EU TRADE EXPLORER

Market evolution: Tanning and dyeing materials (CN 32) — 2015–2025

Introduction

This report examines the European Union's external trade in products falling under customs code 32 – a broad heading covering tanning and dyeing extracts, dyes, pigments, paints, varnishes, mastics and inks. The analysis covers the 2015–2025 period, using annual data from the EU Trade Dashboard. Over this decade the EU has maintained a sizeable trade surplus, but the nature of that surplus changed markedly. Export revenues edged up despite a sharp drop in volumes, driven by a strong shift toward higher-value products. Meanwhile imports grew substantially, fuelled by rising volumes from more diversified – and on average cheaper – sources. Geopolitical events, notably the war in Ukraine and the UK's departure from the EU, reshaped partner relationships, while price shocks and diverging unit-value trends revealed deep structural adjustments within individual product segments.

A tale of two trade flows: export premiumisation meets import volume surge

Export values hold steady as volumes plummet, pushing unit prices to unprecedented levels

EU exports of CN 32 products rose only moderately in value, from €12.1 bn in 2015 to €12.9 bn in 2025 (+6.2%). However, the export tonnage contracted dramatically, falling from 4.1 million tonnes to 3.2 million tonnes (–23%). This disconnect is explained by a 37.9% increase in average unit prices, which climbed from €2,952 per tonne to €4,072 per tonne. In other words, the EU shipped fewer, but far more expensive, coatings, colorants and inks. The trend was particularly pronounced after 2021, when prices leapt upwards even as volumes declined further (see table below). The trade overview reveals that the export value peak was reached in 2022 (€14.7 bn), after which both value and quantity softened.

Table 1 – Headline EU trade in CN 32, 2015 vs. 2025

Indicator	2015	2025	Change (%)
Exports (billion EUR)	12.12	12.87	+6.2
Export volume (thousand tonnes)	4,104.4	3,160.6	–23.0
Export price (EUR/tonne)	2,952	4,072	+37.9
Imports (billion EUR)	6.28	7.64	+21.5
Import volume (thousand tonnes)	1,243.7	1,809.2	+45.5
Import price (EUR/tonne)	5,052	4,221	–16.5
Trade balance (billion EUR)	5.83	5.23	–10.3

Source: General Overview.

Import growth is overwhelmingly volume-driven, with falling unit costs reflecting a shift towards cheaper sources

Import values climbed from €6.3 bn to €7.6 bn (+21.5%), but even more striking is the 45.5% surge in import tonnage, from 1.2 million tonnes to 1.8 million tonnes. Import unit prices, by contrast, fell 16.5% (from €5,052 to €4,221 per tonne). This suggests that EU buyers increasingly sourced from lower-cost suppliers, benefiting from a broader and more competitive import base. Indeed, the Herfindahl-Hirschman Index for import partner concentration fell by 31.3%, indicative of a deliberate diversification away from traditional heavyweights such as the United Kingdom.

Geopolitical tremors and supply chain realignments

The collapse of trade with Russia and the reorientation towards other major partners

The most dramatic change in the EU’s export geography was the near-total disappearance of the Russian market following the full-scale invasion of Ukraine. EU exports to Russia plunged from €1.08 bn in 2015 to just €52.3 million in 2025 (–95.1%), while export volumes collapsed by 98% (see partner table). This shock was classified as a supply/price shock event in the dashboard’s volatility analysis, with export prices to Russia rocketing by 328% as the remaining tiny flows became high-value niche shipments.

The slack left by Russia was partly absorbed by sizeable increases in exports to the United States (+53.1%, reaching €1.58 bn in 2025) and to Türkiye (+34.5%, to €1.18 bn). China also grew modestly (+5.6%), while Norway and Switzerland posted moderate gains. The United Kingdom, despite remaining the largest single export destination, saw a steady erosion (–16.3%), consistent with post-Brexit trade friction.

Import sourcing undergoes a broad diversification, with China, the United States and Türkiye as the main winners

On the import side, the United Kingdom remained the number-one supplier, yet its deliveries fell 15.9% in value, to €1.67 bn in 2025. This decline was more than compensated by rapid rises from China (+47.2%, reaching €1.12 bn), the United States (+43.1%, to €0.89 bn) and especially Türkiye (+201.4%, albeit from a low base, climbing to €0.26 bn). Serbia recorded an extraordinary 408.1% increase, though its 2025 value remained a modest €62.8 million. The overall partner concentration for imports fell sharply, underscoring a deliberate shift toward a wider and more resilient supply base.

Table 2 – Top external trading partners, 2015 vs. 2025 (billion EUR)

	Exports 2015	Exports 2025	% Change	Imports 2015	Imports 2025	% Change
United Kingdom	1.88	1.58	–16.3	1.98	1.67	–15.9
United States	1.03	1.58	+53.1	0.62	0.89	+43.1
Türkiye	0.88	1.18	+34.5	0.08	0.26	+201.4
China	0.77	0.81	+5.6	0.76	1.12	+47.2
Russia	1.08	0.05	–95.1	–	–	–
Switzerland	0.64	0.72	+12.7	0.82	0.81	–1.4
Other	5.54	6.60	+19.1	1.94	2.90	+49.3

Source: Top partners.

