EU TRADE EXPLORER

Market evolution: Tea (CN 0902) — 2015–2025

Introduction

Between 2015 and 2025, the European Union's trade in tea (CN 0902) underwent significant value growth despite falling volumes, indicative of a profound shift toward higher-quality, packaged products. The trade deficit widened, but structural changes in both sourcing and export orientation redefined the market. This report presents an overview of the main trade dynamics—premiumisation, geographic reorientation, and the transformation of the EU's own tea manufacturing and export profile—based on the provided data.

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1. Premiumisation and the shift toward packaged tea

The most visible dynamic across the decade was a move from bulk commodity tea toward more expensive, packaged varieties, reflected in rising unit values on both the import and export sides.

Overall value grew strongly while volumes declined

Flow	Value change (2015 → 2025)	Quantity change	Price change
Exports	+35.5 %	–16.8 %	+62.8 %
Imports	+25.2 %	–6.9 %	+34.4 %

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The EU exported €265.8 million worth of tea in 2025 (up from €196.2 million in 2015) while importing €649.7 million (up from €519.1 million). Over the same period, export volumes fell from 24 777 tonnes to 20 610 tonnes, and import volumes from 134 708 tonnes to 125 435 tonnes. The divergence between value and volume points to a clear premiumisation trend, with average export prices nearly doubling.

Import composition shifted toward higher-value categories

The detailed product segment data reveals that the most dynamic import categories were those commanding the highest prices.

Import sub-heading	Value 2015 (€)	Value 2025 (€)	Change	2025 unit price (€/tonne)
Green tea ≤ 3 kg (090210)	82 613 889	144 867 897	+75.4 %	12 415
Black tea ≤ 3 kg (090230)	152 409 699	203 374 583	+33.4 %	7 965
Green tea > 3 kg (090220)	78 985 983	102 268 415	+29.5 %	4 829
Black tea > 3 kg (090240)	205 091 680	199 412 697	–2.8 %	2 973

Compare product sub-headings

Imports of green tea in small packings surged in value, while bulk black tea stagnated. This confirms that EU buyers increasingly demanded ready-to-sell, branded, or higher-quality consignments.

EU exports also moved away from bulk toward packaged, high-value teas

On the export side, the bulk segment shrank dramatically while packaged teas thrived.

Export sub-heading	Value 2015 (€)	Value 2025 (€)	Change	Quantity change
Black tea ≤ 3 kg (090230)	86 777 748	147 196 155	+69.6 %	+39.9 %
Green tea ≤ 3 kg (090210)	45 087 482	63 092 584	+39.9 %	+19.4 %
Black tea > 3 kg (090240)	46 881 852	35 478 962	–24.3 %	–59.5 %
Green tea > 3 kg (090220)	17 491 486	20 031 489	+14.5 %	–33.8 %

Compare product sub-headings

In essence, the EU reduced its role as a mere re-exporter of bulk tea and became a supplier of packaged, higher-value tea products, a trend consistent with the sharp rise in export propensity (from 7.4 % to 21.9 %, see Section 3).

2. Geographic reorientation of tea trade flows

The EU's trade map for tea was redrawn by two major forces: Brexit and geopolitical disruptions, together with a natural expansion of some extra-European markets.

Imports: the UK faded as a source while Sri Lanka and Kenya strengthened

The United Kingdom's share of EU tea imports collapsed after its exit from the single market, whereas Sri Lanka, India, and Kenya posted robust gains.

Import partner	Value 2015 (€)	Value 2025 (€)	Change
Sri Lanka	94 826 753	137 422 537	+44.9 %
China	103 032 980	119 256 523	+15.7 %
India	75 566 153	95 140 815	+25.9 %
Kenya	36 443 522	47 233 640	+29.6 %
United Kingdom	76 216 001	52 066 879	–31.7 %

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The UK's import value peaked at €116.9 million in 2019 before falling to €48.3 million in 2021, a direct Brexit effect. Meanwhile, Sri Lanka became the EU's largest tea supplier in value, benefiting from its reputation for quality and from relatively stable supply (its import CV was only 0.036, the lowest among major partners) (volatility detail). Volatility data also show that China and India remained highly stable suppliers (CVs of 0.080 and 0.081, respectively), while the UK, Vietnam, and Mozambique were far more variable.

