EU TRADE EXPLORER

Market evolution: Spirits and liqueurs (CN 2208) — 2015–2025

Introduction

This report analyses EU external trade in undenatured ethyl alcohol of an alcoholic strength of less than 80 % vol, spirits, liqueurs and other spirituous beverages (CN 2208) from 2015 to 2025. The product grouping covers whiskies, rum, gin, vodka, liqueurs, Cognac/brandy and other spirit drinks. The EU is a global leader in this sector, and the data reveal significant shifts in trade balance, partner structure, product mix and exposure to exogenous shocks. All figures cited are drawn from the dashboard datasets referenced via the links below.

1. Surging export orientation and a widening trade surplus

The EU's net exporter position strengthened, with the trade surplus rising by 25 % to nearly €4 billion

Extra-EU exports of CN 2208 grew from €6.37 billion in 2015 to €8.31 billion in 2025 (+30.5 %), while imports increased from €3.17 billion to €4.32 billion (+36.2 %) Trade overview. As a result, the trade surplus widened from €3.20 billion to €4.00 billion (+25.0 %). The EU's net import reliance indicator remained negative and moved from –13.0 % in 2015 to –38.0 % in 2024, confirming the bloc's deepening export dependency in this category Net import reliance.

Export volumes surged while export unit prices fell, contrasting with higher import prices

Export quantities expanded faster than imports, rising 47.5 % (from 927 k tonnes to 1 368 k tonnes) against a 25.5 % increase in import quantities. However, the average export unit price dropped by 11.5 % (from €6 868 / tonne to €6 077 / tonne), while the import unit price rose by 8.5 % (from €5 073 / tonne to €5 503 / tonne) Trade overview. This suggests that rapid volume growth has been partly achieved at the expense of unit values, while imported products have become relatively more expensive, possibly reflecting a shift towards higher-value niche imports.

Production value grew much faster than volume, confirming a premiumisation trend

EU production volume (as recorded by Prodcom) expanded from 1 171 million litres in 2009 (the first available year) to 1 414 million litres in 2024 (+20.7 %). Over the same period, production value jumped from €8.22 billion to €15.86 billion (+93.0 %), lifting the implicit unit value from €7.02 / litre to €11.22 / litre Production volumes. The export propensity rose from 40.1 % to 55.2 % (2015–2024) Export propensity, underlining that the EU spirits industry is increasingly dependent on foreign markets while simultaneously moving up the value chain.

2. Geopolitical realignment and the diversification of trading partners

The United Kingdom remained the dominant import supplier, while the United States consolidated its lead as the top export market

Imports from the UK held steady at €2.24 billion in 2025, showing only mild growth (+14.4 %) despite Brexit. The United States, the second import source, almost doubled its shipments to the EU, from €618 million to €1 209 million (+95.8 %). On the export side, the US remained the foremost destination (€2.57 billion in 2025, +14.5 %), followed by the UK (€862 million, +37.5 %) and China (€608 million, +73.8 %) Top partners.

Flow	Partner	2015 (€ million)	2025 (€ million)	Change (%)
Imports	United Kingdom	1 957	2 239	+14.4
Imports	United States	618	1 209	+95.8
Imports	Mexico	92	233	+154.0
Imports	Ukraine	11.5	31.4	+172.9
Exports	United States	2 249	2 575	+14.5
Exports	United Kingdom	627	862	+37.5
Exports	China	350	608	+73.8
Exports	Philippines	68	173	+153.5
Exports	Ukraine	54.5	175	+221.6

Russian trade collapsed under sanctions, while Ukraine emerged as a rapidly growing partner

EU imports from Russia plummeted from €49 million to less than €0.2 million (–99.6 %), and exports to Russia, after peaking at €577 million in 2023, fell back to €365 million (–4.4 % over the decade). Meanwhile, both imports from and exports to Ukraine soared (+172.9 % and +221.6 %, respectively), indicating a re-orientation of east European trade links following the 2022 invasion Top partners.

Partner concentration declined on both sides, signalling a more diversified trade profile

The Herfindahl-Hirschman Index for imports eased from 4 220 to 3 534 (–16.3 %), and for exports from 1 552 to 1 268 (–18.3 %) Concentration HHI. This reflects a broadening of supply sources beyond the dominant UK-US duo, and a parallel spread of export destinations away from the traditional American, British and Chinese hubs, helped by the rise of markets such as Mexico, the Philippines, and several smaller partners.

3. A shifting product portfolio: from Cognac to whiskies, liqueurs and vodka

Exports of wine-based spirits (Cognac, brandy) fell sharply after 2022, while whiskies, liqueurs and vodka gained ground

Wine spirits (CN 220820), which are mostly high-value Cognac and brandy, saw their extra-EU export value collapse from a peak of €4.13 billion in 2022 to €2.41 billion in 2025, with volumes contracting from 207 k tonnes to 135 k tonnes Product segment comparison. Whiskies (CN 220830) exports rose from €914 million to €1 571 million, liqueurs and cordials (CN 220870) from €1 101 million to €1 712 million, and vodka (CN 220860) from €978 million to €1 116 million, partially offsetting the loss.

Product segment (export)	2015 (€ m)	2025 (€ m)	Change (%)
Wine spirits (220820)	2 803	2 412	–13.9
Whiskies (220830)	914	1 571	+71.9
Liqueurs (220870)	1 101	1 712	+55.5
Vodka (220860)	978	1 116	+14.1
Gin (220850)	68.9	189	+174.3

The shift away from Cognac likely reflects retaliatory tariffs, particularly the Chinese anti-dumping measures imposed on EU brandy in 2024, and ongoing US tariff disputes.

Imports were driven by liqueurs, gin and vodka, reshaping EU sourcing patterns

On the import side, liqueurs and cordials (CN 220870) registered the most dynamic value growth, from €136 million to €363 million (+167 %), with quantities doubling. Gin (CN 220850) imports increased from €205 million to €384 million, and vodka imports (CN 220860) from €118 million to €246 million Product segment comparison. Whisky remained the largest import subcategory (€2.22 billion in 2025), but its volume actually decreased, indicating that the value increase came entirely from higher unit prices (+25 %

over the period). The rising import prices for whiskies, liqueurs and gin underpin the premiumisation trend also seen on the production side.

Price shocks and volatility were most pronounced in US, Singapore and around supply-chain disruptions

A significant price shock was detected in EU exports to the United States in 2022, where the unit price jumped 26.1 % above baseline while volumes remained stable Shock events. Export price shocks were also recorded for Singapore (2021) and Switzerland (2020). Volatility of import quantities was highest for Russia (CV 0.71), Eswatini (CV 0.73) and the United States (CV 0.45), while the UK exhibited very stable import flows (CV 0.06) Volatility. These patterns mirror post-COVID logistics strains, shifts in consumer demand and geopolitical supply restrictions.

Conclusion

Over the decade 2015–2025, the EU spirits and liqueurs sector reinforced its global export powerhouse status, recording a trade surplus of €4 billion and a steep rise in export propensity. Production value soared, underpinned by premiumisation, even as average export unit prices declined due to rapidly expanding volumes. Geopolitical fractures, especially the war in Ukraine, reshaped trading relationships, with Russian flows collapsing and Ukraine emerging as a dynamic partner, while partner concentration diminished on both the import and export sides. The product composition is undergoing a notable transformation: high-value wine spirits exports have retreated sharply in the face of trade tensions, whereas whiskies, liqueurs, vodka and gin are filling the gap and driving both export and import growth. Future developments will depend on the resolution of trade disputes, the evolution of consumer tastes and the sector's ability to sustain its premium positioning.

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