealed symmetric comparative advantage (RSCA) in extra-EU exports of CN 09. Italy's production share (14.4 % of EU output) significantly exceeds its share of total EU exports (8.0 %), confirming a strong competitive position. Germany remained the largest exporter in absolute terms (€1.2 billion) but with a lower RSCA than Italy or Bulgaria.

Export specialisation map for CN 09

Domestic EU production value grew strongly despite a slight dip in volume, mirroring the broader price escalation.

EU production quantity decreased marginally (–1.7 % between 2015 and 2024), yet production value surged by 81.9 % to €15.9 billion. This indicates that the same price pressures affecting imports also raised the nominal value of EU-grown and processed goods, contributing to the steep increase in trade intensity (from 7.8 % to 26.9 %) and export propensity.

EU production volumes and values for CN 09

Conclusion

The decade to 2025 transformed the EU’s position in the coffee, tea, and spice sector. Extreme price inflation—especially in green coffee—pushed the import bill to unprecedented levels and deepened the structural deficit. At the same time, the Union as a whole, and a group of highly specialised member states in particular, successfully moved exports upmarket, achieving substantial gains in unit value and widening their customer base. The policy challenge ahead lies in managing the concentrated supply risk from a handful of tropical exporters while nurturing the high-value processing activities that give the EU its commercial edge.

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

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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.