Exports: strong growth to the US and Australia, contraction for Russia and the UK

Export partner	Value 2015 (€)	Value 2025 (€)	Change
United States	27 450 170	45 376 759	+65.3 %
Australia	5 320 243	21 785 307	+309.5 %
Switzerland	16 371 886	21 300 394	+30.1 %
United Kingdom	42 461 376	37 496 696	–11.7 %
Russian Federation	13 592 631	5 304 389	–61.0 %

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The US consolidated its position as the top non-European destination, while Australia's demand surged tenfold (quantity rose from 426 t to 2 377 t). By contrast, exports to Russia fell sharply after 2014 sanctions, and the UK's post-Brexit import regime also pushed its purchases down. Export concentration, as measured by the HHI, fell from 941 to 771, indicating successful market diversification (concentration trends).

Price shocks punctuated the steady realignment

Several abrupt price events confirm the market's exposure to supply-chain tensions and geopolitical risks. The strongest import price shock hit Argentina in 2022 (+30.3 % shift), alongside simultaneous price surges from China (+19.4 %) and Kenya (+23.5 %), reflecting post-pandemic logistics bottlenecks and global food-price pressures (shock events). On the export side, Switzerland (+27.4 % price shift in 2023) and Japan (–24.7 % in 2019) saw notable re-pricings, while Ukraine experienced a dramatic price spike in 2017, coinciding with the first major disruption of its trade flows.

3. Poland's rise as an export hub and the transformation of EU tea manufacturing

Behind the continent-level numbers lies a reorganisation of the EU's internal tea industry: one Member State, Poland, emerged as the bloc's dominant exporter, while domestic production contracted sharply in volume but moved up the value chain.

Poland displaced traditional tea-exporting nations

Poland's exports exploded from €45.1 million in 2015 to €120.8 million in 2025 (+168 %), largely at the expense of historical leaders like the Netherlands.

EU Member State	Export value 2015 (€)	Export value 2025 (€)	Change
Poland	45 057 949	120 777 539	+168.0 %
Germany	75 326 806	75 071 837	–0.3 %
France	25 835 559	24 977 584	–3.3 %
Netherlands	20 451 927	11 309 562	–44.7 %
Ireland	4 815 095	7 083 029	+47.1 %

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Poland's revealed comparative advantage (RCA) stood at 3.39 in 2025, far above Germany's 1.52, and its RSCA of 0.54 signals deep specialisation in tea exports (specialisation map). Meanwhile, countries such as the Netherlands and Sweden lost export share, and highly de-specialised economies like Malta, Cyprus, and Romania played almost no role in tea exports.

Domestic production shrank in volume but increased in value

EU manufacturing of tea (proxied by Prodcom 10.83.13.00, "tea in immediate packings ≤ 3 kg") contracted from about 240 million kg in 2003 to 100 million kg in 2024, a fall of 58 %. Yet production value rose from €749 million to €943 million over the same horizon (production volumes). This mirrors the trade dynamics: fewer, but much more valuable, units produced.

The EU tea sector became far more export-oriented

Structural indicators confirm a decisive pivot toward external markets.

- Export propensity (exports as a share of production) jumped from 7.4 % in 2015 to 21.9 % in 2024 (export propensity).
- Trade intensity (total trade relative to production) rose from 23.0 % to 41.2 % (trade intensity).
- Net import reliance, albeit still modest, edged down from 11.3 % to 9.7 % (net import reliance).

In short, the EU's tea industry has become leaner, more specialised, and significantly more integrated into global value chains, with Poland acting as the bloc's main processing and re-export platform.

Conclusion

Over the 2015–2025 period, the EU tea market experienced a comprehensive upgrading: total trade values rose despite falling volumes, driven by a shift from bulk black tea to packaged and green teas. The geography of trade was reshaped by Brexit, which severely reduced the UK's role as both supplier and customer, and by expanding exports to the US and Australia, while Russia's relevance collapsed. Internally, Poland emerged as the unchallenged export champion, increasing its exports nearly threefold, while domestic EU production pivoted toward higher-value items. These dynamics, reinforced by stable supply from Asian partners and a few sharp price shocks, illustrate a market that has successfully moved up the value chain and diversified its trade relationships, even as its overall trade deficit deepened.