Price shocks highlight the vulnerability of key bilateral relationships

The shock detection algorithm flagged several abrupt price movements. In 2022, export prices to the UK jumped 17% (abnormality score of 95.2) and import prices from the UK rose 11.4%, both reflecting the inflationary environment and possibly the post-Brexit regulatory burden. The United States saw a sharp import price drop of 44.9% in 2018, accompanied by a volume surge, indicating a sudden increase in low-cost shipments. A more recent event was a 31.1% price decline in imports from China in 2023, which contributed to the overall softening of import unit costs. These shocks underline the sensitivity of certain bilateral flows to macroeconomic, logistical and policy changes.

Sectoral metamorphosis: high-value paints and inks drive the export mix, while imports tilt toward bulk intermediates

Export composition shifts towards premium paints, mastics and inks

Within the heading, the product-level breakdown by subheading reveals that the export value growth was concentrated in high-value segments. Paints and varnishes in non-aqueous media (subheading 3208) remained the largest export category, reaching €2.98 bn in 2025, up from €2.33 bn (+28%), with unit prices surging by 43%. Glaziers' putty, resin cements and other mastics (3214) climbed to €2.10 bn (+24%), while inks (3215) held at €1.59 bn (–13% in value, but price per tonne rose by 27%). Meanwhile, inorganic colouring matter (3206) saw its export value decline slightly (–9.6%) despite a 47% price increase, as volumes dropped sharply. This pattern is consistent with EU manufacturers moving upstream into more specialised, formulation-intensive products that command higher unit prices.

Table 3 – Top EU export subheadings (CN 32), 2015 vs. 2025

Subheading	Product description (short)	Value 2015 (bn EUR)	Value 2025 (bn EUR)	Price 2015 (EUR/t)	Price 2025 (EUR/t)
3208	Paints/varnishes – non-aqueous	2.33	2.98	4,283	6,123
3214	Mastics, fillers, surfacing preparations	1.69	2.10	1,581	2,273
3215	Printing, writing and other inks	1.83	1.59	8,915	11,291
3206	Inorganic colouring matter	1.42	1.28	2,616	3,843
3209	Paints/varnishes – aqueous	1.05	1.35	2,512	3,376

Source: Product segment breakdown.

Import composition underscores a reliance on inorganic colouring matter and inks

On the import side, the largest value item was ink (3215), which declined from €1.84 bn to €1.89 bn over the period, while its unit price rose from €22,549 to €24,883 per tonne. Inorganic colouring matter (3206) surged from €0.71 bn to €1.64 bn (+131% in value, despite a much smaller price rise), reflecting a huge volume expansion (+116%) – i.e. EU industry imported far larger quantities of these bulk colourants. Other notable imports were synthetic organic colouring matter (3204) at €1.30 bn and non-aqueous paints (3208) at €0.78 bn. The strong volume growth in lower-cost inorganic materials, alongside falling average import prices, points to an increasing industrial appetite for basic inputs, likely sourced from new, competitive suppliers like China and Türkiye.

Intra-EU specialisation concentrates export capacity in a few member states

The specialisation analysis for 2025 shows that a handful of EU countries dominate external exports. Luxembourg exhibits the highest revealed symmetric comparative advantage (RSCA of 0.39), followed by Belgium (0.24), Estonia (0.24), Slovenia (0.20) and Germany (0.15). Germany remains the largest absolute exporter (€4.31 bn, though down 5% from 2015), while Belgium and the Netherlands significantly increased their export shares (+29.8% and +14.3% respectively). On the import side, Germany's intake fell 25.1%, while the Netherlands (+45.6%) and especially Belgium (+297.6%) grew dramatically, suggesting that these countries have become major entry and distribution hubs for non-EU goods, consistent with the broader trade diversification observed at the EU level.

Conclusion

The EU's external trade in tanning and dyeing materials between 2015 and 2025 exhibits a clear pattern: a high-value, lower-volume export profile contrasted with a volume-heavy, price-competitive import profile. Exports have become more premium, driven by advanced paints, mastics and inks, while imports have diversified both in source and composition, absorbing large quantities of bulk inorganic colourants and other intermediates. Geopolitics – notably sanctions on Russia and the post-Brexit recalibration with the United Kingdom – significantly altered partner rankings, with the United States, Türkiye and China emerging as mainstays. The shock events and rising unit prices also underscore the sector's sensitivity to external disruptions, even as the EU's trade surplus narrowed only modestly. Going forward, the industry's ability to maintain its premium position will depend on continued innovation and the resilience of its increasingly diversified supply chains.

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