Market evolution: Tin and tin products (CN 80) — 2015–2025

Introduction

This report examines the external trade of the European Union in **tin and articles thereof** (customs code 80) with non-EU partners over the eleven-year window 2015–2025. The product group comprises unwrought tin, tin waste and scrap, tin bars, rods, profiles and wire, and other tin articles. The analysis draws exclusively on the data supplied, describing the main dynamics in trade values, volumes, prices, geographical patterns, concentration, specialisation, volatility and structural autonomy. All figures are taken directly from the interactive dashboards referenced throughout the text.

Three overarching trends emerge: a persistent price surge that dwarfed a sharp contraction in physical volumes; a profound geographic reorientation of both import sources and export destinations; and a marked reduction in the EU's external dependence, as domestic production absorbed a larger share of the tin economy.

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1. A persistent price surge eclipses a dramatic volume contraction

Export and import values rose despite falling quantities, pointing to a strong price-led dynamic

While the value of EU exports grew from €183 million in 2015 to €304 million in 2025 (+65.9 %), the tonnage shipped fell from 12 340 tonnes to 9 353 tonnes (–24.2 %). Similarly, import value increased from €782 million to €961 million (+23.0 %) even as import volumes collapsed from 62 129 tonnes to 33 935 tonnes (–45.4 %). The discrepancy is explained by a massive jump in unit prices. View the headline trade figures

Unit prices more than doubled on both sides, with the strongest acceleration after 2020

Average export prices climbed from €14 866 per tonne to €32 547 per tonne (+118.9 %), while import prices rose from €12 580 to €28 327 per tonne (+125.2 %). The steepest increases occurred in 2021–2022, when global tin markets were hit by severe supply-side shocks. See the price evolution on the overview tab

The EU’s trade deficit widened only moderately as higher prices partially offset the volume slump

The trade balance moved from a deficit of –€598 million in 2015 to –€657 million in 2025, a deterioration of 9.8 %. This relatively small increase in the nominal deficit reflects the fact that, for imports, the quantity halved, while for exports the volume decline was less pronounced.

Indicator	2015	2025	Change
Exports (€ million)	183.5	304.5	+65.9 %
Export quantity (t)	12 340	9 353	–24.2 %
Export price (€/t)	14 866	32 547	+118.9 %
Imports (€ million)	781.7	961.3	+23.0 %
Import quantity (t)	62 129	33 935	–45.4 %
Import price (€/t)	12 580	28 327	+125.2 %
Trade balance (€ million)	–598.2	–656.8	–9.8 %

2. A profound geographic reorientation of both imports and exports

South American and Chinese suppliers gained ground as Indonesia’s share eroded and the UK vanished as a significant source

EU imports of tin products underwent a dramatic restructuring. Indonesia remained the largest supplier but its value fell by 21.3 % (€274 million in 2015 → €216 million in 2025). Meanwhile, Brazil (+314.5 % to €132 million), Bolivia (+304.5 % to €114 million) and China (+332.8 % to €124 million) rose sharply. The United Kingdom, once a supplier of €62.9 million, collapsed to €5.4 million (–91.5 %), and Malaysia dropped by 72.0 %. Explore the top import partners

Import partner	2015 (€ million)	2025 (€ million)	Change
Indonesia	274.5	216.1	–21.3 %
Peru	113.2	126.1	+11.4 %
Brazil	31.9	132.2	+314.5 %
Bolivia	28.1	113.7	+304.5 %
China	28.6	123.9	+332.8 %
United Kingdom	62.9	5.4	–91.5 %
Malaysia	67.2	18.8	–72.0 %

Export destinations underwent a parallel transformation, with the United States and Japan replacing the United Kingdom as the leading markets

EU exports were reoriented away from the UK, which fell by 58.8 % (€55.3 million to €22.8 million). The United States took the lead, growing 116.2 % to €85.4 million. Japan witnessed an extraordinary rise (+1 779.5 % to €52.6 million), and Bosnia and Herzegovina expanded steadily (+177.6 % to €29.4 million). Exports to Mexico and Malaysia remained more modest and volatile. Inspect export partners

Export partner	2015 (€ million)	2025 (€ million)	Change
United States	39.5	85.4	+116.2 %
United Kingdom	55.3	22.8	–58.8 %
Bosnia & Herzegovina	10.6	29.4	+177.6 %
Japan	2.8	52.6	+1 779.5 %
Türkiye	9.0	14.5	+62.1 %
Mexico	8.9	4.9	–45.3 %
Malaysia	0.8	2.7	+234.5 %

The HHI concentration index fell for imports, reflecting a welcome diversification of supply

The Herfindahl-Hirschman Index for imports dropped from 2 063 in 2015 to 1 243 in 2025 (–39.7 %), signalling a more balanced portfolio of foreign suppliers. Export concentration declined only modestly (from 1 506 to 1 330, –11.7 %), as the US and Japan consolidated their positions while the UK faded. See concentration metrics

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3. Shrinking external dependence masks a more self-contained EU tin economy

Net import reliance fell from 72 % to 47 %, signalling a structural reduction in foreign dependence

The share of EU apparent consumption met by net imports (imports minus exports) declined from 72.3 % in 2015 to 46.6 % in 2024 (–35.5 %), the lowest point of the series. This improvement came from a combination of falling import volumes and rising domestic production. Check vulnerability indicators

Export propensity dropped from 95 % to 43 %, as a larger share of EU production was absorbed domestically

The ratio of exports to EU production (export propensity) plunged from 94.5 % in 2015 to 43.1 % in 2024. In parallel, overall trade intensity (the sum of imports and exports relative to production) fell from 98.8 % to 75.3 %. The EU tin sector has therefore become notably more inwardly oriented. Explore export propensity

Despite a 21 % increase in EU production volume, the value of output nearly quadrupled, mirroring global price trends

EU production of tin and tin products rose from 29.7 million kg (2006) to 36.0 million kg in 2024 (+21.0 %). The value of that output soared from €158 million to €630 million (+298.5 %), dramatically outpacing volume growth. This reflects the same price environment visible in international trade and highlights the commodity-linked nature of the sector. View production volumes

Conclusion

Over the 2015–2025 period, the EU's external tin trade was reshaped by powerful price surges, a halving of import volumes, and a dramatic repositioning of both sourcing and export markets. The Union diversified its imports away from the United Kingdom and traditional Asian partners towards South American and Chinese suppliers, while exports pivoted towards the United States and Japan. The EU's dependency on foreign tin fell markedly, with net import reliance dropping to a record low and domestic production playing a larger role. Nevertheless, the sector remains exposed to global price shocks, as the record-high unit values of 2021–2022 and the accompanying volatility in trade flows vividly illustrate.

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