Market evolution: Sugar and confectionery (CN 17) — 2015–2025

Introduction

The period 2015 to 2025 saw a profound transformation in the European Union's extra-EU trade in sugars and sugar confectionery. While the EU remained a net exporter throughout, the trade surplus widened spectacularly, export values soared, and the composition of trade shifted towards higher-value products. At the same time, geopolitical events, price shocks, and changing bilateral relationships redrew the map of supplier and buyer countries. This report describes and interprets these dynamics, relying exclusively on the data from the EU trade dashboard.

1. Export-Led Growth and a Record Trade Surplus

1.1 Export values soared by 69 % over the decade while import growth remained modest

Between 2015 and 2025, extra-EU exports of CN 17 rose from €2.98 billion to €5.03 billion, a jump of 69.2 %. Import values, on the other hand, increased by only 9.9 %, from €2.07 billion to €2.28 billion. As a result, the trade surplus ballooned from €0.90 billion to €2.76 billion – an increase of 205.3 %. The combined effect turned the EU into an ever more important net supplier of sugar-based products to the rest of the world.

Indicator	2015	2025	Change (%)
Extra-EU exports (€ bn)	2.975	5.034	+69.2
Extra-EU imports (€ bn)	2.072	2.276	+9.9
Trade balance (€ bn)	0.903	2.757	+205.3

Data source: EU trade overview.

1.2 A sharp decline in import volumes coupled with rising prices transformed the trade balance

The export value boom was predominantly price-driven: export quantities rose by only 8.9 % (from 3.37 million tonnes to 3.67 million tonnes), while the average export price climbed 55.3 %. Imports told a very different story: import volumes shrank by 31.0 % (from 4.35 million to 3.00 million tonnes), yet import prices grew by 59.3 %. The EU was therefore buying less sugar from abroad, but paying much more for it, while selling a broadly stable volume at substantially higher prices.

Flow	Quantity 2015 (kt)	Quantity 2025 (kt)	Change (%)	Price 2015 (€/t)	Price 2025 (€/t)	Change (%)
Exports	3 373	3 674	+8.9	882	1 370	+55.3
Imports	4 350	3 000	–31.0	476	759	+59.3

1.3 Concentration trends: More diversified export markets and stable import sources

The Herfindahl-Hirschman index (HHI) for the geographic concentration of exports fell from 1 182 in 2015 to 840 in 2025, a decline of 28.9 %. This signals a meaningful diversification of export destinations. The import-side HHI remained high and relatively stable, moving from 769 to 741 (–3.6 %), indicating that import sources stayed concentrated, although the composition of the top suppliers changed markedly (see Section 2).
See: Market concentration for Sugars and sugar confectionery.

2. Geopolitical Shocks Reshape Supplier and Buyer Landscapes

2.1 The war in Ukraine triggered a surge in Ukrainian sugar imports into the EU

Ukraine emerged as a pivotal import supplier. Its deliveries rose from €28 million in 2015 to €191 million in 2025 – an increase of 587.4 %. The most dramatic leap occurred between 2022 and 2023, when imports jumped from €289 million to €490 million, reflecting the EU's trade liberalisation measures. The volatility of this flow (coefficient of variation 0.91) underscores the shock-driven nature of the change.
Data: Top trading partners and Volatility of trade flows.

2.2 Brexit and price spikes: The United Kingdom's shifting role in EU sugar trade

The United Kingdom remained the top destination for EU exports, with sales rising from €0.88 billion to €1.12 billion (+26.8 %). However, the UK's role as an import source for the EU diminished substantially: imports fell from €465 million to €320 million (–31.3 %). A sharp price shock in 2021 contributed to this decline: the import unit price jumped from €1 063 per tonne in 2020 to €1 841 in 2021, while the volume collapsed from 355 kt to 104 kt, as shown in the Volatility & Shocks data.

2.3 Price shocks and volatility expose vulnerabilities in certain supply chains

Several partners experienced dramatic price or supply shocks that affected EU trade:

- **United States imports** suffered a price spike in 2021 (value share 4.0 %), with the unit price more than doubling.
- **Morocco imports** saw a price jump of 149 % in 2022 (value share 1.3 %).
- **Indian exports** recorded a 38 % upward price shift in 2022, while **Sri Lanka**, **Libya** and **Syria** faced export price shocks exceeding 300 % in some years – albeit with small market shares (≤ 0.6 %).
- **Cuban imports** virtually disappeared, dropping from €105 million in 2015 to just €75 thousand in 2025 (–99.9 %), with a coefficient of variation of 0.86.

These shocks highlight the sector's exposure to global commodity price movements and political instability.

3. From Bulk to Brand: The Premiumisation of EU Sugar Trade

3.1 Sugar confectionery dominates exports and drives value growth

Exports are overwhelmingly driven by high-value sugar confectionery (CN 1704), which accounted for €2.78 billion in 2025, more than half of total export value. The unit price of confectionery exports reached €5 005 per tonne, far above any other segment. Other sugars (CN 1702) and raw cane/beet sugar (CN 1701) added €1.08 billion and €1.02 billion, respectively, while molasses (CN 1703) remained a minor item (€56 million). The value growth of confectionery – from €1.42 billion in 2015 – exemplifies the EU's move towards branded, processed products.

Export segment	Value 2015 (€ M)	Value 2025 (€ M)	Price 2025 (€/t)
1704 – Confectionery	1 417	2 775	5 005
1702 – Other sugars	523	1 081	1 317
1701 – Raw/refined sugar	799	1 020	549
1703 – Molasses	28	56	143

Source: Product segment breakdown.

3.2 Raw cane sugar remains the main import, but volumes are shrinking

On the import side, cane and beet sugar (CN 1701) is the largest segment in value terms (€898 million in 2025), but its volume dropped from 2.89 million tonnes in 2015 to 1.62 million tonnes. The import unit price rose from €416 to €556 per tonne. Imports of sugar confectionery (CN 1704) reached €815 million in 2025, with a high unit price of €4 344 per tonne, while other sugars (CN 1702) contributed €397 million. The decline in bulk sugar imports reflects not only higher world prices but also the EU's own processing capacity and policy environment.

3.3 EU production value rises despite falling output, signalling a move up the value chain

EU sugar production (in volume) fell by 17.5 % between 2015 and 2024, from roughly 33.7 million tonnes to 27.8 million tonnes. However, the production value increased by 21.5 %, from €22.2 billion to €26.9 billion. This divergence points to a strong price effect and a shift toward higher-value products. The export propensity of the sector more than doubled, reaching 17.8 % in 2024, and net import reliance deepened to –9.6 %, meaning the EU is increasingly relying on its own value-added output to serve foreign demand.
See: EU production volumes and Export propensity.

Conclusion

The EU's sugar and sugar confectionery trade has undergone a decade of remarkable value creation, rising export prices, and shifting partner relations. The trade surplus grew more than three-fold, driven not by higher volumes but by a powerful price uplift and a strong orientation toward high-margin confectionery exports. Geopolitical developments – the war in Ukraine, Brexit, and supply-side shocks – radically altered sourcing patterns, with Ukraine and Brazil becoming critical suppliers while traditional partners like Cuba faded away. At the same time, the EU production base contracted in volume but expanded in value, underscoring a strategic pivot towards premiumisation and greater integration in global value chains. Looking ahead, the sector's resilience will depend on managing price volatility, securing diversified sourcing, and continuing to move up the value ladder.

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