EU TRADE EXPLORER

# Market evolution: Stone and plaster articles (CN 68) — 2015–2025

## Introduction

This chapter covers a broad array of mineral-based articles, ranging from worked natural stone, plaster and cement products to insulation wools, friction materials and advanced carbon-fibre components. The data cover EU trade with non-EU partners between 2015 and 2025 at annual frequency. The analysis draws on official trade flows, production estimates and specialisation indices from the EU Trade Dashboard.

## Value-driven trade surplus expands despite shrinking volumes

### Export values rose 21 %, while shipped tonnes fell 17 %, signalling a strong price effect

Overall trade figures reveal a clear decoupling between value and volume. Between 2015 and 2025 the value of extra-EU exports increased from €7 010 million to €8 491 million (+21.1 %), while the exported quantity shrank from 7 915 k tonnes to 6 568 k tonnes (−17.0 %). The resulting implied export price jumped from €886 to €1 293 per tonne (+46.0 %), underpinning the entire export gain.

| Indicator | 2015 | 2025 | Change |
|---|---|---|---|
| Export value (€ million) | 7 010 | 8 491 | +21.1 % |
| Export quantity (k tonnes) | 7 915 | 6 568 | –17.0 % |
| Implied export price (€/t) | 886 | 1 293 | +46.0 % |

### Import volumes stagnated, but higher unit costs pushed import value up 32 %

The import side shows a contrasting volume trend. Import value rose from €3 897 million to €5 158 million (+32.3 %), yet the imported quantity barely changed (+0.9 %). The implied import price therefore jumped from €815 to €1 070 per tonne (+31.2 %), indicating that higher global prices – rather than a surge in physical demand – were the main driver of rising import bills.

| Indicator | 2015 | 2025 | Change |
|---|---|---|---|
| Import value (€ million) | 3 897 | 5 158 | +32.3 % |
| Import quantity (k tonnes) | 4 781 | 4 822 | +0.9 % |
| Implied import price (€/t) | 815 | 1 070 | +31.2 % |

### Net surplus widened slightly, backed by growing export propensity and a persistently negative net-import-reliance ratio

The EU's trade surplus in CN 68 grew from €3 112 million to €3 333 million (+7.1 %). Over the same period the export propensity (extra-EU exports relative to EU production value) climbed from 9.2 % to 15.1 %, while the net-import-reliance ratio stayed negative (from −4.7 % to −6.2 %), confirming that the EU remained a solid net exporter throughout the decade.

## Geopolitical shocks reshape import sources and boost partner diversification

### Sanctions on Russia and Belarus caused near-total trade collapse, triggering supply and price shocks

The most dramatic disruptions appear on the import side. Imports from the Russian Federation plummeted from €77 million in 2015 to €1.5 million in 2025 (−98.1 %). A detected supply shock centred on 2024 shows a quantity collapse of −99.4 % accompanied by a price spike of +544 %. Imports from Belarus fell from €13.3 million to €1.0 million (−92.5 %). A price shock hit in 2023, with a unit-value jump of 220 % and an abnormality score of 6.8, signalling a sharp dislocation in low-volume, high-price flows.

### Türkiye, India and China filled the gap; Türkiye's import value surged 208 %

Several partners rapidly expanded their shipments to the EU. Imports from Türkiye jumped from €152 million to €468 million (+207.5 %). China (+30.3 %) and India (+31.8 %) also posted solid gains, keeping their positions as the largest and third-largest non-EU suppliers.

| Import partner | 2015 (€ million) | 2025 (€ million) | Change (%) |
|---|---|---|---|
| China | 1 062 | 1 385 | +30.3 |
| Türkiye | 152 | 468 | +207.5 |
| India | 277 | 365 | +31.8 |
| United Kingdom | 505 | 531 | +5.2 |
| Belarus | 13 | 1 | –92.5 |
| Russian Fed. | 77 | 1 | –98.1 |

### Export growth concentrated in the US, UK and Serbia, while HHI indices reveal import diversification but export concentration

On the export side, the United States and United Kingdom remained the top destinations, growing by 37.6 % and 26.7 % respectively. Serbia recorded a striking 150.9 % increase (from €46 million to €116 million), reflecting deepening regional integration.

The HHI concentration indices confirm that import sourcing became more diversified (HHI down 9.8 %), while export markets became slightly more concentrated (HHI up 17.5 %). This pattern matches the re-routing of imports away from high-risk suppliers and the strengthening of core export relationships.

## Advanced materials and insulation drive premiumisation of EU stone and plaster trade

### Carbon-fibre and other high-tech articles (6815) dominate both import and export values

Product segment data show that **6815 – Articles of stone or of other mineral substances, incl. carbon fibres** – is the single largest trade item. In 2025 it accounted for €1 405 million of imports and €1 565 million of exports, with per-tonne unit values of €6 839 and €6 717 respectively. The price of exported 6815 products rose from €5 033 to €6 717 (+33.5 %), reflecting growing demand for high-performance materials.

| Segment (CN 68 sub-heading) | Description | Import value 2025 (€ million) | Export value 2025 (€ million) |
|---|---|---|---|
| 6815 | Stone/mineral articles n.e.s., incl. carbon fibres | 1 405 | 1 565 |
| 6802 | Worked natural stone (monumental/building) | 1 009 | 1 800 |
| 6810 | Cement, concrete or artificial stone articles | 470 | 1 436 |
| 6806 | Mineral wools, insulation materials | 447 | 813 |

### Natural stone and cement articles remain volume-heavy but recorded sharp unit-value increases

Although volumes for **6802 (worked natural stone)** and **6810 (cement articles)** are high, their per-tonne prices have risen markedly. For exports, the implied unit value of 6802 increased from €863 to €1 331 (+54.2 %), and for 6810 from €391 to €601 (+53.9 %). Import prices also climbed: 6802 from €424 to €502 (+18.3 %), 6810 from €528 to €497 (−5.9 %, after a volatile period). These shifts underline a general move towards higher-quality, more processed stone products, partly driven by rising energy and transport costs.

### Insulation products (6806) saw price spikes linked to energy costs and construction demand, while EU production mirrors the value-up/volume-down pattern

The **6806 (mineral wools)** segment illustrates the impact of elevated energy input costs. Export unit value rose from €1 293 to €1 573 (+21.7 %) and import unit value from €1 499 to €1 663 (+11.0 %). EU production data for CN 68 as a whole show a similar phenomenon: between 2015 and 2024, output quantity fell by 17.6 % while production value rose by 45.1 %, exactly mirroring the trade pattern and confirming a structural shift towards higher-value goods.

## Conclusion

Over the 2015–2025 period, EU trade in stone and plaster articles strengthened its surplus through a pronounced shift towards higher unit values, even as physical volumes shrank. Geopolitical sanctions removed Russia and Belarus from the import map, prompting a rapid reorientation towards Türkiye, India and other partners, while export growth continued to concentrate on mature markets. The product mix increasingly favours carbon-fibre and insulation materials, whose high per-tonne prices drive overall trade growth. Together, these dynamics show an EU sector that is becoming more resilient, more premium-oriented, and more assertive in its global positioning.

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