EU TRADE EXPLORER

Market evolution: Uncoated paper (CN 4802) — 2015–2025

Introduction

The EU's trade in uncoated graphic paper (CN 4802) between 2015 and 2025 reveals a sector in transition. While the nominal export value fell relatively modestly, the underlying physical volumes contracted sharply, pointing to a market driven by rising prices and structural demand changes. Shifting geopolitics – especially Brexit and the war in Ukraine – have redrawn the map of main partners, while the 2022 energy-price spike injected exceptional volatility into a traditionally stable trade. This report identifies the main dynamics behind these developments, based exclusively on the data provided.

1. A structural contraction in export volumes partially offset by rising unit values

Export value declined moderately, but the physical volume shrank much more dramatically.

EU extra-EU exports of CN 4802 fell from €3.20 bn in 2015 to €2.59 bn in 2025, a decrease of –19.2 % in value. However, the exported quantity plunged from 3.77 million tonnes to 2.31 million tonnes (–38.6 %). The gap was filled by a sharp rise in the average export price, which climbed from €850 per tonne to €1 118 per tonne (+31.6 %). This suggests that the EU is shipping less paper but capturing higher value per unit, likely reflecting a shift towards more specialised or higher-quality grades.

The import side remained comparatively flat, narrowing the trade surplus.

Imports stayed within a narrower band, declining from €647 mn in 2015 to €619 mn in 2025 (–4.3 %) while the imported quantity dropped by –12.1 % (from 773 k t to 680 k t). As a result, the EU's trade surplus contracted from €2.55 bn to €1.97 bn (–23.0 %), reinforcing the picture of a shrinking but still sizeable net-export position.

General Overview

EU production fell, yet export propensity increased.

Domestic production of CN 4802 decreased by –14.0 % in volume over the period (from 11.35 bn kg to 9.76 bn kg), while the value of production remained almost unchanged (–0.0 %), indicating that, like trade, production was increasingly driven by higher unit values. Despite the fall in output, the share of production exported (export propensity) rose from 27.1 % in 2015 to 28.6 % in 2024, meaning the EU relies more, not less, on extra-EU markets to absorb its output. The net-import reliance ratio moved from –15.1 % to –27.9 %, underscoring the EU's growing role as a net exporter relative to its own domestic market.
Production volumes | *Export propensity*

2. Geopolitical realignments: post-Brexit UK decline, Russia's exit, and the rise of Asian suppliers

The United Kingdom lost its dominant position as both an export destination and an import source.

UK-bound exports fell from €897 mn in 2015 to €595 mn in 2025 (–33.6 %), while imports from the UK collapsed from €175 mn to €53 mn (–69.9 %). Nevertheless, the UK remained the top export market. The sharp reduction in UK imports of uncoated paper reflects the post-Brexit trade barriers and the UK's dwindling role as a re-export hub for graphic paper.
Top Partners

Russia completely disappeared from EU trade after 2022.

Imports from Russia dropped from €33.8 mn in 2015 to virtually zero (€105) in 2025 (–100.0 %), and exports to Russia suffered similarly, as sanctions imposed after the invasion of Ukraine abolished a once-significant trade flow. The import quantity fell from 55 k t to 0.014 t. This is the clearest shock to the EU's supplier base.

Imports from Indonesia and China surged, diversifying the import basket.

In contrast, imports from Indonesia soared from €53 mn to €193 mn (+260.6 %), while China jumped from €18 mn to €63 mn (+251.3 %). These two countries, alongside Norway (which remained the largest supplier at €126 mn), now dominate the EU's external sourcing of uncoated paper, compensating for the loss of Russian and British volumes.

Export markets in the United States and Ukraine proved resilient.

Exports to the USA grew by +12.3 % (€283 mn → €317 mn), and Ukraine, despite the war, increased from €67 mn to €84 mn (+25.8 %). Turkey and Switzerland, two other major destinations, remained broadly stable, reinforcing a core set of non-EU markets that absorb the EU's surplus.

3. The 2022 price earthquake and the new volatility landscape

A synchronised price shock hit both exports and imports in 2022.

The most pronounced single-year shift occurred in 2022, when the average export price jumped from €839/t to €1 274/t and the import price from €782/t to €1 117/t. The shock was widespread. Among exports, the largest price abnormality was recorded for the UK (+44.2 %), followed by Mexico (+90.9 %), Russia (+81.7 %) and Switzerland (+46.9 %). On the import side, Indonesia saw a +57.7 % price spike, Norway +59.7 %, and Canada +64.2 %. These disruptions were linked to spiking energy costs, logistics bottlenecks, and the immediate market turmoil caused by Russia's invasion.
Top Shock Events

Volatility soared and has not fully subsided.

The coefficient of variation of import quantities was particularly high for UK (0.65), Russia (0.71), China (0.69) and the US (0.78), reflecting erratic trade flows post-2021. On the export side, volatility was lower but still notable for Mexico (0.36) and Russia (0.69). Overall, the Herfindahl-Hirschman import concentration index rose from 1 478 to 1 704 (+15.3 %), indicating that the EU's import sourcing became less diversified, while export concentration eased slightly (–12.3 %). This diverging trend suggests a more vulnerable import supply chain and a comparatively more diverse export portfolio.
Volatility | *Concentration*

The supply shock from Russia was the most extreme.

Russian import quantities plunged from an average 56 k t per year in the baseline period (2015–2022) to just 367 t per year after sanctions, while the import price simultaneously peaked at over €3 560/t (a +523 % price surge for the tiny remaining volumes). This illustrates a near-total trade severance that the EU had to absorb by reorienting towards Asian suppliers.

Conclusion

EU trade in uncoated graphic paper over the last decade is characterised by a physically shrinking export engine that has been partially compensated by price increases, resulting in a moderately lower but still substantial trade surplus. Geopolitical events have permanently altered partner structures: the UK dropped in importance, Russia was eliminated, and Indonesia/China filled the import gap. The 2022 energy and sanctions shocks injected exceptional price volatility, the effects of which are still visible in higher price levels and slightly more concentrated import markets. The EU remains a strong net exporter, but the trend points to a market that is becoming leaner, more specialised, and more exposed to external price and supply shocks.

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